Developing a New Best Practices in Housing Case Study Series

DISCUSSION LEADER

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DISCUSSION SUMMARY

At the Terwilliger Center Roundtable Lunch, the focus of *Table 8: Developing a New Best Practices in Housing Case Study Series* was to gain knowledge and insight on how the Center's new online case studies should be presented. The discussion focused on three key points: (1) what topics should be covered, (2) the format of the online case studies, and (3) suggestions on information that should be included. In regards to topics, the discussion group agreed that affordable housing developments or developments that increase housing affordability should be the focus of the case studies.

The group was pleasantly surprised to learn that the best practices case studies will be made widely available to the public and suggested that we present the case studies as posts on the new ULI website, which has recently moved to a dynamic, content-sharing platform. The group agreed that the post should also include a link to a PDF of the case study, so that the document can be easily downloaded. The post format would also allow readers to comment on case studies to provide feedback on the actual case study or to provide ideas for future topics. Finally, we discussed the type of information critical to the new best practices case study format; there was a general consensus that a pro forma be made available for each development project. However, the group suggested that access to the pro forma be restricted only to ULI members.

The discussion group also suggested that we focus more on financing, including highlighting policies that are driving funding sources. In addition to these key components, the group also discussed a number of other strategies that will help shape these best practices case studies going forward. The next step in this process is to organize the group's suggestions into an implementation plan.

LEARN MORE

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ADDITIONAL RESOURCES

Developing Housing for the Workforce: A Toolkit (2007)
http://uli.bookstore.ipgbook.com/developing-housing-for-the-workforce-products-9780874209297.php?page_id=21

Best Practices: Workforce Housing Development (2009)
http://uli.bookstore.ipgbook.com/best-practices-products-9780874201413.php?page_id=21

Housing America's Workforce: Case Studies and Lessons for the Experts (2012)
http://uli.bookstore.ipgbook.com/housing-america-s-workforce-products-9780874202038.php?page_id=21

Terwilliger Roundtable Luncheon: New Best Practices Format

The ULI Terwilliger Center for Housing was established in 2007 with a focus on workforce housing (defined as housing affordable those earning 60 to 120 percent AMI). In 2012, the Center expanded its mission to cover the full spectrum of housing—including affordable and workforce housing—and is in the process of transitioning its program of work and existing products to meet this broader focus.

As part this repositioning, the Center is developing a **new best practices case study product** designed to cover a range of housing solutions demonstrated through developments and public policy. The Terwilliger Center, and ULI, has a long history of developing case studies which in the past have been published as for-sale books. The new case study product will be available in timely, user-friendly online format to ensure broad access. We need your help in identifying three components to the new best practices case studies: (1) the best method in which it will be presented online (i.e., PDF, HTML), (2) key pieces of information you most want see, and (3) topics that you would like to see covered. You can make a difference in how the research is presented by simply providing us with your feedback!

Questions to Consider:
1. What is the most useful method of obtaining resources from the internet? Do you prefer PDF over HTML?
2. How often do you print case studies from the internet? When printing, do you prefer a printer-friendly format with only text?
3. How do you use the case study information?
4. What key pieces of information are you most interested in? Example: finance, overcoming regulatory barriers, etc.
5. Do you find the developer interviews to be useful?
6. What topics would you like to see covered?
7. How long should the best practices be? Do you like to see a quick overview of the project or do you like to see an in-depth analysis?
8. How often should these best practices be published?
9. Should readers have the option to sign up to receive notifications of when a new best practice is posted online?
10. Do you like to see several images (5+) or do you just like to see a couple of images to give you an idea of the project?

Existing Format

In the 2012 *Housing America's Workforce: Case Studies* and Lessons from the Experts, the case studies typically included the following elements:

1. Development Detail – Project Data
   a. Developer
   b. Public Partners
   c. Design Architect
   d. Housing Unit Types
   e. Occupancy Rate
   f. Project Affordability
   g. Area Median Income
   h. Development Timeline
2. Introduction
   a. Overview of the entire project
   b. Location, unique characteristics of location
   c. Background on the developer
   d. Highlight how the project improves housing affordability
   e. Why was the project initiated? (transition sentence to "the problem" section)
3. The Problem
   a. Identify the problem. If redevelopment, was it blight? Was there shortage of affordable housing? Disconnect between work and home? Etc.
   b. Indicate affordability factor
   c. Community resistance
   d. Zoning problems
4. The Solution
   a. Financing
   b. Detailed description of units, and cost
   c. Zoning solutions – rezoning?
   d. How was community resistance addressed?
5. The Product
   a. Unique characteristics of project
   b. Sustainable features?
   c. Architecture
   d. Neighborhood compatibility
6. Conclusion
   a. What did this project accomplish?
7. Interview
   a. Lessons learned from developer
   b. Lessons learned from other partners, if available.