



Developing a Housing Strategy and Action Plan: A Case Study

Approaches Used in
Montgomery County, MD

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A Housing Strategy: Where to Begin

- Look at your current organization
- Evaluate your current programs
- Get feedback from your customers and partners
- Evaluate the potential resources available:
 - Financial resources
 - Partners, such as non profits
 - Political support
 - Staffing within the organization



Figure out What You are Trying to Achieve

- If you don't know where you are going, any road will take you there
- Solve the problems in facing your community not the problems you read about in journals



Traps to Avoid

- ❑ Data collection: avoid endless data collection, some of it is very difficult to obtain
- ❑ Do not adopt a policy from another jurisdiction just because it looks good or won an award
- ❑ Do not prepare a policy in isolation: get input from other groups.
- ❑ Secretly developed policies do not get implemented



Look at your Current Organization

- What is the internal climate of your organization?
- Is there a customer focus and feedback mechanism?
- Is the organization well managed?
- Is there a spirit of collaboration and teamwork?



What to look for In Your Programs

- ❑ Who is the program serving?
- ❑ Are the resources appropriate to the task?
- ❑ How are you measuring the effectiveness of the program?
- ❑ How does this program relate to other programs?
- ❑ Who are your team members or interested parties?



Get Feedback from Interested Parties

- Initiate customer feedback system
- Meet with organizations that are interested in affordable housing or housing programs:
 - the apartment owners organization,
 - tenants rights groups,
 - neighborhood organizations,
 - non profit partners, etc
- Meet with elected officials or other departments to determine areas of mutual interest



Overview of Montgomery County

- ❑ Major urban county outside Washington DC
- ❑ Population nearing 1 million
- ❑ Major bio technology and Federal Government research center
- ❑ Known for progressive Housing and Planning programs
- ❑ High housing costs remain, after some minor reductions



Case Study: Montgomery County MD

- Approach to the Policy Document
 - Program evaluation
 - Data collection
 - Input from stakeholders
- Policies and Programs
 - Code Enforcement
 - Housing Trust Fund
 - Neighborhoods Alive!



Montgomery County in 1995

- Little focus on the customer
- Poor morale
- Out dated policy
- Poorly managed sections
- Rivalry between senior staff



Warning Signs

- ❑ “Housing Policy for the Eighties” still in place in 1995
- ❑ Physical separation of staff by section
- ❑ Roof collapse in old building
- ❑ Hours of operation for the public very limited
- ❑ No strategic plan



Code Enforcement

□ Previous Situation

- **No technology**
- **Only 10% inspection**
- **County attorney not interested in cases**
- **No landlord training**
- **No tenant information**
- **All buildings treated the same**

□ New Approach

- **Each inspector has hand held device**
- **100% inspection of at risk buildings**
- **Landlord training sessions**
- **Tenant selection software**
- **Landlord /tenant handbook**
- **Work closely with**



Housing Trust Fund

□ Previous Approach

- No annual funding
- Limited information on fund available
- No outreach to non profits
- No strategy for projects to fund
- Decisions by division chief

□ New Approach

- Annual funding up to \$16 million and up
- Loan committee
- Target funds to preservation and rehabilitation
- Outreach to non profits
- Work closely with human services



Housing Trust Fund

- ❑ Established in 1989
- ❑ Now dedicated 2.5% of property taxes minimum
- ❑ This year \$30 million
- ❑ Soft second loans to nonprofit and for profit developers
- ❑ Layered with many programs
- ❑ Has produced over 8,000 units
- ❑ Leveraged \$6 to every county dollar



Neighborhoods Alive!

□ Previous policy

- Scattered used of rehabilitation
- No communication between sections
- Limited hours for tenant complaints

□ New policy

- Identify at risk neighborhoods
- Send teams from all sections
- Priority funding with CDBG and trust fund
- Work with public works and other departments



Implementation Plan

- ❑ Specific Goals
- ❑ Objectives
- ❑ Price Tag
- ❑ Measuring outcomes



Adoption of Policy

- Role of Advocates
- Role of Chief Elected Official
- Role of County Council



STRONG ADVOCATES

- Advocates included Action In Montgomery (AIM)
 - Organized through religious organizations
 - Chose housing as critical issues
 - Lobbied elected officials
 - Active in public proceedings
- Traditional non profit housing providers
 - Brought out many organizations



County Executive Strong Leader

- Support for Affordable Housing
- Litmus test for supporting candidates for council during election
- Wrote executive order funding housing trust fund at \$16 m per year



County Council's Role

- ❑ Initially voted down housing funding 8-1
- ❑ After election with new members supported by Executive, funded housing trust 9-0
- ❑ Ongoing role in goals for spending the trust fund



Outcomes

- ❑ Several neighborhoods turned around
- ❑ Renovation and preservation of 8,000 affordable and moderate priced units over 10 years
- ❑ Many non profit partners
- ❑ Staff morale and productivity increased
- ❑ Policy and strategy clearly understood



For More Information

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