



City of Milwaukee

200 E. Wells Street
Milwaukee, Wisconsin
53202

Meeting Minutes

HOUSING TRUST FUND ADVISORY BOARD FINANCE SUBCOMMITTEE

VINCENT LYLES, CHAIR

Cathie Madden, Vice-Chair

Brian Peters, Ray Schmidt, Bethany Sanchez

Staff Assistant, Terry MacDonald

Phone: (414)-286-2233; Fax: (414) 286-3456, E-mail: tmacdo@milwaukee.gov

File Specialist, Joanna Polanco, E-mail: jpolan@milwaukee.gov

Monday, July 2, 2007

3:30 PM

Room 301-B, City Hall

Meeting convened: 3:39 P.M.

1. Roll call

Present 5 - Sanchez, Madden, Peters, Schmidt and Lyles

Also present: Tom Gartner-Assistant City Attorney, Emma Stamps-Legislative Reference Bureau, Jeff Osterman-Legislative Reference Bureau and Steve Mahan-Community Block Grant Director, Martha Brown and Maria Prioletta staff from Department of City Development

2. Selection of Vice Chair

Ms. Madden offered to be Vice Chair. Mr. Lyles appointed Ms. Madden as Vice Chair. There were no objections.

3. Review of Milwaukee Housing Trust Fund funding options previously considered

Mr. Lyles introduced Mr. Leo Reis who had served as the chair of the Housing Trust Fund Task Force Financing Models Subcommittee (HTTFMS) and said that this Subcommittee has asked Mr. Reis to appear to give an overview on the funding options that had been considered by the HTTFMS.

Mr. Reis said that the biggest challenge is in trying to figure out a good funding source and to come up with good policy and good politics. He said that they had come up with a lot of great funding sources, but a lot of them were ruled out for political reasons, because they weren't view as feasible. He said the goal would be to get a funding source that is dedicated and predictable and would not be subject to annual reallocation decisions, something that is substantial, something that is under local control and finally something that would not be seen as cutting out other revenue sources.

Mr. Reis said that when the HTTFMS debated the Housing trust fund, it reviewed a variety of funding sources and some were fairly modest, such as the sale of public land and parking structure revenues. He asked if the board wants to get revenues from many sources or just one significant revenue source? He said he would argue for the latter, because any of these funding sources will take a political battle, and if they could focus on just one significant funding source it would be a more efficient use of everyone's time.

Mr. Reis said when the HTTFMS finally concluded its work; it basically came up with a two pronged approach. One was to use a city tax revenue bond of \$2.5 million that would get the Housing Trust Fund up and running and that would buy some time for them to go

through the legislators to get approval for the TIF idea. The proposed TIF idea basically was that they would get authorization from the legislator to allow TIF's to remain open for 2 to 4 years beyond what is needed for the project, in other words it would build 10% in funds from every TIF District for the Housing Trust Fund.

The current legislative bill under consideration right now in the state would allow the extension of TIF's for one year and that 75% of the funds would be available for the Housing Trust Fund and the remaining 25% would be for available for lead abatement activities. He said one of the problems that they would be faced with if they go with the TIF idea would be that they would have to wait 15 years for new TIF projects to end.

Mr. Reis referred to "City Housing Trust Fund Revenue Sources" (Exhibit 1) handout given by Ms. Madden and said some of the cities listed use sales taxes and general revenue funds and said he doesn't see those as possible revenue sources for this Housing Trust Fund, because it would be a hard sell and it would be too much of a political battle.

Mr. Reis explained some of the other revenue sources that were considered, such as a county transfer fee and a linkage fee. He said the following two tax credit ideas were discussed: a) State to approve tax credit for contribution that would go to the trust fund, and b) Create a statewide affordable housing credit. Mr. Reis referred to the "Updated Summary Neighborhood Assistance Legislation – August 2005" (Exhibit 2) and said that it has a list of states and what kind of tax credit they offer.

Mr. Reis said that the best way to go is to advocate strongly for the policy on TIF and explained that TIF's would have a built-in percentage that would go into a Housing Trust Fund.

Mr. Peters said he met with a person from St. Louis and they talked about a use tax and maybe this subcommittee can discuss that further at a later time.

Ms. Sanchez said that she recalls that there was a longer list of options that was discussed by the HTFTF than what Mr. Ries has mentioned and asked if some of the ideas were rejected at the begin.

Mr. Reis replied that what he explained up until now was what was in the final report and from the notes he had, but there may have been more that he doesn't know about.

Ms. Sanchez said she recalls other funding options that were discussed and said she will get that information together for the members.

Ms. Madden said that there are many kinds of developer fees and because the real estate boom is on the down side, was some of those developers fee's not considered.

Mr. Reis replied that at the time the HTFTF was taking place, the Park East corridor debate was going on and there was a group advocating for public benefits, such as affordable housing, prevailing wages and environmental issues. He said that Milwaukee doesn't have a requirement for developers to do affordable housing.

Ms. Madden asked if a conversion fee was considered?

Ms. Reis replied that they did look at putting a linkage fee on condominiums.

Ms. Dummer Combs appeared and said that the City Attorney said they couldn't put a linkage fee only on condominiums, because there is a state statute that says all types of

real estate are to be tax equally.

Mr. Reis said the other complaint they received is from the developers because it would be taking money out of their pockets.

Ms. Madden asked if they could look at other states on how they got around putting a conversion fee on some housing projects and not others.

Ms. Brown replied that it is in the state of Wisconsin constitution.

Mr. Ries said that it would require a change to the state statute.

Ms. Sanchez said developer fees, linkage fees, hotel motel taxes, etc. are the most common across the country.

Ms. Sanchez explained the way a linkage fee is calculated in San Diego, California.

Mr. Ries read into the record the linkage fee rates for Boston, San Francisco, Sacramento, San Diego and said there is a lot of variation in the rates. He further said that the Good Jobs and Livable Neighborhoods Coalition had submitted a linkage fee proposal for the Park East Corridor. That linkage fee program would have developers, contributing .99 cents per square foot for office developments and .75 cents for commercial developments and any development under 30,000 square feet would be exempt. Mr. Ries further said that state legislation would be required.

Mr. Schmidt asked if the tax credit policies are incentives or an award.

Mr. Ries replied that all of the programs are meant to be incentives.

Ms. Brown replied that one of the recommendations made by the Special Needs Housing Action Team was to establish a state low income housing tax credit and its purpose would be to encourage the kind of affordable housing that the Housing Trust Fund is also looking to do.

Ms. Pioletta explained that the federal tax credit program generates about \$80 million in the state of Wisconsin for affordable housing purposes and about 40-45% of those funds are allocated to the city of Milwaukee. She said the state has a companion program, where local corporations that pay state income tax could purchase additional credits as additional investments and receive a credit toward their state tax.

Ms. Brown referred to Mr. Reis' suggestion on the use of retired TID as a way to get revenue for the Housing Trust Fund and explained that she has a lot of difficulties with that suggestion, because it takes along time to retire a TID and to extend the life of a TID would delay the ability of the city to reap the tax benefits.

Ms. Brown suggested that they consider establishing a trust fund that would produce revenue. She asked if they have look into seeking investments from say pension funds or other entities that have cash to invest?

Mr. Lyles asked how would the City of Milwaukee be able to take its dollars and bid out to the various financial services companies and would the City then stop putting money into the Trust Fund?

Mr. Ries said his understanding of what Mr. Lyles is saying is that they would have to

persuade high wealth individuals, corporations or local government to forgo some revenue on a project or on a pool of investments and that a certain percentages of the investment's interest would go into the Housing Trust Fund. He said that they had recently had a similar conversation with the BATA Foundation, Inc. where the BATA Foundation would forgo the interest on a CD deposit to help a business owner with a project that was otherwise not doable.

Ms. Madden said for example, San Antonio went to banks for investments.

Ms. Prioletta suggested going to insurance company.

Ms. Brown suggested the City of Milwaukee pension fund.

Mr. Reis asked how large of a fund would they need to come up with \$5 million a year?

Ms. Madden suggested that they could use investments as one strategy and partner it with say low interested loans.

Mr. Reis said that maybe they could get Mr. John Seifert with Northwest Mutual Life to come to one of the HTFABFS meetings to give a presentation on investments.

Ms. Sanchez asked if the city would administer the funds?

Mr. Ries replied that who would administer the fund would have to be looked at, because the private sector probably wouldn't like it if the city had full administration rights to the funds if they are putting in funds.

Mr. Lyles said the Housing Trust Fund mission would stay the same, but they would have multiple sources of funding. He further said that the issue of sustainability is most important and to keep in mind that funding from the city and county for the Housing Trust Fund could change each year due to circumstances within government, such as more police officers needed.

Ms. Sanchez said she likes the idea of private funding and suggested that they could use the private sector funding for matching or leveraging of the trust fund monies that already exist. She said it is important for the city to have funding budgeted for the Housing Trust Fund.

Ms. Madden said if this seed of money in the Housing Trust Fund doesn't continue and grow all the thing they are working for would go away.

Ms. Reis said that they should pursue the idea of funding from the private sector. He asked what is the possible source of public money that could be designated to the Housing Trust Fund?

Ms. Sanchez replied that a transfer fee makes sense. She also suggested the linkage fee, such as the .25 cent per square foot paid by developers.

Ms. Madden asked if the \$2.5 million is a yearly dedicated funding source in the City's Budget for the Housing Trust Fund?

Ms. Stamps appeared at the table and said the city is contributing a one time funding of \$2.5 million. Ms. Stamps further said that the Comptroller's concern is that the tax levy should not support the debt repayment, which is one of the reason why the Housing Trust

Fund Advisory Board needs to come up with alternative funding sources to pay the debt service on whatever borrowing the City does on the \$2.5 million.

Mr. Lyles asked where are they suppose to come up with the money to pay the debt services?

Ms. Stamps replied that the Housing Trust Fund Advisory Board will need to come up with the funding sources to pay the debt services.

Ms. Dummer Combs said the debt repayment is to be paid back by a portion of the revenues received for the Housing Trust Fund, which will come from TIF closure revenues, any increase in the Potawatomi monies and any new payments in lieu of taxes (PILOT) agreements and any excess after debt repayment is what can be disburse annually.

Ms. Sanchez asked what is the repayment period of the \$2.5 million is.

Mr. Ries said to pay back \$2.5 million would require \$400,000 to \$500,000 a year for fifteen years.

Ms. Dummer Combs referred to Common Council Resolution File Number 060071 (Exhibit 3) and said that to pay back \$5 million would take \$350,000 to \$583,000 a year for fifteen years, so it would be half of that amount to pay back \$2.5 million.

Mr. Peters asked when will the new revenues from Potawatomi and the other sources come in?

Ms. Dummer Combs replied that the payments are made yearly and the excess will be disbursed in the same year.

Mr. Schmidt asked how much would the excess dollar amount be per year?

Ms. Dummer Combs replied that it would be about \$1 million. She further explained that according to the Common Council File Number 060071, it says that TIF closures could generate about \$2.6 million in revenues in 2007.

Mr. Peters asked what if they don't use all of the \$2.5 million?

Ms. Dummer Combs replied that the bond repayment would be less.

Ms. Dummer Combs referred again to the Common Council File Number 060071 and said the PILOTs could generate \$20,000-\$27,000 per year for the Housing Trust Fund and Potawatomi could bring in \$3.3 to 3.8 million a year.

Ms. Stamps said that they can only use what the city already by law is allowed by the compact with Potawatomi.

Ms. Sanchez said for the record most of the HTFTF members were uncomfortable with the bonding option, but in the end it was the only thing that was going to work.

Ms. Madden said that they should continue to explore both public and private funding options.

Mr. Peters said that basically what St. Louis is doing is that they tax businesses that

purchase supplies from out of state and said that is something that might be politically feasible here.

Ms. Madden explained that St. Louis had passed two ordinances, the first is for a use tax and second was to set a portion of that use tax to be dedicated to a housing trust fund. She said that St. Louis structured it so that the goods and services purchased outside the state over \$2000 would be subject to a use tax and the second ordinance was setup to get a portion of the use tax dedicated to a housing trust fund.

4. Review of any legislative restrictions to funding considerations

Discussed under item #3.

5. Discussion relating to other Cities Housing Trust Fund funding sources

Discussed under Item #3

6. Discussion related to proposed funding sources for the Housing Trust Fund

Discussed under item #3.

7. Set the next meeting date and agenda

August 6, 2007 at 3:00 P.M. in Room 301-B.

Mr. Lyles said that he would like to have discussion on the following topics at future meetings:

1. Legislative update.

2. Discussion relating to exploring funding sources for the Housing Trust Fund, such as TIF option, use fee and investment options.

3. That they have a model out of what it would take to generate \$2.5 million and then think about ways that they could come up with that amount of money.

Mr. Lyles asked if there are any suggestions for possible discussion for future meetings?

Mr. Reis said he would contact Mr. John Siefert with Northwest Mutual Insurance Co. to see if he could appear to discuss investment options.

Ms. Sanchez said that Ms. Mary Brooke said that she would address the Subcommittee by phone conference to discuss what other cities have done.

Ms. Madden said that at a future meeting they should discuss how to structure disbursed fund, such as grant, low interest loans, forgivable loans, etc.

Mr. Schmidt said that the structure of disbursement of funds could be included in the model.

Mr. Schmidt said he would like more information on the tax credits.

Ms. Brown suggested getting a tax attorney to come to a meeting to discuss tax credits.

Meeting adjourned: 5:03 P.M.

**Terry J. MacDonald
Staff Assistant**

CITY HOUSING TRUST FUND REVENUE SOURCES

Jurisdiction	Housing Trust Fund	Revenue Sources
Tucson, Arizona	Housing Trust Fund	MF rental conversion fee; Unexpended funds from Utility Services U Assistance Program
Berkeley, California	Housing Trust Fund	Developer Impact fees
Citrus Heights, California	Affordable Housing Trust Fund	Developer Impact fees; Inclusionary in-lieu fees
Cupertino, California	Affordable Housing Fund	Developer impact fees
Elk Grove, California	Affordable Housing Fund	Developer Impact fees
Livermore, California	Housing Trust Fund	Inclusionary in-lieu fees; program income
Long Beach, California	Housing Trust Fund	Transient occupancy tax
Los Angeles, California	Affordable Housing Trust Fund	Tax increment financing; General Fund (DWP); Other
Mammoth Lakes, California	Housing Trust Fund	Transient occupancy tax
Menlo Park, California	Below Market Rate Housing Program	Developer impact fees; loan repayments
Oakland, California	Affordable Housing Trust Fund	Developer impact fees
Oxnard, California	Affordable Rental Housing Trust Fund	Developer impact fees
Palo Alto, California	Affordable Housing Fund	Developer impact fees
Pasadena, California	Housing Trust Fund	Developer impact fees
Petaluma, California	Housing Fund	Developer Impact fees; Inclusionary in-lieu fees; Tax increment financing
San Diego, California	Housing Trust Fund	Developer Impact fees
San Francisco City and County, California	Affordable Housing Funds	Developer Impact fees; Inclusionary in-lieu fees Transient occupancy tax; General fund
San Jose, California	Housing Trust Fund	Increased tax increment funds; Inclusionary in-lieu fees
Santa Cruz, California	Affordable Housing Trust Fund	Inclusionary in-lieu fees
Santa Monica, California	Citywide Housing Trust Fund	Developer impact fees; inclusionary in-lieu fees
Santa Rosa, California	Housing Trust	Tax increment financing; inclusionary in-lieu fees; Reserve; Bond financing; General fund (growth in real estate transfer tax)
West Hollywood, California	Affordable Housing Trust Fund	Developer Impact fees; Program income
Boulder, Colorado	Community Housing Assistance Program	Property tax and Housing Excise tax; General fund
Longmont, Colorado	Affordable Housing Fund	Inclusionary in-lieu fees; General fund
Chicago, Illinois	Low Income Housing Trust Fund	City Corp funds
Highland Park, Illinois	Affordable Housing Trust Fund	Residential demolition tax
Bloomington, Indiana	Housing Trust Fund	
Indianapolis, Indiana	Housing Trust Fund	Electronic filing fees for property sales disclosure forms; Public/private Investments
Oskaloosa, Iowa	Housing Trust Fund	FHLBank
Lawrence, Kansas	Housing Trust Fund	
Massachusetts CPA communities	Community Preservation Act	Property tax
Boston, Massachusetts	Neighborhood Housing Trust	Developer Impact fees
Boston, Massachusetts	AFSCME Council 93 AFL-CIO Housing Trust Fund	Union agreement
Cambridge, Massachusetts	Affordable Housing Trust	Developer Impact fees
Ann Arbor, Michigan	Housing Trust Fund	PUD developer fees
Duluth, Minnesota	Housing Investment Fund	Casino revenues
Minneapolis, Minnesota	Affordable Housing Trust Fund	Housing revenue bond fees; Miscellaneous funds; General fund
St. Paul, Minnesota	Neighborhood STAR Program	Sales tax
St. Louis, Missouri	Affordable Housing Trust Fund	Use tax
New Jersey COAH communities	Council an Affordable Housing	Developer fees
Santa Fe, New Mexico	Community Housing Trust	Developer contributions
New York, New York	Battery Park City Housing Trust Fund	Excess lease revenues
Asheville, North Carolina	Housing Trust Fund	General fund
Charlotte, North Carolina	Housing Trust Fund	Bond revenues
Portland, Oregon	Housing Investment Fund	General fund
Philadelphia, Pennsylvania	Housing Trust Fund	Document recording fees
Charleston, South Carolina	Lowcountry Housing Trust	General fund; Public/private investments
Knoxville, Tennessee	Affordable Housing Trust Fund	General fund
Austin, Texas	Housing Trust Fund	General fund
San Antonio, Texas	Housing Trust	Finance corporation bonds; Interest and earnings
Salt Lake City, Utah	Housing Trust Fund	RDA commitments
Burlington, Vermont	Housing Trust Fund	Developer fees: condominium conversion, housing replacement, and inclusionary in-lieu fees; Property tax
Montpelier, Vermont	Revolving Loan Fund	Property tax
Alexandria, Virginia	Housing Opportunities Fund/Housing Trust Fund	Property tax (to back bond); Developer contributions; Interest and repayments; Other
Manassas, Virginia	Housing Trust Fund	General fund
Bainbridge Island, Washington	Housing Trust Fund	General fund
Seattle, Washington	Housing Levy Program	Property tax levy
Madison, Wisconsin	Affordable Housing Fund	General fund

Updated Summary Neighborhood Assistance Legislation

August 2005

LISC

Local Initiatives Support Corporation

Prepared by: Arielle V. Linsky, State Policy Intern

Original research based on information from Neighbors Building Community.
Jenice L. View & Carol E. Wayman. Union Institute. 1995.

Revision of July 2001, September 2002, Summary Neighborhood Assistance Legislation

EXHIBIT

tabbles

P

WEST VIRGINIA

Name of Program: Neighborhood Investment Program (NIP)
Conception: 1996
Statute: §11-13J
Oversight: West Virginia Development Office; NIP Advisory Board Twelve member council to select and approve projects, consisting of four officers of corporations licensed to do business in West Virginia, four executive directors of local non-profit organizations, and four economically disadvantaged persons of the state)

Tax Credit Amount: 50%
State Credit Limit: \$2 million
Project Credit Limit: None

Minimum Business Donation (Credit): \$500 (\$250)
Maximum Business Donation (Credit): \$200,000 (\$100,000)
Tax Credit Carryover for Businesses: None

Donation Recipients: Nonprofit organizations (specifically, community based organizations)
Eligible Services: Community services (counseling, emergency assistance, healthcare services), crime prevention, education, housing, job training, physical and environmental improvements
Eligible Donations: Cash, property, goods and services (due to a strict approval process, those services allowed are few), technical assistance, stock

Other: Tax credits are awarded to approved nonprofit organizations, which in turn use the credits as incentives to encourage donations; projects must occur within a certified "economically disadvantaged area;" the state collects a certification fee of three percent of every donation they issue credits for.

Available Statistics:

Fiscal Year	Number of Donation Recipients	Amount of Credit Awarded	Amount of Credit Claimed	Amount of Donations Received	Percent of Credit Distributed
1997	68	\$1,999,377	\$204,253	\$408,507	10.2%
1998	73	\$2,000,000	\$573,986	\$1,148,194	28.7%
1999	77	\$1,999,978	\$801,899	\$1,603,798	40.1%
2000	61	\$2,000,000	\$1,072,048	\$2,144,097	53.7%
2001	73	\$2,000,000	\$1,233,002	\$2,889,629	62%
2002	81	\$2,000,000	\$1,518,056	\$3,097,307	76%
2003	102	\$2,000,000	\$1,625,990	\$3,308,327	81%
2004	116	\$2,000,000	\$1,657,617	\$3,369,305	83%
**2005	121	\$2,000,000	\$1,760,920	\$3,945,677	88%

*Other information available: number of project applications, number of counties represented, total amount of credit requested, average amount of credit requested, and certification fee collected.

**Year-end close-out incomplete at the time of survey – statistics are not final

Website: <http://www.wvdo.org/index.cfm?main=/community/index>
Contact: Lisa Wells, Community Development Representative Lwells@wvdo.org
 West Virginia Development Office
 Capitol Complex, Building 6, Room 553
 Charleston, WV 25305-0311
 Phone: (304) 558-2001 Fax: (304) 558-2246

SOUTH CAROLINA

Name of Program: Community Economic Development Act
Conception: 2000
Statute: §34:43:10-50
Oversight: Department of Commerce

Tax Credit Amount: 33%
State Credit Limit: \$1 million/year for 5 years
Project Credit Limit: There is a limit of no more than \$250,000 Tax Credits per certified organization, per year (a limit of approximately \$750,000 dollars of cash investments per CDC-CDFI, per year).

Minimum Business Donation (Credit): None
Maximum Business Donation (Credit): None
Tax Credit Carryover for Businesses: 10 years

Donation Recipients: Nonprofit organizations (specifically, those organizations certified as community development corporations (CDCs) or community development financial institutions (CDFIs) by the Department of Commerce)

Eligible Services: Community services, education, housing development, entrepreneurship, job training, economic development, neighborhood assistance, provision of credit, capital or development services

Eligible Donations: Cash

Other: Certified nonprofit organizations use the credits as incentives to encourage donations.

Available Statistics: N/A

Website: http://www.scommerce.com/CDCs_tax.html

Contact: Shaunte Evans, Manager sevans@scommerce.com
Community Development Corporation Initiatives
South Carolina Department of Commerce
Division of Community & Rural Development
1201 Main Street, Suite 1600
Columbia, SC 29201
Phone: (803) 737-3837 Fax: (803) 737-0538

VIRGINIA

Name of Program: Neighborhood Assistance Program
Conception: 1981
Statute: § 63.2-2000 -- § 63.2-2006
Oversight: Department of Social Services

Tax Credit Amount: 45%
State Credit Limit: \$8 million (\$2.75 million allocated specifically for education programs)
Project Credit Limit: Changes annually, depending upon number of nonprofit applications; the project credit limit for FY 2005 was \$350,000

Minimum Business Donation (Credit): \$889 (\$400)
Maximum Business Donation (Credit): \$388,889 (\$175,000)
Tax Credit Carryover for Businesses: 5 years
Minimum Individual Donation (Credit): \$500 (\$225)
Maximum Individual Donation (Credit): \$111,111.11 (\$50,000)

Tax Credit Carryover for Individuals: 5 years

* As of July 1, 2000, the legislation was expanded to grant tax credits to individuals donating under the program.

** Beginning January 1, 2002, the minimum and maximum donations for individuals were raised to \$900 and \$1666.67, respectively, with a change in tax credit value from 100% to 45% (resulting in a minimum credit of \$405 and maximum credit of \$750). Effective July 1, 2002, the minimum donation was changed to \$500. As of July 1, 2005, the maximum tax credit for cash donations by individuals increased to \$50,000.

Donation Recipients: Nonprofit organizations (specifically those whose primary function is to provide assistance for impoverished people)
Eligible Services: Community services, legal services, education, healthcare services, housing, job training
Eligible Donations: Business donors: cash, stock, goods, professional services, health care services, contracting services, real estate, and leased space
 Individual donors: limited to cash donations

Other: Tax credits are awarded to approved nonprofit organizations, which in turn use the credits as incentives to encourage donations.

Available Statistics:

Fiscal Year	Number of Approved Recipients	Number of Businesses/Individuals Donating	Amount of Credit Awarded*	Amount of Credit Claimed by NPOs	Percent of Credit Claimed*
1997	289	2,204	~\$5.25m	\$4,404,325	83.9%
1998	227	1,312**	~\$5.25m	\$4,021,393	76.6%
1999	226	1,517	~\$5.25m	\$4,605,990	87.7%
2000	206	1,676	***~\$8m	\$5,949,194	74.4%
2001	222	5,020	~\$8m	\$6,849,810	85.6%
2002	235	4,859	\$8m	\$6,297,478	78.7%
2003	251	2,288	\$8m	\$6,286,695	78.6%
2004	255	2,090	\$8m	\$5,851,765	73.1%
2005****	220	1,475	\$8m	\$4,043,892	50.5%

*Program expanded to allow individuals to receive tax credits for cash donations.

**The drop in number of participants after FY96-97 was a result of legislation narrowing the scope of the program and limiting eligibility to nonprofits whose primary function is to provide assistance to impoverished individuals.

***The state credit limit was raised from \$5.25 million to \$8 million.

****As of July 21, 2005

*****Other information available: amount of donation and tax credit by business type, amount of donation and tax credit by donation type.

Website: <http://www.dss.virginia.gov/business/nap.html>

Contact: Maggie Wilson, Program Administrator maggie.wilson@dss.virginia.gov
Neighborhood Assistance Program
Office of Community Services
Virginia Department of Social Services
7 North Eighth Street, 3rd Floor
Richmond, VA 23219-3301
Phone: (804) 726-7923 Fax: (804) 726-7946

CONNECTICUT

Name of Program: R.E. Van Norstrand Neighborhood Assistance Act Program
Conception: 1982
Statute: Chapter 228a, §12.630-638
Oversight: Department of Revenue Services

Tax Credit Amount: 60%
State Credit Limit: \$5 million (\$3 million set aside for energy conservation, job training and programs serving low-income persons)
Project Credit Limit: No one entity shall be entitled to receive an aggregate amount of funding in excess of \$150,000 in any one fiscal year.

Minimum Business Donation (Credit): \$250
Maximum Business Donation (Credit): The maximum credit allowed to any business firm is \$75,000 annually and the maximum credit allowed in the aggregate to all business firms is \$5 million in any one fiscal year.

Tax Credit Carryover for Businesses: 2 year carryback

Donation Recipients: Nonprofit organizations, government organizations
Eligible Services: Childcare programs, community based alcoholism prevention or treatment programs, community services, crime prevention, education, health services, energy conservation, housing, job training, neighborhood assistance
Eligible Donations: Cash

Available Statistics:

	2000	2001	2002	2003	2004
Total number of approved business applications	832	474	453	386	371
Total number of participating businesses	441	241	205	206	202
Total number of participating organizations	368	390	376	376	339
Total number of approved programs	640	675	611	577	481
Total amount of donations to approved programs	\$6,043,236	\$4,087,528	\$3,589,583	\$4,456,929	\$3,520,110
Total amount of credit granted	\$3,332,144	\$2,326,712	\$2,640,996	\$2,674,157	\$2,112,066

Website: www.drs.state.ct.us

Contact: Susan Sherman, Legislative Program Manager
 Department of Revenue Services
 Research Unit
 25 Sigourney Street
 Hartford, CT 06106
 Phone: (860) 297-5687

Fax: (860) 297-5729

DELAWARE

Name of Program: Neighborhood Assistance Tax Credit
Conception: 1972/1999 (From 1972-1999, the Delaware Neighborhood Assistance Tax Deduction offered a 100% tax deduction of up to 5% of a corporation's income tax. As of June 30, 1999, the act was replaced with the Neighborhood Assistance Tax Credit, which allows a 50% tax credit on approved charitable donations to community-based organizations)

Statute: Title 30 Chapter 20 Delaware Code §§ 2001-2006. Rulemaking to be completed October 2002.

Oversight: Economic Development Office, Tax Appeal Board

Tax Credit Amount: 50%
State Credit Limit: \$500,000
Project Credit Limit: None

Minimum Business Donation (Credit): None
Maximum Business Donation (Credit): \$200,000 (\$100,000)
Tax Credit Carryover for Businesses: 5 years

Donation Recipients: Nonprofit organizations (specifically, community development corporations, community based organizations, and neighborhood organizations whose board consists of at least 51% of its members being part of the neighborhood or community), approved businesses

Eligible Services: Community services, crime prevention, education, healthcare services, housing, job training, neighborhood assistance, economic development

Eligible Donations: Cash, property, goods and services, technical assistance, stocks and bonds

Other: Programs within designated "impoverished areas;" creation of a Neighborhood Advisory Council, composed of representatives from both the public and private sectors, to provide guidance and recommendations to the Economic Development Office and Tax Appeal Board.

Available Statistics: Rulemaking for 1999 revisions to be completed October 2002. Under the previous program, only one company took advantage of the tax deduction. In 2005 two projects were approved for a total of \$45,000 for an existing business program.

Website: www.state.de.us/dedo

Contact: Barbara Rodgers
Delaware Economic Development Office
99 Kings Highway
Dover, DE 19901-7305
Phone: (302) 672-6828
Barbara.Rodgers@state.de.us
Fax: (302) 739-5749

FLORIDA

Name of Program: Community Contribution Tax Credit Program (CCTCP)
Conception: 1980
Statute: §§220.183, 624.5105, 212.08 (5) (q)
Oversight: Office of Tourism, Trade, and Economic Development

Tax Credit Amount: 50%
State Credit Limit: \$12 million (The state will reserve \$9.4 million of the credits for projects that provide homeownership opportunities for low-income persons)

Project Credit Limit: None

Minimum Business Donation (Credit): None
Maximum Business Donation (Credit): \$400,000 (\$200,000)
Tax Credit Carryover for Businesses 5 years

Donation Recipients: Nonprofit organizations (specifically community based development organizations), government organizations
Eligible Services: Community development projects, housing, job training, neighborhood development, and entrepreneurial development
Eligible Donations: Cash, property, goods, stocks and bonds

Other: Designated enterprise zones and Front Porch Florida Communities for community development projects (however, housing projects can be outside of EZ); businesses can donate to more than one project; contributions exclusively reserved for projects.

Available Statistics:

	FY 2002/2003			FY 2003/2004			FY 2004/2005		
	# Projects	# Donations	Tax Credits*	# Projects	# Donations	Tax Credits*	# Projects	# Donations	Tax Credits*
Project Areas:									
Community Development in EZ	22	79	\$1,085,544	9	51	\$1,377,231	5	51	\$1,948,382
Low-Income Housing in an EZ	2	67	\$2,236,786	2	45	\$1,570,529	3	34	\$1,349,250
Low-Income Housing not in an EZ	27	213	\$6,677,670	21	189	\$7,052,240	21	166	\$6,702,368
Total	51	359	\$10,000,000	32	285	\$10,000,000	29	251	\$10,000,000

* Tax credits awarded.

Website: <http://www.myflorida.com/myflorida/government/governorinitiatives/otted/>

Contact: Burt Von Hoff, Community Development Liaison burt.vonhoff@myflorida.com
 Executive Office of the Governor
 Office of Tourism, Trade, and Economic Development
 The Capitol, Suite 2001
 Tallahassee, FL 32399-0001
 Phone: (850) 487-0467 Fax: (850) 487-3014

ILLINOIS

Name of Program: Illinois Affordable Housing Tax Credit
Conception: 2001
Statute: Public Act 92-0491
Oversight: Illinois Housing Development Authority

Tax Credit Amount: Up to 50% tax credit
State Credit Limit: \$13m; increases by 5% for remaining four years
Project Credit Limit: None

Minimum Business Donation (Credit): \$10,000
Maximum Business Donation (Credit): None
Tax Credit Carryover for Businesses: Credit must be taken in one year; may be carried forward for up to five years if tax liability is insufficient

Donation Recipients: Nonprofit housing developers and CDC sponsors of affordable housing
Eligible Services: Rental and single family housing for very low income; employer assisted housing, technical assistance (including counseling), operating support
Eligible Donations: Money, securities, real and personal property

Other: Tied to income targets; City of Chicago has set-aside allocation

Available Statistics: Earlier Illinois legislation was not effective. 2001 revisions add new dimension to the program. Rulemaking has been completed.

Website: www.ihda.org/multifamilyfinancing/housingcredits

Contact: Charlotte Flickinger, Director of Tax Credits
Illinois Housing Development Authority
401 N. Michigan Avenue, Suite 900
Chicago, IL 60611
Phone: (312) 836-5240

Fax: (312) 832-2175

INDIANA

Name of Program: Neighborhood Assistance Program
Conception: 1984
Statute: § 6-3.1-9
Oversight: Indiana Housing and Community Development Authority

Tax Credit Amount: 50% of the contribution amount
State Credit Limit: \$2.5 million annually
Project Credit Limit: \$50,000 in tax credits per organization

Minimum Business/Individual Donation (Credit): \$100.00 (\$50.00 in tax credits)
Maximum Business/Individual Donation (Credit): \$50,000.00 (\$25,000.00 in tax credits)
Tax Credit Carryover for Businesses/Individuals: None

Donation Recipients: A business firm or a person who contributes to a neighborhood organization that is providing eligible services

Eligible Services: Community services (counseling, emergency assistance, medical care, recreational facilities, housing facilities, or economic development assistance), education, job training

Eligible Donations: Cash, check, credit card, stock that has been sold, land, or building materials

Other: NAP tax credits are offered annually for distribution by approved 501 (c) (3) not-for-profit corporations following the state fiscal year from July 1 to June 30. Organizations utilize the tax credits as incentives to encourage donations for certain neighborhood based activities. NAP tax credits are then subtracted from the donor's state income tax liability.

Available Statistics:

- 668 organizations awarded from 1997-1998 FY through 2005-2006 FY
- 138 applications received and 67 funded for 2005-2006 fiscal year
- Funding rate has been approximately 50% for several years (48% in 05-06 FY)
- Average tax credit award for 05-06 FY = \$37,313.43
- Activities funded in 05-06 (*Projects may encompass multiple activities; therefore calculations may count an organization more than one time*):

19 counseling, 9 child care, 9 medical care, 8 affordable housing, 8 emergency food assistance, 8 emergency shelter, 5 job training, 5 recreational facilities, 2 downtown revitalization, and 2 educational assistance.

Website: www.indianahousing.org under the subheading "Helping Communities"

Contact: Shazia Davis sdavis@ihfa.state.in.us
Allocation Analyst
Indiana Housing and Community Development Authority
30 South Meridian, Suite 1000
Indianapolis, IN 46204
Phone: (800) 872-0371; (317) 232-7777 Fax: (317) 232-7778

KANSAS

Name of Program: Kansas Community Services Program
Conception: 1994
Statute: §§79.32.194-199
Oversight: Department of Commerce

Tax Credit Amount: 50%, 70% (50% tax credit for projects in those rural areas with greater than 15,000 people; 70% tax credit for projects in areas containing less than 15,000 people)
State Credit Limit: \$4.1 million
Project Credit Limit: \$250,000 (50%), \$350,000 (70%)

Minimum Business Donation (Credits): \$250 (\$125, \$175)
Maximum Business Donation (Credits): None
Tax Credit Carryover: None

Minimum Individual* Donation (Credits): \$250 (\$125, \$175)
Maximum Individual* Donation (Credits): None
 * As of July 1, 2001, individuals will be allowed to donate money in the Kansas Community Services Program.

Donation Recipients: Nonprofit organizations (specifically community service organizations), government organizations
Eligible Services: Community services (employment, food, housing, emergency assistance), crime prevention, healthcare services
Eligible Donations: Cash, property, goods and services, technical assistance, stocks and bonds

Other: Tax credits are awarded to approved nonprofit organizations, which in turn use the credits as incentives to encourage donations.

Available Statistics:

Year	# of Projects	# Businesses Applying for Credit	Tax Credits Awarded to Projects	Tax Credits Claimed by Projects	% Tax Credit Claimed
1999	30	995	\$5,000,000	\$3,575,293	71.5%
2000	29	961	\$5,000,000	\$4,135,356	82.7%
2001	26	1,114	\$4,130,000	\$4,105,449	99.0%
2002	28	1,231	\$4,130,000	\$4,130,000	100.0%
2003	29	1,711	\$4,130,000	\$4,130,000	100.0%
2004	27	1,647	\$4,130,000	\$4,130,000	100.0%

*Other information available: breakdown of credits by project.

KANSAS
(continued)

Website: <http://kansascommerce.com/>

Contact: **J.R. Robl, Program Manager**
Community Service Program
Kansas Department of Commerce and Housing
Community Development Division
1000 SW Jackson, Suite 100
Topeka, KS 66612-1354
Phone: (785) 296-3485

Fax: (785) 296-0186

LOUISIANA

Name of Program: Neighborhood Assistance Tax Credit
Conception: 1982
Statute: R.S. 47:35, R.S. 47:287.753
Oversight: Department of Revenue, Commissioner of Administration

Tax Credit Amount: Up to 70%
State Credit Limit: 1% of the corporation income tax of the previous fiscal year
Project Credit Limit: None

Minimum Business Donation (Credit): None
Maximum Business Donation (Credit): \$357,142 (\$250,000)
Tax Credit Carryover for Businesses: 5 years

Donation Recipients: Nonprofit organizations (neighborhood organizations), businesses administering neighborhood assistance projects

Eligible Services: Community services (counseling, emergency assistance, medical care), crime prevention, education, job training, neighborhood assistance

Eligible Donations: Cash, goods and services, technical assistance, stocks and bonds

Other: Tax credit must be approved by the local municipality, the Commissioner of Administration, and the Secretary of Revenue.

Available Statistics: N/A

Comments: Program is not funded at this time.

Website: N/A

Contact: N/A

MARYLAND

Name of Program: Community Investment Tax Credit
Conception: 1996
Statute: Title 5 Subtitle 14.01-13
Oversight: Department of Neighborhood Revitalization
Tax Credit Amount: 50%
State Credit Limit: \$1 million
Project Credit Limit: Initial limit of \$50,000, but can request extra funding

Minimum Business Donation (Credit): \$500 (\$250)
Maximum Business Donation (Credit): \$250,000 (\$125,000)
Tax Credit Carryover for Businesses: 5 years

Donation Recipients: 501 (c) (3) organizations
Eligible Services: Community services (including education and youth services, housing and community development job and self-sufficiency training, enhancing neighborhoods and business districts, arts, culture and historic preservation, technical assistance and capacity building and services for at-risk populations)
Eligible Donations: Cash, goods and stock.

Other: Tax credits are awarded to approved projects, which in turn use the credits as incentives to encourage contributions. Awards will be made to projects which either are located within or primarily serve residents of "priority funding areas."

Available Statistics: In Maryland, the nonprofits market the credits for capital projects or a service for at least two years. The organizations may request supplemental allocations of credits based on their track record and documentation of need. [The supplemental allocations for strong performers come from a pool of credits recaptured --after two or more years-- from non-performers.]

Year	# of Projects	# Businesses Applying for Credit	Tax Credits Awarded to Projects	Tax Credits Sold by Projects	% Tax Credit Claimed
1999	23	66	\$1,000,000	\$845,069	Data not Available
2000	34	114	\$998,884	\$921,011	Data not Available
2001	21	41	\$995,897	\$731,143	Data not Available
2002	40	138	\$960,000	\$650,899	Data not Available
2003 *	34	131	\$997,815	\$608,086	Data not Available
2004 *	49	117	\$1,000,000	\$285,402	Data not Available
2005 *	31	Pending	\$981,000.00	\$41,750.00	Data not Available

*To date, i.e., many of these projects are still actively marketing credits.

Website: <http://www.dhcd.state.md.us/website/programs/cite/cite.aspx>

Contact: Mitra Basu basu@dhcd.state.md.us
 Project Manager
 Division of Neighborhood Revitalization
 Maryland Department of Housing and Community Development
 100 Community Place
 Crownsville, MD 21032
 Phone: (410) 514-7255 Fax: (410) 987-4660

MICHIGAN

Name of Program: Neighborhood Assistance and Participation Act
Conception: 1980
Statute: §125.801-814
Oversight: Department of Labor (no longer in existence)

Tax Credit Amount: 50% Rebate
State Credit Limit: None
Project Credit Limit: None

Minimum Business Donation (Rebate): None
Maximum Business Donation (Rebate): \$100,000 (\$50,000 rebate) for the business's initial donation, increasing in \$100,000 (\$50,000) increments annually until total donation allowed is \$500,000 (\$250,000 Rebate)

Tax Rebate Carryover for Businesses: None

Donation Recipients: Nonprofit organizations (neighborhood organizations and community development commissions)
Eligible Services: Community services (counseling, recreational programs, emergency assistance, medical care), crime prevention, job training, physical revitalization
Eligible Donations: Cash

Other: The program applies to specific neighborhood areas that are considered "deteriorating environments."

Available Statistics: The program has been unfunded since 1982.

Website: N/A

Contact: N/A

MISSOURI

Name of Program: Neighborhood Assistance Program
Conception: 1978
Statute: §32.105-32.125, RSMo.
Oversight: Department of Economic Development

Tax Credit Amount: 50%, 70% (50% tax credit for projects in those areas with greater than 15,000 people; 70% tax credit for projects in areas containing less than 15,000 people)
State Credit Limit: \$18 million
Project Credit Limit: \$250,000 (50%), \$350,000 (70%)

Minimum Business Donation (Credit): None
Maximum Business Donation (Credit): \$500,000 (\$250,000, \$350,000)
Tax Credit Carryover for Businesses: 5 years

Donation Recipients: Nonprofit organizations, businesses administering neighborhood assistance projects
Eligible Services: Community services (counseling, mental health services, primary care services, child and adult day care centers, emergency assistance, substance abuse counseling, individual development accounts), crime prevention, education, job training, physical revitalization
Eligible Donations: Cash, property, goods and services, technical assistance, stocks and bonds
Other: Credits are awarded for projects for use for one, two, or three years.

Available Statistics:

Fiscal Year	Credits Awarded	Credits Issued*
1997	\$17,432,910	\$9,907,595
1998	\$20,597,918	\$10,038,299
1999	\$10,890,096	\$10,425,864
2000	\$17,986,106	\$12,572,577
2001	\$16,806,835	\$10,570,515
2002	\$15,472,826	\$10,543,250
**2003	\$14.8 million	\$12.2 million
**2004	\$14.7 million	\$9.8 million
**2005	\$16 million	\$11.3 million

*The credits issued column indicate figures for the current fiscal year only and not for the total life of the projects (ranging from one to three years).

** Missouri is still issuing credits for projects approved in these years.

Website: <http://www.ded.mo.gov/cd>
Contact: Brenda Horstman brenda.horstman@ded.mo.gov
 Community Development Program Coordinator
 Department of Economic Development
 Harry Truman Office Building, Room 770
 301 W. High Street, Post Office Box 118
 Jefferson City, MO 65102
 Phone: (573) 751- 4539 Fax: (573) 522-4322

NEBRASKA

Name of Program: Community Development Assistance Act (CDAA)
Conception: 1985
Statute: §13-201-208
Oversight: Department of Economic Development
Tax Credit Amount: 40%
State Credit Limit: \$350,000
Project Credit Limit: \$25,000
Targeted Area Credit Limit: \$100,000 ("Targeted Area" defined as an area in which at least 50% of the residents are of a racial minority, 20% of citizens have incomes below poverty level, 70% have incomes less than 80% of the median family income in metropolitan area, and 9% are unemployed)

Minimum Business Donation (Credit): \$100 (\$40)
Maximum Business Donation (Credit): None
Tax Credit Carryover for Businesses: 5 years

Donation Recipients: Nonprofit organizations (specifically, community betterment organizations and community development corporations), government organizations (county, city, and villages discharging community assistance)

Eligible Contributors: Nebraska-based businesses and individuals

Eligible Services: Community services (youth, day care, and senior citizens centers, emergency assistance, counseling, home improvement services, recreational activities), crime prevention, education, human and healthcare services, housing, job training, physical facility and neighborhood development services

Eligible Donations: Cash, property, goods and services, technical assistance, stocks and bonds

Other: Projects must be situated in "chronic economic distress areas," defined by the State Legislature of Nebraska; Tax credits are awarded to approved nonprofit organizations, which in turn use the credits as incentives to encourage donations.

Available Statistics:

Fiscal Year	Number of Projects	Total Tax Credits Awarded to Projects	Total Tax Credits Claimed by Projects	Percent of Credit Claimed
2000	7	\$124,400	\$27,457	--
2001	14	\$250,000	\$138,180	--
2002	14	\$250,000	\$146,825	--
2003*	11	\$219,000	\$182,759	--
2004*	9	\$203,900	\$138,685	--
2005*	11	250,000	\$53,383	--

*As of June 30, 2005 (continued)

Website: <http://crd.neded.org/>
Contact: Dave Miller, CDAA Coordinator email: dave.miller@ded.ne.gov
 Nebraska Department of Economic Development
 Community and Rural Development Division
 301 Centennial Mall South, Post Office Box 94666
 Lincoln, NE 68509-4666
 Phone: (800) 426-6505 or (402) 471-3775 Fax: (402) 471-3778

PENNSYLVANIA

Names of Programs (3): Neighborhood Assistance Program: Neighborhood Assistance Program/Enterprise Zone (EZP): Neighborhood Assistance Program/Comprehensive Service Program (CSP) {replaced by the Neighborhood Partnership Program (NPP), though current CSP's will continue until they lapse}

Conception: 1967 (NAP), 1986 (NAP/EZP), 1995 (NAP/CSP); 2004 (NPP)

Statute: 62 P.S. §§ 2081-2089, 12 Pa. Code §135.1-135.44

Oversight: Department of Community and Economic Development

Tax Credit Amount: 20% (NAP/EZP), 50% (NAP), 70% (NAP/CSP/NPP)

State Credit Limit: \$18 million for all programs

Project Credit Limit: None (NAP), \$250,000 (NAP/EZP), \$175,000 (NAP/CSP/NPP)

Minimum Business Donation (Credit): None

Maximum Business Donation (Credit): NAP: \$500,000 (\$250,000): NAP/EZP: \$1.25 million (\$250,000): NAP/CSP: businesses can donate a maximum of \$250,000 (\$175,000 in credits) per project: two project maximum.

Tax Credit Carryover for Businesses: 5 years

Donation Recipients: Nonprofit organizations, businesses administering neighborhood assistance projects

Eligible Services: NAP: Community services (counseling, emergency assistance, medical care, recreation activities), education, job training, crime prevention, neighborhood assistance
 NAP/EZP: Real property improvements within the enterprise zone: rehabilitation, expansion or physical improvements to land or property owned by the business
 NAP/CSP/NPP: Those projects that serve clients who are low-income residents of economically distressed neighborhoods or that provide community and economic development activities within those neighborhoods: affordable housing programs, education, health and social services, community development, job training, crime prevention, community participation

Eligible Donations: Cash, property, goods and services, technical assistance, stocks

Other: Businesses can donate to more than one project; projects must be executed in designated "impoverished areas" or provide eligible services to clients with family income at or below 150% of the federal poverty guidelines.

Available Statistics:

Fiscal Year	Amount of Credit Awarded to Projects	Amount of Credit Claimed by Projects	Percentage of Credit Distributed
1997	\$10,427,150	\$6,809,139	65.30%
1998	\$10,170,350	\$5,228,600	51.41%
1999	\$8,657,433	\$6,112,372	70.60%
2000	\$9,611,089	N/A	N/A
2001	\$15,481,967	*N/A	N/A

*Includes tax credit awarded to NAP, NAP/EZP and NAP/CSP projects.

Website: www.NewPA.com

Contact: JamesEtta Reed, Chief, Human Resources Division jareed@state.pa.us
 Department of Community and Economic Development
 Center for Community Building, Office of Community Services
 4th Floor, Commonwealth Keystone Building
 Harrisburg, PA 17120-0225
 Phone: (717) 787-1984 Fax: (717) 214-5399

State Neighborhood Assis. Legislation as of August 2005

State	Year	Tax Credit	State Credit Limit	Max Bus. Donation	Max Tax Credit	Cited Eligible Services										Eligible Recipients				Eligible Donations				Carry-over	Other	
						Comm	Crime	Edu	Health/Energy	House	Jobs	Neigh	NPO	Gov't	Cash	Prop	G/S	T/A	S/B	Cash	Prop	G/S	T/A			S/B
Connecticut	1982	60%	\$5m	\$125,000	\$75,000	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	2 yrs	Childcare focus: tax credit carryback
Delaware	1972 Rev. 1999	50%	\$500,000	\$100,000	\$50,000	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Tax abatement to credit in 1999, rulemaking complete 2002
Florida	1980	50%	\$10m	\$400,000	\$200,000	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Enterprise Zones	
Illinois	1993/ Rev. 2001	Up to 50% tax abatement	13m	n/a	varies	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Tied to income targets if used	
Indiana	1984	50%	\$2.5m	\$50,000	\$25,000	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	None	Enterprise zones, Individuals can donate	
Kansas	1994	50%, 70%	\$4.1	none	varies	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	None	Rural/Urban: Individuals can donate	
Louisiana	1982	Up to 70%	1% of annual corporate income tax	\$357,142	\$250,000	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Rarely if ever used	
Maryland	1996	50%	\$1m	\$250,000	\$125,000	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Designated Neighborhood Revitalization Areas	
Michigan	1980	50%	Unlimited	\$250,000	\$125,000	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	None	Unfunded at present time	
Missouri	1978	50%, 70%	\$18m	\$500,000	\$250,000 \$350,000	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Rural/Urban	
Nebraska	1985	40%	\$350,000	none	none	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Chronic Economic Distress Areas	
Pennsylvania	1967	20% EZP, 50% NAP, 70% CSP	\$18m	\$1.25m (EZP), \$250,000 (EZP), \$500,000 (NAP), \$350,000 (NAP), \$500,000 (CSP each project) (\$175,000 projects)	\$250,000 (EZP), \$250,000 (EZP), \$500,000 (NAP), \$350,000 (NAP), \$500,000 (CSP each project) (\$175,000 projects)	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	3 programs: NAP, Enterprise Zone (EZP), Comprehensive Service (CSP)	
South Carolina	2000	33%	\$1m	none	none	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	10 yrs	Individuals can donate		
Virginia	1981	45%	\$8m	\$388,889	\$175,000	X	X	X ^H	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	5 yrs	Individuals can donate	
West Virginia	1996	50%	\$2m	\$200,000	\$100,000	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	None	"Economically Disadvantaged Area"	

G/S = goods & services
T/A = technical assistance
S/B = stocks & bonds
X^H = healthcare services only
X = stocks only
* Oregon does not have specific neighborhood assistance legislation; however, several of the state's tax credit programs promote community development.



City of Milwaukee

200 E. Wells Street
Milwaukee, Wisconsin 53202

Text File

Resolution

Introduced: 5/9/2006

File Number: 060071

Status: Passed

Version: 3

Sponsors: Ald. Murphy, Ald. McGee Jr., Ald. D'Amato, Ald. Bauman, Ald. Hines Jr., Ald. Wade
And Ald. Witkowiak

..Number

060071

..Version

SUBSTITUTE 3

..Reference

051017

..Sponsor

ALD. MURPHY, MCGEE AND D'AMATO

..Title

Substitute resolution relating to the recommendations of the Milwaukee Housing Trust Fund Task Force for the operation and funding of a housing trust fund.

..Analysis

This resolution endorses, with certain modifications, the recommendations contained in the Milwaukee Housing Trust Fund Task Force's Final Report dated June, 2006, related to the establishment, operation and funding of a housing trust fund. This resolution also directs the Common Council's Legislative Reference Bureau and the appropriate City officials to draft additional legislation necessary for further Common Council action to implement the endorsed recommendations, including but not limited to an ordinance establishing a housing trust fund and provisions related to its operation and funding. The Task Force shall be dissolved upon Common Council action on this resolution, in accordance with File Number 060069, adopted May 31, 2006.

..Body

Whereas, On December 13, 2005, the Common Council adopted File Number 051017, a resolution establishing a 13-member Affordable Housing Trust Fund Task Force to evaluate and make recommendations relating to the structure, goals, strategies, financial resources and programs for a City of Milwaukee Housing Trust Fund; and

Whereas, The Task Force was given 180 days (until June 13, 2006) to submit its findings and recommendations to the Common Council, and this deadline was later extended to July 31, 2006, by File Number 060069, adopted May 31, 2006; and

Whereas, The Task Force submitted its Final Report and Recommendations to the Common Council in June, 2006, under File Number 060070, a communication transmitting the Final Report and Recommendations of the Housing Trust Fund Task Force; and



Whereas, The report was given a public hearing under the communication file by the Common Council's Zoning, Neighborhoods and Development Committee on July 7, 2006; and

Whereas, The recommendations of the Housing Trust Fund Task Force were as follows:

Financing the Housing Trust Fund

1. The Housing Trust Fund should be funded at a minimum level of \$5 million annually.
2. The City shall issue up to \$5 million in general obligation bonds to fund the Housing Trust Fund in its first year of operation, with debt service being funded by the property tax levy. These bonds should be issued in such a manner that it is clear that bond-sale proceeds will be used for a purpose for which the City would be exempt from the requirement to hold a referendum on the bond sale, as provided in the Wisconsin Statutes. This bond sale should be viewed as a one-time commitment intended to provide start-up funding for the Housing Trust Fund. It is anticipated that funding from other revenue sources, including those for which changes in state legislation are necessary, will provide the funding needed for the Housing Trust Fund in the second and subsequent years.

Assuming a 15-year term and an interest rate of 5%, annual debt service payments for this \$5 million bond issuance would range from \$350,000 to \$583,333.

3. If future City payments from the Potawatomi Bingo Casino exceed the current amount of \$3.38 million per year, the additional revenues shall be dedicated for the Housing Trust Fund. If the casino is expanded, payments to the City could increase by \$2 million to \$4 million.
4. When a tax incremental district is closed, for each of the 4 years immediately following the year in which closure occurred, the City shall designate General Fund revenue for the Housing Trust Fund in an amount equal to the incremental tax revenue (City portion) received from the TID during the last tax collection cycle in which the tax incremental district was in existence. Thus, for any year in the future - 2010, for example -- the total funds generated for the Housing Trust Fund for that year would be the final-year tax increment (City portion) for all TIDs that were closed in the preceding 4 years (in this case, TIDs that closed in 2006, 2007, 2008 and 2009).

Based on TID-closure years anticipated by the Department of City Development and the Comptroller's projection of the City tax increment from each tax incremental district in the TID-closure year, this option could generate the following revenues for the Housing Trust Fund over the next 10 years:

2007	\$2,674,900
2008	\$3,115,000
2009	\$3,431,800
2010	\$3,684,500
2011	\$1,068,100
2012	\$628,000

2013	\$1,741,300
2014	\$1,712,800
2015	\$1,890,400
2016	\$2,869,400

Note: In developing these projections, the Comptroller's Office assumed that no new TIDs will be created and closed within the 10-year period, that equalized values of TIDs will increase 8% per year over the 2005 equalized value and that the City tax rate will continue to decrease until 2011, after which time it will level off.

5. 80% of the net proceeds from the sale of City-owned vacant land should be designated for the Housing Trust Fund. The remaining 20% would continue to go to the Redevelopment Authority for its administration of the land-sale program. Based on actual City land-sale proceeds over the past 5 years, it appears that this option could generate \$132,000-\$275,000 for the Housing Trust Fund each year.

6. Any payments in lieu of taxes ("PILOTs") received by the City from newly-negotiated PILOT agreements with owners of tax-exempt property should be dedicated for the Housing Trust Fund. Based on recent experience, PILOTs could generate \$20,000-\$27,000 per year for the Housing Trust Fund.

7. The City, through appropriate Common Council resolutions and the efforts of the Department of Administration-Intergovernmental Relations Division, should seek introduction and passage of state legislation that would:

- Allow revenues from tax incremental districts to be used for housing trust fund purposes outside those districts.
- Allow municipalities to assess linkage fees in the range of 10 to 30 basis points per square foot of new construction (both residential and non-residential), with the proceeds from such fees available to support local housing trust funds.
- Create a 50% state tax credit for contributions to housing trust funds.
- Enable municipalities and counties to levy taxes and fees that solely support housing trust funds. Such taxes and fees should be exempt from state-imposed revenue caps or tax-levy freezes.
- Create a State of Wisconsin housing trust fund to be funded, at least in part, by real estate transfer fee proceeds, with no funds coming from local governments. Specifically, this housing trust fund should be funded by 5% of the real estate transfer fee revenues (i.e., the share of transfer fee revenues retained by the State for other purposes would be reduced from 80% to 75%).
- Increase the amount of the real estate transfer fee statewide from \$3 per \$1,000 of sale price to \$4 per \$1,000, with the increased revenues being dedicated to the state housing trust fund (if one is created) or to local housing trust funds (if no state housing trust fund is created).
- Eliminate the exemption from the requirement to pay the real estate transfer fee that currently applies to transfers involving purchasers that are limited liability companies ("LLCs"), with the additional transfer fee revenues being dedicated to the state housing trust fund or, if no state fund is created, to local housing trust funds.

Operation of the Housing Trust Fund

1. The Housing Trust Fund should be administered by the Community Development Grants Administration Division of the City's Department of Administration. If this agency is unable or unwilling to assume this responsibility, the Department of City Development/Neighborhood Improvement Development Corporation should administer the program. A third, but less-preferred, option would be to have a private, non-profit agency administer the Trust Fund.

While the Housing Trust Fund would be administered by Community Development Grants Administration, requests-for-proposals, public hearings and funding-allocation decisions should be kept separate from the City's CDBG activities.

2. Oversight of administration of the Housing Trust Fund, as well as final funding recommendations to the Common Council, should be provided by a 13-member advisory board consisting of the following members, who shall serve staggered, 2-year terms:

- Two Common Council members (appointed by the Common Council President)
- Two members to be appointed by the Mayor
- The City Comptroller or his/her designee
- A non-profit developer (appointed by the Common Council President)
- A for-profit developer (appointed by the Common Council President)
- A representative of Continuum of Care
- A representative of a financial institution (appointed by the Common Council President)
- A representative of the Local Initiatives Support Corporation
- A representative of the Metropolitan Milwaukee Fair Housing Council
- A representative of Independence First
- A representative of the Interfaith Conference of Greater Milwaukee

(For advisory board members where no appointing authority is specified, the agency which the individual represents shall make the appointment.)

The board should be responsible for evaluating requests for funding from the Housing Trust Fund (after those requests have been submitted to and reviewed by the administering agency). In making funding-allocation decisions, the board should consider a report on Milwaukee's housing needs that is prepared annually by the Community Development Grants Administration Division and the Department of City Development.

3. A minimum of 25% of Housing Trust Fund dollars should be used to develop housing and provide services for people who are homeless. A minimum of 35% should be used to develop or rehabilitate rental housing. A minimum of 25% should be used to create and maintain home ownership opportunities. The remainder of the Fund (15% or less) should be set aside for "flexible" use to respond to whatever housing needs the advisory board identifies, subject to the income-eligibility requirements of items #7 and #8. In any of these categories, Housing Trust Fund dollars may be used to fund accessibility or visitability improvements or modifications. Each year, at least 2% of available Housing Trust Fund dollars or \$100,000, whichever is less, should be used to fund accessibility improvements or modifications in any of the 3 funding

categories (homeless, rental and home ownership).

For all projects financed by the Housing Trust Fund, Trust Fund dollars should be used to leverage and complement other sources of financing and to close funding gaps, but should not be viewed as the primary source of funds for the project.

4. Rental housing which is supported by the Housing Trust Fund shall remain affordable for a minimum of 30 years, with a review of the affordability requirement at 15 years. The advisory board shall have discretion to remove a particular housing development from the Housing Trust Fund program at the time of the 15-year review.

5. For acquisition, new construction or rehabilitation of an owner-occupied dwelling, a Housing Trust Fund loan should be forgiven if the owner lives in the home for at least 5 years. The requirement to live in the home for at least 5 years could be imposed through a deed restriction. If the owner sells the home before the end of the 5-year period, the owner would be required to reimburse the Housing Trust Fund the entire loan amount unless the property is sold to another income-eligible household.

6. For housing for the homeless, the period of affordability should be 50 years.

7. Financial assistance from the Housing Trust Fund for acquisition or new construction of owner-occupied housing should be limited to households with incomes at or below 100% of the County Median Income (currently \$67,200 for a family of 4), where "income" is as defined on the Census Bureau's Long Form. For homeowners seeking financial assistance for rehabilitation projects, household income should be limited to 65% of County Median Income (currently \$43,680) for substantial work (e.g., work valued at more than \$5,000) and 100% of County Median Income for more modest projects (e.g., work valued at \$5,000 or less). The dollar values of these income limits will, naturally, be adjusted over time as County Median Income changes.

8. Housing Trust Fund assistance for rental housing and projects for the homeless (acquisition, new construction or rehabilitation) should be limited to projects that serve households and individuals at or below 50% of the County Median Income (currently \$33,600).

9. Housing Trust Fund dollars should be available for home-buying counseling, but agencies providing counseling should be required to demonstrate that they serve low- and moderate-income clients. Also, any organization that receives Housing Trust Fund money for this purpose should be required to prove that it has the ability to assist disabled individuals needing counseling (e.g., the organization offers translation services, materials in Braille, etc.).

10. The advisory board should give weighted consideration to an application for Housing Trust Fund assistance if the proposed project will:

- Leverage other funds (private and/or public).
- Serve the lowest-income segment of the population.
- Extend the term of affordability beyond the minimum required by the Housing Trust Fund.
- Use workers from the neighborhood and/or give priority to emerging business enterprise

contractors.

- Encourage more neighborhood diversity and increase housing choices within the neighborhood.
- Use green building principles.
- Coordinate with and enhance the work of other entities in the neighborhood, such as employers, business improvement districts, schools, job training agencies or social service agencies.
- Facilitate the movement of persons from institutions into the community.
- Use contractors who pay family-supporting wages.

11. The following accessibility standards shall apply to all new construction or substantial rehabilitation of housing supported by Housing Trust Fund dollars:

- Section 504 of the Rehabilitation Act of 1973.
- Fair Housing Act as amended.
- Americans with Disabilities Act (with respect to marketing-office and common areas).
- Wisconsin Open Housing Act.
- Architectural Barriers Act.
- The design principles of any one of the following:
 - "Aging in place".
 - "Universal design".
 - Any other accessible and/or adaptable design criteria approved by the Housing Trust Fund's advisory board.
- For new housing units in one- to 3-unit structures, each ground-floor unit shall be constructed to the following "visitability" standards:
 - One zero-step entrance to the dwelling unit that will permit a visitor using a wheelchair to enter the main-level floor of the dwelling unit through a doorway entrance that has a minimum 32" clear passage opening.
 - A usable path of travel throughout the interior main-level floor of the dwelling unit that is no narrower than 36" at any point except for interior doorway openings with a minimum 32" clear passage opening.
 - A powder room (half bath) on the main-level floor that has: 1) a doorway entrance with a minimum 32" clear passage opening; 2) sufficient space to close the entrance door while the room is occupied; 3) a minimum 30" by 48" floor space clearance; 4) reinforced walls for future installation of grab bars to provide access to the toilet if necessary.
- Any of these standards (except standards imposed by federal or state law) may be waived or reduced by the Housing Trust Fund's advisory board, upon consultation with appropriate City staff, if project site conditions are unsuitable, but any such waiver does not exempt the project from all other applicable requirements regarding accessibility and visitability.

; and

Whereas, Implementation of any of the recommendations contained in the Task Force's Final Report will require endorsement and implementation by the Common Council via appropriate legislation, including ordinances, resolutions and budget amendments; now, therefore, be it

Resolved, By the Common Council of the City of Milwaukee, that the Common Council endorses the following structure and strategies for the financing and operation of the City of Milwaukee Housing Trust Fund:

Financing the Housing Trust Fund

1. The Housing Trust Fund should be funded at a minimum level of \$5 million annually.
2. The City shall issue up to \$5 million in general obligation bonds to fund the Housing Trust Fund in its first year of operation, with debt service being funded first by the additional Potawatomi Bingo Casino revenues and tax incremental district revenues described in numbers 3 and 4 below and secondarily by the property tax levy. Bonds shall be issued as bond-funded projects are approved by the Common Council. These bonds shall be issued in such a manner that it is clear that bond-sale proceeds will be used for a purpose for which the City would be exempt from the requirement to hold a referendum on the bond sale, as provided in the Wisconsin Statutes. This bond sale should be viewed as a one-time commitment intended to provide start-up funding for the Housing Trust Fund.
3. If future City payments from the Potawatomi Bingo Casino exceed the current amount of \$3.38 million per year, 50% of the additional revenues shall be dedicated for the Housing Trust Fund.
4. When a tax incremental district is closed, for each of the 2 years immediately following the year in which closure occurred, the City shall designate General Fund revenue for the Housing Trust Fund in an amount equal to one-half the incremental tax revenue (City portion) received from the TID during the last tax collection cycle in which the tax incremental district was in existence. Thus, for any year in the future - 2010, for example -- the total funds generated for the Housing Trust Fund for that year would be one-half the final-year tax increment (City portion) for all TIDs that were closed in the preceding 2 years (in this case, TIDs that closed in 2006, 2007, 2008 and 2009).

Based on TID-closure years anticipated by the Department of City Development and the Comptroller's projection of the City tax increment from each tax incremental district in the TID-closure year, this option could generate the following revenues for the Housing Trust Fund over the next 10 years:

2007	\$1,337,450
2008	\$1,557,500
2009	\$378,450
2010	\$284,750
2011	\$155,600
2012	\$29,250
2013	\$715,050
2014	\$827,150
2015	\$230,150
2016	\$607,550

5. Any payments in lieu of taxes ("PILOTS") received by the City from newly-negotiated PILOT agreements with owners of tax-exempt property shall be dedicated for the Housing Trust Fund, if so designated by the property owner.

6. The City, through appropriate Common Council resolutions and the efforts of the Department of Administration-Intergovernmental Relations Division, shall seek introduction and passage of state legislation that would:

- Allow revenues from tax incremental districts to be used for housing trust fund purposes outside those districts.
- Allow municipalities to assess linkage fees in the range of 10 to 30 basis points per square foot of new construction (both residential and non-residential), with the proceeds from such fees available to support local housing trust funds.
- Create a 50% state tax credit for contributions to housing trust funds.
- Enable municipalities and counties to levy taxes and fees that solely support housing trust funds. Such taxes and fees should be exempt from state-imposed revenue caps or tax-levy freezes.
- Create a State of Wisconsin housing trust fund to be funded, at least in part, by real estate transfer fee proceeds, with no funds coming from local governments. Specifically, this housing trust fund should be funded by 5% of the real estate transfer fee revenues (i.e., the share of transfer fee revenues retained by the State for other purposes would be reduced from 80% to 75%).
- Increase the amount of the real estate transfer fee statewide from \$3 per \$1,000 of sale price to \$4 per \$1,000, with the increased revenues being dedicated to the state housing trust fund (if one is created) or to local housing trust funds (if no state housing trust fund is created).
- Eliminate the exemption from the requirement to pay the real estate transfer fee that currently applies to transfers involving purchasers that are limited liability companies ("LLCs"), with the additional transfer fee revenues being dedicated to the state housing trust fund or, if no state fund is created, to local housing trust funds.

Operation of the Housing Trust Fund

1. The Housing Trust Fund shall be administered by the Community Development Grants Administration Division of the City's Department of Administration. While the Housing Trust Fund would be administered by this office, requests-for-proposals, public hearings and funding-allocation decisions shall be kept separate from the City's CDBG activities.

2. A Housing Trust Fund Advisory Board shall be established to make project funding recommendations to the Common Council for approval. The 13-member Advisory Board shall consist of the following members, who shall serve staggered, 2-year terms:

- Two Common Council members (appointed by the Common Council President)
- Two members to be appointed by the Mayor
- The City Comptroller or his/her designee
- A non-profit developer (appointed by the Common Council President)
- A for-profit developer (appointed by the Common Council President)

- A representative of Continuum of Care
- A representative of a financial institution (appointed by the Common Council President)
- A representative of the Local Initiatives Support Corporation
- A representative of the Metropolitan Milwaukee Fair Housing Council
- A representative of Independence First
- A representative of the Interfaith Conference of Greater Milwaukee

(For advisory board members where no appointing authority is specified, the agency which the individual represents shall make the appointment.)

The Advisory Board shall be responsible for evaluating requests for funding from the Housing Trust Fund (after those requests have been submitted to and reviewed by the administering agency). In making funding-allocation recommendations, the board shall consider a report on Milwaukee's housing needs that is prepared annually by the Community Development Grants Administration Division and the Department of City Development.

3. A minimum of 25% of Housing Trust Fund dollars shall be used to develop housing and provide services for people who are homeless. A minimum of 35% shall be used to develop or rehabilitate rental housing. A minimum of 25% shall be used to create and maintain home ownership opportunities. The remainder of the Fund (15% or less) shall be set aside for "flexible" use to respond to whatever housing needs the advisory board identifies, subject to the income-eligibility requirements of items #7 and #8. In any of these categories, Housing Trust Fund dollars may be used to fund accessibility or visitability improvements or modifications. Each year, at least 2% of available Housing Trust Fund dollars or \$100,000, whichever is less, shall be used to fund accessibility improvements or modifications in any of the 3 funding categories (homeless, rental and home ownership).

For all projects financed by the Housing Trust Fund, Trust Fund dollars shall be used to leverage and complement other sources of financing and to close funding gaps. The Trust Fund should not be viewed as the primary source of funds for the project.

4. Rental housing which is supported by the Housing Trust Fund shall remain affordable for a minimum of 30 years, with a review of the affordability requirement at 15 years. The Common Council shall have discretion to remove a particular housing development from the Housing Trust Fund program at the time of the 15-year review.

5. For acquisition, new construction or rehabilitation of an owner-occupied dwelling, a Housing Trust Fund loan shall be forgiven if the owner lives in the home for at least 5 years. The requirement to live in the home for at least 5 years may be imposed through a deed restriction. If the owner sells the home before the end of the 5-year period, the owner shall be required to reimburse the Housing Trust Fund the entire loan amount unless the property is sold to another income-eligible household.

6. For housing for the homeless, the period of affordability shall be 50 years, with a review of the affordability requirement at 15 years and 30 years. The Common Council shall have discretion to remove a particular housing development from the Housing Trust Fund program at the time of the 15-year review or the 30-year review.

7. Financial assistance from the Housing Trust Fund for acquisition or new construction of owner-occupied housing shall be limited to households with incomes at or below 100% of the County Median Income (currently \$67,200 for a family of 4), where "income" is as defined on the Census Bureau's Long Form. For homeowners seeking financial assistance for rehabilitation projects, household income shall be limited to 65% of County Median Income (currently \$43,680) for substantial work (e.g., work valued at more than \$5,000) and 100% of County Median Income for more modest projects (e.g., work valued at \$5,000 or less). The dollar values of these income limits shall be adjusted over time as County Median Income changes.

8. Housing Trust Fund assistance for rental housing and projects for the homeless (acquisition, new construction or rehabilitation) shall be limited to projects that serve households and individuals at or below 50% of the County Median Income (currently \$33,600).

9. Housing Trust Fund dollars shall be available for home-buying counseling, but agencies providing counseling shall be required to demonstrate that they serve low- and moderate-income clients. Also, any organization that receives Housing Trust Fund money for this purpose shall be required to prove that it has the ability to assist disabled individuals needing counseling (e.g., the organization offers translation services, materials in Braille, etc.).

10. The Advisory Board shall give weighted consideration to an application for Housing Trust Fund assistance if the proposed project will:

- Leverage other funds (private and/or public).
- Serve the lowest-income segment of the population.
- Extend the term of affordability beyond the minimum required by the Housing Trust Fund.
- Use workers from the neighborhood and/or give priority to emerging business enterprise contractors.
- Encourage more neighborhood diversity and increase housing choices within the neighborhood.
- Use green building principles.
- Coordinate with and enhance the work of other entities in the neighborhood, such as employers, business improvement districts, schools, job training agencies or social service agencies.
- Facilitate the movement of persons from institutions into the community.
- Use contractors who pay family-supporting wages.
- Be taxable.

11. The following accessibility standards shall apply to all new construction or substantial rehabilitation of housing supported by Housing Trust Fund dollars:

- Section 504 of the Rehabilitation Act of 1973.
- Fair Housing Act as amended.
- Americans with Disabilities Act (with respect to marketing-office and common areas).
- Wisconsin Open Housing Act.
- Architectural Barriers Act.

- The design principles of any one of the following:
 - "Aging in place".
 - "Universal design".
 - Any other accessible and/or adaptable design criteria recommended by the Housing Trust Fund Advisory Board and approved by the Common Council.
- For new housing units in one- to 3-unit structures, each ground-floor unit shall be constructed to the following "visitability" standards:
 - One zero-step entrance to the dwelling unit that will permit a visitor using a wheelchair to enter the main-level floor of the dwelling unit through a doorway entrance that has a minimum 32" clear passage opening.
 - A usable path of travel throughout the interior main-level floor of the dwelling unit that is no narrower than 36" at any point except for interior doorway openings with a minimum 32" clear passage opening.
 - A powder room (half bath) on the main-level floor that has: 1) a doorway entrance with a minimum 32" clear passage opening; 2) sufficient space to close the entrance door while the room is occupied; 3) a minimum 30" by 48" floor space clearance; 4) reinforced walls for future installation of grab bars to provide access to the toilet if necessary.
- Any of these standards (except standards imposed by federal or state law) may be waived or reduced by the Common Council if project site conditions are unsuitable, but any such waiver does not exempt the project from all other applicable requirements regarding accessibility and visitability.

;and, be it

Further Resolved, That the Common Council's Legislative Reference Bureau and the appropriate City officials are directed to draft legislation necessary for further Common Council action to implement the recommendations endorsed herein, including but not limited to an ordinance establishing a Milwaukee Housing Trust Fund and provisions related to its operation and funding; and, be it

Further Resolved, That the Housing Trust Fund Task Force is dissolved as provided in File Number 060069, adopted May 31, 2006, which provided that the Task Force shall be dissolved upon Common Council final action on Final Number 060071, a resolution relating to the recommendations of the task force for the operation and funding of a housing trust fund.

..Requestor

..Drafter
LRB06229-5
JDO
09/25/2006