

**ANNUAL REPORT**  
**of the**  
**SHIMBERG CENTER FOR AFFORDABLE HOUSING**



M.E. Rinker, Sr. School of Building Construction  
College of Design, Construction, and Planning  
University of Florida  
P. O. Box 115703  
Gainesville, Florida 32611-5703

**December 2003**

## Cover Story

The Shimberg Center for Affordable Housing is administratively attached to the M. E. Rinker, Sr. School of Building Construction in the College of Design, Construction and Planning at the University of Florida. On October 14<sup>th</sup> the School of Building Construction held a dedication ceremony for the newly constructed M. E. Rinker, Sr. Hall. The new Rinker Hall also serves as the new home of the Shimberg Center.

The \$10 million, 47,270-square-foot building is special in its own right. It is one of about 600 buildings built nationwide that are certified under a national standard known as Leadership in Energy and Environmental Design (LEED). Rinker Hall is designed to use half the energy of other buildings its size and just a fraction of the water. Most of the building's components were recycled, came from responsibly managed forests, or can someday be reused in another building. The classrooms, labs, and offices were built with materials selected because they don't emit chemicals tied to so-called sick building syndrome. Other steps ensure against mold or other biological pathogens. Abundant windows, airy classrooms, and a sky-lit atrium make the building more pleasant than futuristic.

The Shimberg Center's main office is located in Rinker Hall, room 203. Three of the Center's faculty members are located in individual offices on the third floor and four graduate students are located in room 320.

Correspondence sent to the Center should employ the following address:

<Recipient's name>  
Shimberg Center for Affordable Housing  
P. O. Box 115703  
Gainesville, FL 32611-5703

The shipping address for the Center is:

<Recipient's name>  
University of Florida Campus  
Shimberg Center for Affordable Housing  
Rinker Hall, Room 203  
Gainesville, FL 32611

## AUTHORIZATION

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

*The Board of Regents shall establish the Multidisciplinary Center for Affordable Housing within the School of Building Construction of the College of Architecture of the University of Florida with the collaboration of other related disciplines such as agriculture, business administration, engineering, law, and medicine. The center shall work in conjunction with other colleges in the State University System. The Multidisciplinary Center for Affordable Housing shall:*

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

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

## CONTENTS

<u>Section</u>	<u>Page</u>
Cover Page.....	i
Cover Story.....	ii
AUTHORIZATION.....	iii
CONTENTS .....	iv
EXECUTIVE SUMMARY .....	v
INTRODUCTION.....	1
TEACHING.....	2
Undergraduate Courses.....	2
Graduate Courses.....	3
Graduate Students.....	3
RESEARCH.....	4
Tampa Community Outreach Office.....	4
Special Needs Housing Research.....	5
Public Housing Authorities Research.....	5
Housing Summit.....	5
DCA Impact Fee Proportionality Project.....	6
Workforce Housing in Islamorada.....	6
Florida Housing Data Clearinghouse.....	6
State of Florida’s Housing .....	7
Privatization of Plan Reviews & Inspections.....	8
Windstorm Damage Mitigation Training & Demonstration Centers.....	8
Energy Characteristics of New Homes in Florida.....	8
Various Projects.....	8
SERVICE.....	9
Community Statistical Systems.....	9
Dissemination.....	10
ADMINISTRATION.....	11
Financial.....	11
Personnel.....	12
APPENDIX A.....	13
<i>Affordable Housing ISSUES</i> Newsletter.....	13
Technical Note Series.....	14
Research Reports.....	15

## **EXECUTIVE SUMMARY**

The Shimberg Center completed establishment of a graduate level certificate program in affordable housing that will be available to students from across the university. The Center continues to work on a masters degree program in housing and community development that will be a distance-learning program, delivered over the Internet, to professionals whose work is related to housing. Opportunities to work with several partners are being explored and a draft curriculum plan has been developed.

During 2003 the Shimberg Center established a Community Outreach Office in Tampa. The Outreach Office is located in a facility owned by the Tampa Housing Authority and represents a collaborative effort of the Institute of Urban Policy and Commerce, Florida A&M University; Shimberg Center for Affordable Housing, University of Florida; and the School of Social Work, University of South Florida. The goal of the Outreach Office is to house community development efforts of the three universities in a single location in order to provide a coordinated outreach function building on the strengths of each university. The Center also began collection of information about housing opportunities for persons with disabilities with an initial concentration of the role of public housing authorities. A housing summit is planned for early 2004 to bring together professionals who serve persons with disabilities and executive directors of Florida's public housing authorities. Other studies examined implementation of the privatization of plans review and construction inspection that is described in s. 553.791, Florida Statutes, and assessment of the impact of Florida requiring a proportional, rather the flat rate, impact fee as a means of stimulating affordable housing production.

In 2003, the Shimberg Center for Affordable Housing worked with the support of The Ford Foundation to coordinate the establishment of a national CSS Network and knowledge clearinghouse. The mission of the CSS Network will be to promote the development, adoption, and effective use of community statistical systems within the United States. This effort will continue through 2004. Included in the Center's service activities was the production of six more newsletters and seven technical reports. All material continues to be available through the Internet at [www.shimberg.ufl.edu](http://www.shimberg.ufl.edu).

Staffing stands at ten professionals plus four graduate research assistants and one doctoral student. Support for the staff came from the University (\$260,044) plus a combination from foundations, the Center's endowments, and contracted research totaling \$310,880. It is interesting to note that the backlog of contract research as of December in FY2004 stood at over \$537,700.

## INTRODUCTION

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

**Housing Technology** - Since its establishment, the Center has examined housing affordability, housing condition, inclusionary housing, impact fees, land development and land development regulations, manufactured housing, and community development corporations. It has worked with the Florida Building Code Commission and other organizations impacted by the establishment of the Florida Building Code as well as the Existing-Building Code.

**Florida Housing Data Clearinghouse** - The Florida comprehensive planning process requires jurisdictions to evaluate progress and update their comprehensive plans periodically. Working in cooperation with the Florida Department of Community Affairs and the Florida Housing Finance Corporation, the Shimberg Center developed and implemented the Affordable Housing Needs Assessment model. Exercise of the model and production of the resulting reports about affordable housing supply and demand offers local jurisdictions an accepted means of evaluating their progress toward the housing goals described in the Housing Element of their Comprehensive Plans. The Clearinghouse maintains a database of statewide housing supply and demand data. The database represents a combination of Census data, Florida property appraiser data, data from Florida's affordable housing needs assessment, and local program data. All reports that are produced and the data contained in the Florida Housing Data Clearinghouse database are publicly available on the Internet at [www.shimberg.ufl.edu](http://www.shimberg.ufl.edu) and by selecting "Fla. Housing Data" link.

**Other Research Projects** - The Clearinghouse has developed an inventory of assisted housing in Florida. State and local officials, nonprofit housing agencies, and the private market use these data for program planning and program evaluation. Special data subsets address the housing needs of special population groups like the elderly, farm workers, and persons with disabilities. Other applications of these data

include disaster evacuation planning and predicting potential property losses under different manmade or natural disaster scenarios.

**Teaching** - Although the Center has taught housing-related courses for several years, a formal “residential track” within the construction management curriculum of the M. E. Rinker, Sr. School of Building Construction was approved in 1998 and implemented in 1999. This addition to the curriculum was the result of requests from the home building industry. Recognizing a need to expand training opportunities in non-profit management for those working in community development, the Shimberg Center is also leading an effort to establish a campus-wide undergraduate minor in non-profit management. This effort is being carried out in association with American Humanics, a national organization of universities providing educational opportunities for students pursuing careers in the non-profit sector.

The purpose of this Annual Report is to describe the highlights of the teaching, research, and service activities of the Shimberg Center for Affordable Housing during the past year. A separate section is presented that describes the staff members of the Center and the funding for the Center.

## TEACHING

### Undergraduate Courses

The residential track offered within the Rinker School of Building Construction comprises three required courses:

- **Project Planning and Feasibility** exposes the student to the process of producing a proposal for development of a residential project on a specific site. The proposal includes sections on market analysis, site analysis, project programming, schematic design, project cost estimate, and financial feasibility. The final product of this project is a design-build proposal that effectively communicates project viability in a professional manner.
- **Creating Affordable Housing** introduces the student to the key factors that have produced changes in US cities that, in turn, have contributed to the current housing situation. The student gains an appreciation for ways to reduce the cost of housing delivery, factors in the delivery process (including regulations, finance, building materials, construction methods) that contribute to affordability problems, and potential methods to facilitate the delivery of housing that is affordable to the buyer.

Upon completion of the course the student will be able to identify potential markets and alternative financing vehicles for affordable housing. They will be prepared to intervene effectively in discussions regarding local land use and building regulations.

- **Housing Transactions for Homebuilders** is modeled on the real estate licensing course and provides an introduction to ownership rights in real property and limitations on those rights, the transfer of rights, the process of selling a property including contracts and closing, mortgages, markets, and valuation of property. The emphasis is on providing the homebuilder with a working knowledge of the sale and leasing of property. Upon completing the course the students will have an understanding of mortgage types, market opportunities, and the valuation process. They will also be able to complete the process of selling property including the documents involved.

### **Graduate Courses**

The Shimberg Center offers a graduate-level course titled **Housing Economics and Policy** that familiarizes students with basic theories, concepts, terminology, and issues in housing as well as examining the factors contributing to housing problems and evaluating housing policies. Upon completion of the course the student is able to estimate the demand for housing, examine the feasibility of a housing project, and understand the role of government, lenders, and other institutions in the housing market.

### **Graduate Students**

The Shimberg Center's faculty either chair or serve on committees supervising students conducting research and developing dissertations, theses, and terminal projects that are required in partial fulfillment of the requirements of graduate degrees. In 2002-2003 the Center faculty served on doctoral committees in Sociology, Building Construction, Civil Engineering, and Food and Resource Economics.

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

At the graduate level, a certificate program in affordable housing has been approved which is available to students from such disciplines as real estate, public administration, planning, and law. The center continues to work on a masters degree program in housing and community development. This degree

program will be a distance-learning program, delivered over the Internet, to professionals whose work is related to housing. Opportunities to work with several partners are being explored and a draft curriculum plan has been developed.

The Shimberg Center is also working on a memorandum of understanding (MOU) with the Neighborhood Reinvestment Corporation to jointly develop a degree program in housing and community building. The MOU forms the basis for a relationship between the Neighborhood Reinvestment Corporation's training institutes and the university's program.

## **RESEARCH**

Since the passage of the William E. Sadowski Affordable Housing Act of 1992, the research activities of the Shimberg Center have been coordinated with the activities of the Florida Department of Community Affairs. Presented below are summaries of new and continuing research projects that were active during 2002-2003 at the Shimberg Center for Affordable Housing.

### **Tampa Community Outreach Office**

The Tampa Community Outreach Office, located in West Tampa in a facility owned by the Tampa Housing Authority, is a collaborative effort of the Institute of Urban Policy and Commerce, Florida A&M University; Shimberg Center for Affordable Housing, University of Florida; and the School of Social Work, University of South Florida. The goal of the Outreach Office is to house community development efforts of the three universities in a single location to provide a coordinated outreach function building on the strengths of each university. Specifically, the center would provide:

- Technical assistance to local governments and nonprofit organizations
- Applied research, including community data base development and GIS mapping
- Project displays and resources
- Broaden the resource base on community development initiatives
- Provide a forum for training and a data base for regional partners
- Internship placements for students
- Workshops and symposia
- Support to the Tampa Housing Authority and the Homeownership Center
- Support city and county government housing and community development strategies
- Compilation of best practices models

- Provide space for other partners and funders

The benefits of cooperative work across the universities have become apparent through past collaborative efforts, and the goal of this agreement is to formalize the cooperation between the university centers. Through this cooperative arrangement, the resources of the three universities will be brought to community development issues in the Tampa Bay region and the uniqueness of the partnership will create opportunities for increased foundation and federal funding and support.

### **Special-Needs Housing Research**

The Shimberg Center for Affordable Housing began implementation of a special-needs housing research agenda in 2003. This agenda was developed in collaboration with supportive housing experts and service providers. Research thus far has focused on how public housing authorities use their resources to serve persons with disabilities, as well as on specialized demographics related to persons with disabilities and elderly citizens that will be made available on the Florida Housing Data Clearinghouse in the coming months. Ongoing research efforts include participation in a statewide initiative that will create a web-based inventory of currently available rental housing accessible to person with disabilities.

### **Public Housing Authorities Research**

The Shimberg Center for Affordable Housing is currently under contract with the Florida Association of Housing and Redevelopment Officials (FAHRO) to study a number of issues related to the implementation of federal housing policy and programs at the local level. These issues include an analysis of public housing authority performance in the administration of both public housing units and housing choice (Section 8) vouchers. Other issues included in the research focus include an analysis of selected financial issues and overcoming barriers to effective management.

In addition, the Shimberg Center is working in partnership with Florida A&M University and the University of South Florida under contract with the Tampa Housing Authority for the evaluation of its HOPE VI development, Belmont Heights. The partnership will continue its efforts to perform this type of community outreach and research in the coming months.

### **Housing Summit**

Plans are underway at the Shimberg Center for a February 2004 housing summit that is intended to open a dialogue between professionals who serve persons with disabilities and executive directors of Florida's public housing authorities. This meeting is Florida's first effort to bring together statewide leadership from both groups for facilitated discussion of key issues regarding how persons with disabilities are served with federal programs administered through local public housing authorities.

### **DCA Impact Fee Proportionality Project**

The Shimberg Center has been funded by the Department of Community Affairs to develop and provide demographic information for local governments that will enhance their ability to respond to recommendations contained in the Governor's Affordable Housing Study Commission's 2002 Report. This report included recommendations that local governments use proportional impact fees based on a number of factors, including dwelling size. Following these recommendations may facilitate production of housing products affordable to more of Florida's citizens.

### **Workforce Housing in Islamorada**

Working as a subcontractor on a study of workforce housing issues in Islamorada, FL, the Shimberg Center is using its data set for the community, supplemented by labor force, employment, and other data, to examine housing needs and jobs/housing issues. Islamorada presents unique issues due to the construction limitations and housing costs in the Keys.

### **The Florida Housing Data Clearinghouse**

The origin of the Clearinghouse was with the Governor's Affordable Housing Study Commission. At the Commission's urging a working group of stakeholders that included representatives from local governments, regional entities, housing advocates, groups such as the Florida Home Builders Association and the Florida Association of Realtors, and state agencies was organized in 2000. The Housing Data Clearinghouse was created to provide public access to data on housing need and supply from a variety of sources. These data sources include the U.S. Census and other population and housing surveys carried out by the federal government; the Affordable Housing Needs Assessment; and federal, state, and local program data.

In addition to providing housing data, the Clearinghouse is building the capacity, or infrastructure, to collect, produce, and store this information for easy public access. Over time anyone will be able to obtain data, run reports, and perform data analysis by going to the Clearinghouse website. Indeed, the Affordable Housing Needs Assessment, which is the data and analysis package prepared for each local government to aid them with their comprehensive planning responsibilities, will be accessed by all on this website.

The Clearinghouse will take about five years to get fully operational, and the Shimberg Center at the University of Florida is the lead organization in its development. To ensure that the Clearinghouse provides access to the most needed data products and services, the Shimberg Center regularly confers

with an advisory committee made up of end users. The FY2003-2004 state contract is \$252,900, using monies from the State and the Local Housing Trust Fund plus another \$150,000 contributed as by the Shimberg Center from its own resources.

The responsibilities of the Florida Housing Data Clearinghouse include:

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

### **State of Florida’s Housing**

The Shimberg Center produced the fourth annual report titled *The State of Florida’s Housing, 2003*. The report is a compendium of facts on Florida’s housing. Faculty from Florida Atlantic University and Florida State University made major contributions to the production of the report. The data highlight the tremendous diversity in housing characteristics across the state, particularly between the 35 urban counties and the 32 rural counties, as well as between coastal and non-coastal counties. The characteristics of Florida’s housing reflect the characteristics of the state’s population. The population of the state is growing, creating a demand for additional housing, yet that growth is not distributed uniformly across the state. Growth is most often a coastal phenomenon. Further, the nature of the growth differs across the state as characterized by age, income, race, ethnicity, and county of origin. In addition to a wealth of information on the characteristics of Florida’s housing stock by county, the report also includes a chapter on Florida’s dynamic population and household changes in the decade between the 1990 and 2000 Census and the effect of those changes on housing as well as chapters on housing prices and affordability and house price trends.

### **Privatization of Plan Reviews & Inspections**

The Florida Building Code Commission issued a contract to the Shimberg Center to evaluate the implementation of the provisions of s.553.791, Florida Statutes, which was implemented in October 2002. This statute allowed building owners to hire their own plan reviewers and building construction

inspectors rather than rely upon the reviewers and inspectors of the local jurisdiction. A telephone survey of building officials found thirteen jurisdictions that had experienced the exercise of this provision. Interviews with the thirteen local jurisdictions plus with commercial and residential builder associations, the building official association, and with engineering firms offering the plan review and inspection services found no consensus about the benefits of 553.791. Some jurisdictions indicated that privatizing the review and inspection tasks were working quite well while others regarded it as a disaster. The lack of experience with the privatization process and the quick-turnaround nature of the evaluation study led to the recommendation that the Commission initiate a project to develop consensus recommendations for revisions and enhancements that will improve the effectiveness of this code support system.

### **Windstorm Damage Mitigation Training & Demonstration Centers**

During 2003 negotiations took place with Broward County for the fourth Windstorm Damage Mitigation Training & Demonstration Center. The primary purpose of these centers is to create a statewide network of training and demonstration sites for improving the wind resistance of existing and newly constructed homes. The Shimberg Center serves as the administrator of the program working with an architect, civil engineering firm, and construction manager. All land development and construction tasks are performed by local contractors selected from the regions in which the facilities are built. Once completed, the Department of Financial Services turns the building over to the county. Once operational, the county must agree to operate and maintain the building. The only stipulation is that the county utilize the facility primarily for activities that will improve the wind resistance of both existing and newly constructed homes.

### **Energy Characteristics of New Homes in Florida**

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

### **Various Projects**

The Shimberg Center is a participant on a multi-disciplinary, multi-year research study of the impact of Florida's growth management legislation on rural areas in the state. The study is examining the use,

property value, and financial implications of growth management. It is funded by the U.S. Department of Agriculture.

The Sarasota Office of Housing & Community development commissioned the Center to study issues affecting mortgage defaults among low-income households receiving down payment assistance through both the SHIP and HOME programs.

Non-funded research includes studies of the implications of concurrency for housing in the state, the sustainability of low-income household homeownership, cost savings resulting from energy efficiency in homeownership, the Low-Income Housing Tax Credit, and measuring housing need, estimating housing rehabilitation needs, and implications of the Save Our Homes amendment.

## **SERVICE**

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

### **Community Statistical Systems**

In 2002 the Ford Foundation and the Fannie Mae Foundation provided funding for the Shimberg Center to organize and conduct a national conference titled “Next Generation of Community Statistical Systems.” In this context community statistical systems (CSS) are multi-topic, multi-source, publicly available databases that enable community residents and local decision-makers to be better informed about current and historical neighborhood and local conditions.

In 2004, the Shimberg Center for Affordable Housing worked with the support of The Ford Foundation to coordinate the establishment of a national CSS Network and knowledge clearinghouse. The mission of the CSS Network will be to promote the development, adoption, and effective use of community statistical systems within the United States. The short-term goals of this effort are:

- **Facilitating relationships**—The CSS Network will encourage relationship building between and among researchers, advocates, and data providers as well as between and among government agencies, nonprofits, and for-profits. It will do so through a variety of interactive mechanisms, including a major conference in 2003 and smaller workshops on specific topics through the year. Establishing a listserv will provide an electronic forum for information exchange.
- **Providing technical information**—The CSS Network will gather, organize, and disseminate technical information of value to practitioners, advocates, and researchers including professional standards and practices, information on activities in the field, and updates regarding various data sources. Dissemination will take advantage of existing journals and electronic web sites.
- **Promoting CSS as a valuable tool**—The Network will have a marketing function, seeking to convince leading national opinion leaders and resource providers regarding the value and legitimacy of community statistical systems and encouraging local nonprofits and governments to establish such systems.
- **Facilitating access to funding**—The CSS Network will aid researchers and local developers of community statistical systems in identifying potential sources of funding support by assembling a compendium of foundations and other organizations that have a history of providing such support.

### **Dissemination**

Volume XIII of the Center's bi-monthly newsletter titled, *Affordable Housing ISSUES*, included the following topics:

- December 2002 - *Measuring Sprawl & Its Impact*
- February 2003 – *Top Ten State & Local Strategies to Increase Affordable Housing Supply*
- April 2003 – *Predatory Lending*
- June 2003 – *Impact of Construction & Real Estate on Florida's Economy*
- August 2003 – *Florida's Single-family Housing Supply*
- October 2003 – *New Office Location*

In addition, the following reports were produced by the Center:

*Energy Related Characteristics of New Home Construction in Florida (Revised)*  
*Impact of Real Estate on the Florida Economy – Update for 2002*  
*Impact of Real Estate on the Florida Economy – Update for 2003*  
*Public Housing Authorities: An Analysis of Practices and Resources for Serving Disabled Persons*  
*Energy Related Characteristics of New Home Construction in Florida – 2003*  
*The Impact of Real Estate on the Alachua County Economy*  
*Energy Related Characteristics of Multi-family Housing Construction in Florida - 2003*

All newsletters and reports are available publicly on the Internet at the Center's web site at [www.shimberg.ufl.edu](http://www.shimberg.ufl.edu) by clicking on either "Fla Housing Data" or "Publications" on the home page.

## ADMINISTRATION

### Financial

The funds that support the Shimberg Center's activities come from three sources: 1) state funds, 2) endowment earnings, and 3) contracts and grants. During the fiscal year 30 June 2004, the Shimberg Center for Affordable Housing received \$260,044 for salaries & benefits, for other expenses, and other personnel services funds from the University of Florida. The distribution of these funds by expense category for fiscal 1998 through 2004 is shown below.

Fiscal year →	1998	1999	2000	2001	2002	2003	2004
<b>Total</b>	\$238,146	\$245,007	\$262,020	\$248,715	\$253,175	\$255,684	\$260,044
<b>Expense category</b>							
Salaries & benefits	83%	85%	81%	81%	87%	91%	92%
Other personnel	10%	11%	11%	10%	10%	2%	2%
Other expenses	7%	4%	7%	6%	3%	6%	6%
Operating capital outlay	2%	-	1%	1%	-	-	-
Unexpended	-	-	-	2%	-	-	-

The annual estimated earnings from the endowments that are administered by the University of Florida Foundation for the Shimberg Center provide another \$89,400 for the support of faculty and graduate research assistants plus approximately \$8,000 per year for discretionary uses. The Center's two endowments are:

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

The other source of funding for the Center is contract or grant supported activities. In FY2002-2003 the total contract and grant awards received from federal agencies, from state agencies, and from foundations came to \$310,880. (Note: Although FY 2004 is only half over, the backlog of funded activities has reached \$537,711.) Combining FY 2003 funded research with the FY 2004 University and UF Foundation funding, the Center leverages the state funds by over a 2:1 ration.

## **Personnel**

Dr. Robert C. Stroh, Sr. continues to serve as director of the Center and Dr. Marc T. Smith continues as associate director. Office administration and secretarial support are provided by Ms. Linda Stanley.

Mr. William O'Dell continues as manager of the Florida Housing Data Clearinghouse project and Mr. James Martinez continues as coordinator of computer applications and implementation of Internet access to the Florida Housing Data Clearinghouse. Ms. Diep Nguyen is the principal programmer for Clearinghouse database development. Mr. Jason Boxman is the Center's newest programmer working on computer application development. Mr. Douglas White, economist, is focusing on the development of models that can assess housing condition from existing data, housing database development and other housing research projects, and is the principal author of *The State of Florida's Housing*. Ms. Anne Lockwood Williamson is coordinator of research programs and services and she serves as principal investigator for special-needs housing research and co-principal investigator for a study of impact fee proportionality.

The Shimberg Center also supports one doctoral student—Virginia Batista— as well as three master's degree students—Paul Archacki and Rob Burnett. The third master's degree student, Michael Madariaga, will join the Shimberg Team in January 2004.

## APPENDIX A

### List of Publications

#### *Affordable Housing ISSUES Newsletter*

	<b>2003</b>				<b>1997</b>
Oct	New Office Location		Dec	Local Economic Contribution of Home Building	
Aug	Florida's Single-family Housing Supply		Oct	A Program for Youth at Risk	
Jun	Impact of Construction & Real Estate on Florida's Economy		Aug	Housing Assistance in Florida	
Apr	Predatory Lending		Jun	Affordable Housing Research Needs in Florida	
Feb	Top Ten State & Local Strategies to Increase Affordable Housing Supply		Apr	Fannie Mae Trillion Dollar Commitment	
			Feb	Comprehensive Homeownership Assistance Program	
	<b>2002</b>				<b>1996</b>
Dec	Measuring Sprawl & Its Impact		Dec	Estimating Affordable Housing Need	
Oct	Mold		Oct	Resident Economic Development Initiative	
Aug	The State of Florida's Housing, 2002		Aug	Rural Development Strategic Plan	
Jun	Local Economic Contribution of Home Building		Jun	Shimberg Center Home Page	
Apr	Exemption from Ad Valorem Taxation for Affordable Housing		Apr	1996 Summer Housing Institute	
Feb	Assessing Outcomes		Feb	There Goes the Neighborhood?	
	<b>2001</b>				<b>1995</b>
Dec	Community Land Trust		Dec	Florida Housing Coalition: At Work for Affordable Housing	
	<b>2000</b>		Oct	Affordable Housing Auction	
Oct	13 <sup>th</sup> Annual Statewide Housing Conf.		Aug	Technical Assistance Providers	
Aug	Three HUD Housing Programs		Jun	One-stop Permitting Process	
Jun	The State of Florida's Housing, 2000		Apr	Defensible Space	
Apr	Social Benefit & Cost of Homeownership		Feb	Summer Housing Institute 1995	
Feb	Rehabilitation Subcode				<b>1994</b>
	<b>1999</b>		Dec	A Visit to Age-Sensitive Housing	
Dec	Design Matters in Affordable Housing		Oct	Sustaining Housing Affordability	
Oct	Rental Property Management		Aug	Alternative Residential Building Systems	
Aug	Rental Housing Affordability Gap		Jun	Public/Private Partnership for Affordable Housing	
Jun	HUD Community Builder Program		Apr	Affordability After Occupancy	
Apr	21 <sup>st</sup> Century Housing Symposium		Feb	Housing Trends	
Feb	Regional Training & Demonstration Centers				<b>1993</b>
	<b>1998</b>		Dec	Impact Fee Exemption for Affordable Housing in Florida	
Dec	Affordable Housing Alternatives		Oct	Low- and Moderate Income Lending Experiences	
Oct	Affordable Housing Through Historic Preservation		Aug	Density Bonuses for Affordable Housing in Florida	
Aug	Florida Housing Data Center		Jun	Affordable Housing Advisory Committee	
Jun	The Positive Effect of Homeownership		Apr	Homeownership Training	
Apr	Hidden Cost of Inadequate Housing		Feb	Employer Assisted Housing	
Feb	Community Builders Fellowship				

<b>1992</b>		Jun	The Low Income Housing Tax Credit
Dec	State Housing Initiatives Partnership	Apr	Subsidized Housing Inventory
Oct	Affordable Housing Indexes – An Overview	Feb	Cost Reducing Land Development Guidelines
Aug	Sadowski Affordable Housing Act	<b>1990</b>	
Jun	Inclusionary Affordable Housing	Dec	Mutual Housing Associations
Apr	Jobs/Housing Balance	Oct	Financing Schemes
Feb	Single-Room Occupancy (SRO)	Aug	Technical Resources
<b>1991</b>		Jun	Keys to Success for Community-based Development
Dec	Understanding and Neutralizing NIMBYism	Apr	Affordable Housing Organizations in Florida
Oct	Impact Fees and Affordable Housing	Feb	SUS Housing Related Research
(Spec)	Shimberg Commits \$1 Million to Housing Center	<b>1989</b>	
Aug	Housing Price Impact of Affordable Housing	Dec	Introduction to the Center

### Technical Note Series

- #03-5 Energy Related Characteristics of Multi-family Housing Construction in Florida - 2003
- #03-4 Impact of Real Estate on the Alachua County Economy
- #03-3 Energy Related Characteristics of New Home Construction - 2003
- #03-2 Public Housing Authorities: An Analysis of Practices & Resources for Serving Disabled Persons
- #03-1 Impact of Real Estate on the Florida Economy – Update for 2003
- #02-2 Impact of Real Estate on the Florida Economy – Update for 2002
- #02-1 Energy-Related Characteristics of New Home Construction in Florida (Revised)
- #01-4 County Locations of Frail, Low-income Older Persons in Need of Affordable Assisted Living in Florida
- #01-2 The Low-Income Housing Tax Credit & Multi-family Bond Financing: A Comparison of State-level Allocation Policies
- #01-1 Inclusionary Housing – A Discussion of Policy Issues
- #00-2 Alternative Residential Building Systems – Second Edition
- #00-1 Affordable Housing in Florida, 1999
- #99-1 Migrant Farmworker Housing Needs Assessment Methodology
- #98-1 Affordable Housing in Florida - 1998
- #97-1 Affordable Housing in Florida - 1997
- #95-3 Technical Assistance Resources: Organizations and Publications
- #95-2 A Cost Comparison Study Between Steel and Wood Residential Framing Systems
- #95-1 *Affordable Housing ISSUES: 1989 - 1995*
- #94-4 Bridge Builders: Community Development Intermediary Systems in the United States
- #94-3 Demographics, Technology, and the Future of Housing: Preparing for the 21<sup>st</sup> Century
- #94-2 Manufactured Housing in Florida
- #94-1 Alternative Residential Construction Systems

#93-1 Impact Fee Usage in Florida

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

**Research Reports**

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

#93-2 Growth Management and Housing

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

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