



## Affordable Housing Advisory Committee 2022 Incentive Review and Recommendation Report SHIP Affordable Housing Incentive Strategies

Submitted to the Board of Sumter County Commissioners  
on November 22, 2022

Submitted to Florida Housing Finance Corporation  
on November 23, 2022

Prepared by: Denna Lafferty, Housing Coordinator

### I. Background Information:

As a recipient of State Housing Initiatives Partnership (SHIP) funds, Sumter County established an Affordable Housing Advisory Committee (AHAC) on September 11, 2008, as required by the Florida Statutes § 420.9076. The committee reviews and evaluates local plans, policies, procedures, land development regulations, the Comprehensive Plan, and other aspects of Sumter County's activities that affect affordable housing production.

Further, the AHAC is specifically directed to consider and evaluate the implementation of the incentives set out in Florida Statutes § 420.9076 (4) (a)–(k). Based on the evaluation, the AHAC may recommend to the local government to make modifications of, exceptions to, or creation of new plans, policies, procedures, and other governing items, which would encourage the production of affordable housing. Recommendations approved by the Board of Sumter County Commissioners are adopted and outlined in an amended Local Housing Assistance Plan (LHAP) and the local Comprehensive Plan Housing Element.

### II. Committee Composition:

The Board of Sumter County Commissioners appoints and re-appoints members to the AHAC. Florida Statutes § 420.9076 (2) lists the selected categories for committee members. The appointed AHAC members are:

<u>Name</u>	<u>Category Represented</u>	<u>Term Span</u>
Doug Gilpin	Local Government Official	11/2021-11/2022
Liz Roberts	Building Industry	7/12/21–7/12/23
Courtney Gage	Banking Industry	7/12/22–7/12/24
Sandra Woodard	Low Income Advocate	7/12/21–7/12/23
Priscilla Lewis	For-profit Housing Provider	7/12/22–7/12/24
Gene Barton	Non-profit Housing Provider	7/12/21–7/12/23
Danny Smith	Real Estate Professional	7/12/21–7/12/23
Luann Duncan	Sumter County Resident	7/12/22–7/12/24

Matthew Yoder	Employee Representative	7/12/21–7/12/23
Robert Hanson	Essential Services Personnel	7/12/22–7/12/24
Asheley Raybon	Alternate	7/12/22–7/12/24
Amber Tucker	Areas of Labor Activity	7/12/21–7/12/23
Melanie Peavy	Local Planning Agency	7/12/21–7/12/23

**III. Public Hearing:**

The AHAC held a public hearing on November 14, 2022, at 10:00 a.m. in Room 102 of The Villages Sumter County Service Center at 7375 Powell Road, Wildwood, FL 34785. A legal advertisement was published in The Villages Daily Sun newspaper on October 18, 2022, and public notices were posted at the building entrance.

Mr. Smith made a motion to adopt the final Affordable Housing Advisory Committee 2022 Incentive Review and Recommendation Report, and Mrs. Gage seconded the motion. The motion carried unanimously.

**IV. Affordable Housing Incentives Recommendations:**

The AHAC, from its review, consideration, evaluation, and recommendations, drafts and submits this report to the Board of Sumter County Commissioners and to Florida Housing Finance Corporation, which details its work and any resulting recommendations. The committee discussed the Affordable Housing Incentives at the following quarterly meetings: April 13, 2022, July 13, 2022, and October 12, 2022. Denna Lafferty, Housing Coordinator, provided support to the committee during the review of the required incentives.

Staff and the AHAC committee used Florida Housing Coalition’s guidebook on the Affordable Housing Incentive Strategies as a reference for the evaluation and review. The guidebook can be found at <https://www.flhousing.org/wp-content/uploads/2019/03/AHAC-Guidebook-2017.pdf>

**Incentive A:**

The processing of approvals of development orders or permits, as defined in Section 163.3164 (7) and (8), Florida Statutes, for affordable housing projects, is expedited to a greater degree than other projects.

The AHAC members were emailed the agenda link on March 17, 2022, which included the Incentive A-D review document. The review document did not contain any new information from the 2021 review.

**Meeting Synopsis on April 13, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** All affordable housing projects in which the County is the lead entity in the process receive expedited permitting. The County will expedite review for affordable housing development. The County currently has an efficient and rapid permitting and review process. Before filing any development order or permit,

the applicant may consult with county staff. This pre-application meeting discusses the schedule and requirements related to the proposed development. The code states Development Services and all authorities shall make every reasonable effort to process all applications as expeditiously as possible, consistent with any public notice requirements and schedule of public hearings established by the commission, and with the need to ensure that all approvals conform to the comprehensive plan and are in the best interests of the citizens of Sumter County.

The Sub-Agreement within the Inter-Local Service Boundary Agreement for each municipality states the county or city will not unreasonably withhold development approval based on the provision or mitigation of Affordable Housing by a developer. Based on staff's assessment, the county complies with Florida Statutes § 163.3164 (7) & (8).

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive A, and Mrs. Lewis seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive B:**

All allowable fee waivers provided for the development or construction of Affordable Housing.

**Meeting Synopsis on April 13, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** All affordable housing projects in which the County is the lead entity in the process receive waived building permit fees, site plan review, variance or special exception, and re-zoning fees.

Local Government Contribution to support a developer applying to Florida Housing Finance Corporation (FHFC) for State Apartment Incentive Loan (SAIL) funding to construct affordable housing developments within Sumter County: On January 28, 2020, the Board of Sumter County Commissioners approved application criteria for the local government's qualifications to support a developer applying to Florida Housing Finance Corporation (FHFC) for State Apartment Incentive Loan (SAIL) funding. Sumter County will provide a local government verification of contribution fee waiver letter to approved applicants for submittal to FHFC; however, the County will only provide one local government contribution award of \$10,000 (via a waiver of road impact fees) per calendar year.

All allowable fee waivers provided for the development or construction of affordable housing: On December 14, 2021, the Board of Sumter County Commissioners approved to provide an impact fee waiver to non-profit housing providers and affordable housing specially designated for households whose income is at or below 120% of the area median income guidelines used for the SHIP program when the cities concurrently waive their impact, capacity, and connection fees for the project.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive B, and Mrs. Lewis seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive C:**  
The allowance of flexibility in densities for affordable housing.

**Meeting Synopsis on April 13, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** The Board of Sumter County Commissioners adopted Ordinance 2018-20 on July 10, 2018. The Ordinance created two high-density residential zoning districts, HDR-12 and HDR-24. The HDR-12 designation allows for twelve (12) units per acre, and the HDR-24 designation allows for twenty-four (24) units per acre. The new high-density residential standards are an effective change to encourage affordable housing. The City of Wildwood adopted the same density standards as the County.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive C, and Mrs. Lewis seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive D:**  
The reservation of infrastructure capacity for housing for very-low-income persons, low-income persons, and moderate-income persons.

**Meeting Synopsis on April 13, 2022:** Mrs. Lafferty described the Incentive.

Sumter County is not an infrastructure provider; therefore, it cannot offer an incentive to reserve infrastructure capacity for low-income persons. A development-requiring infrastructure must obtain those services from the municipalities within the County. The cities would be the lead entity to provide this type of incentive.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive D, and Mrs. Lewis seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive E:**

The allowance of affordable accessory residential units in residential zoning districts.

**Meeting Synopsis on April 13, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** Sumter County's land development code allows accessory family cottages for any residential lot at least half an acre in size. The cottages may be attached to the principal structure or freestanding and are limited in size. An accessory cottage use is restricted to members of the family living in the principal structure. The structure shall not be sold, transferred, or conveyed separately or apart from the principal dwelling unit. The housing element of the Unified Comprehensive Plan states the county shall continue to provide the opportunity for family accessory cottages and lineal transfer provision within its land development regulations for the allowance for affordable accessory residential units.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive E, and Mrs. Lewis seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive F:**

The reduction of parking and setback requirements for affordable housing.

The AHAC members were emailed the agenda link on June 16, 2022, which included the Incentive F-H review document. The review document did not contain any new information from the 2021 review.

**Meeting Synopsis on July 13, 2022:** Mrs. Lafferty described the Incentive.

A property owner or developer can submit an application requesting to reduce setback or standard design requirements through an established policy, which already exists under Sumter County Development Services. Setback reductions are processed as a variance, and design standards are processed under a development review for the subdivision or multifamily housing development.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive F, and Mrs. Gage seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive G:**

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

**Meeting Synopsis on July 13, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** The County has several Planned Unit Development (PUD) classifications. A PUD allows a developer to submit an application that fits within certain guidelines, which can provide for special design and lot configurations. A developer can apply for a zoning district that will allow building a zero-lot-line configuration.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive G, and Mrs. Gage seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive H:**

The modification of street requirements for affordable housing.

**Meeting Synopsis on July 13, 2022:** Mrs. Lafferty described the Incentive.

There are set standards in place for street requirements to ensure functionality. A developer may submit a request for a deviation from the standard requirements in the development review application.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive H, and Mrs. Gage seconded the motion. The motion carried unanimously.

**BOCC Action: None**

**Implementation Date: N/A**

**Incentive 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.

The AHAC members were emailed the agenda link on September 20, 2022, which included the Incentive I-K review document. The review document did not contain any new information from the 2021 review.

**Meeting Synopsis on October 12, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** Housing staff actively reviews policies, procedures, BOCC & Planning and Zoning Special Master meeting agendas, amendments regarding affordable housing, and residential housing developments. If there is an item, which may affect affordable housing, it is brought to the attention of the Division Director. Staff give any recommendations to the Division Director for the County Administrator and BOCC consideration and review. The potential to increase the cost of housing shall not in itself be sufficient to recommend the denial of any proposed changes to existing policies, procedures, ordinances, regulations, or plan provisions. Housing staff tracks any potential effects for the submission of the SHIP annual report. The BOCC Chairman is required to execute a certification confirming that there is an ongoing process for a review of local policies, regulations, and plan provisions that increase the cost of housing before their adoption. The process, which was established in 2007, is an ongoing task of housing staff.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive I, and Mr. Smith seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive J:**

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

**Meeting Synopsis on October 12, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** The Office of Management and Budget (OMB) maintains a list of surplus county-owned properties that may be suitable for affordable housing or for sale. Sumter County adopted the first list on October 9, 2007, and continues to maintain the list of surplus properties within OMB. OMB performs a reconciliation of county expenditures and proceeds following the closing of each sale of surplus property in the event any positive balance for all properties within the fiscal year can support additional funding for affordable housing. The transfer of funds to the Affordable Housing account is the total net profit from sales of these properties, if any. The funding, when available, will assist with various housing projects consistent with the Affordable Housing Plan.

The BOCC approved a new policy for the donation of county-owned property for affordable housing purposes on September 26, 2017. The policy outlines how the BOCC will offer eligible properties for affordable housing opportunities to community housing partners to meet the objective of Florida Statutes § 125.379. When the BOCC gains property through an escheatment tax deed, code enforcement foreclosure, or tax deed sale when associated with a code enforcement case, these properties may not be marketable due to title defects or because they have not sold after a year of being on the market with the BOCC's contracted broker. When any of the conditions above render the property not marketable, then the BOCC may offer the property to a community-housing partner with conditions for sole use in providing a new single-family site-built home or renovation of the existing site-built home on the transferred property. Concurrent to the BOCC proposed action to request transferring property to a community-housing partner, a notice on the BOCC's website will be posted on that intention.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.



**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive J, and Mr. Smith seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

**Incentive K:**

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

**Meeting Synopsis on October 12, 2022:** Mrs. Lafferty described the Incentive.

**Current Policy:** Sumter County has Joint Planning Agreements with all the municipalities within its boundary. The county and cities promote compact growth with a variety of land use within the Municipal Overlay Areas and Joint Planning Areas around each city as a means to promote walkable communities and support downtown corridors. Sumter County uses the Joint Planning Areas to encourage development within areas that have municipal services. Economic development is encouraged, and a mixture of future land use districts are identified to promote high-value growth consistent with the community.

There are several walkable communities within Sumter County, such as The Villages Community District, the City of Bushnell, and the City of Wildwood. These communities consist of mixed-use development and offer a wide variety of different employment opportunities. Sumter County Transit provides public transportation for the citizens of the county.

**Committee Discussion:** The committee had no questions, comments, discussions, or recommendations.

**AHAC Recommendation:** Mr. Hanson made a motion not to make any recommendations regarding Incentive K, and Mr. Smith seconded the motion. The motion carried unanimously.

**BOCC Action: None**  
**Implementation Date: N/A**

- V. **Other Incentive Recommendations from the AHAC:** The committee did not have any additional recommendations for the Board of Sumter County Commissioners.
- VI. **Review Conclusion:** The AHAC did not have recommendations for any of the Affordable Housing Incentive Strategies.

**VII. Additional Information:** All incentives or policies related to incentives are outlined in Sumter County's 2022-2025 Local Housing Assistance Plan.

*References used by support staff for incentive review:*

*Direct Quotations used from Affordable Housing Incentive Strategies "A Guide Book for Affordable Housing Advisory Committee Members and Local Government Staff" Prepared by Florida Housing Coalition, Inc*  
<https://www.flhousing.org/wp-content/uploads/2019/03/AHAC-Guidebook-2017.pdf>

*Sumter County Land Development Code:*  
[https://library.municode.com/FL/sumter\\_county/codes/code\\_of\\_ordinances](https://library.municode.com/FL/sumter_county/codes/code_of_ordinances)

*Sumter County's Comprehensive Plan:* <https://sumtercountyfl.gov/DocumentCenter/Home/Index/612>