

## **PDC Project Plan Overview**

### **1. Project Overview**

Virginia Housing has set a goal to develop 10 new housing units per \$1,000,000 provided in the PDC Housing Development Grant, awarded to all PDC's in the Commonwealth. This grant opportunity allows for Rappahannock Rapidan Regional Commission (RRRC) to work through the planning phases to develop the program, identify potential projects, and identify partnerships during the first 12 months. The following 2 years are expected to involve pre-development and the development phases of the project(s) with projects to completed by June 30<sup>th</sup> 2024.

### **2. Schedule Overview**

To be provided by the Task and Activities Matrix. All dates are estimates and may be adjusted as necessary to accommodate actual activities as the program is developed.

### **3. Dependencies and Deliverables**

Based on the Phases as outlined by Virginia Housing, RRRC staff has identified the associated tasks with each phase, the timeframes for the tasks, and the potential deliverables associated with each phase. Each phase is outlined based on the anticipated role all potential partners are expected to participate in. RRRC staff anticipates participating as the program developer and regional coordinator, conducive to project oversight as required by agreement with Virginia Housing.

### **4. Key Individuals**

Successful implementation may depend on the participation of representation of local governments, service providers, (non-profit) developers, and community leadership. Through the PDC Housing Development Grant, Virginia Housing has provided an opportunity to develop a partnership tasked with filling identified housing gaps both locally and at the regional level. The Partnership Framework outlines the interrelationships with anticipated program and project partners. The Regional Commission shall act as a regional project coordinator and grant manager in keeping with the expected role established by Virginia Housing. This means that the Commission will not directly be developing or managing the projects, but rather building a collaborative and coordinated effort to address regional housing goals and objectives.

## PDC Grant phases and Task matrix

Phase 1 Program Design (Work Plan)			
Task	Who	Tasks and Actions	Timeframe
Organizational Assessment	RRRC STAFF	<p>Identify internal capacity, staff assets, and technical skills, program/ project roles, etc.</p> <p>Introduce Virginia Housing’s grant program and receive feedback from stakeholders/ partners.</p> <ul style="list-style-type: none"> <li>✓ Outreach to potential partners.</li> <li>✓ Form housing stakeholder workgroup committee.</li> </ul> <p>Organize task matrix and project time frame. Partnership framework development. Define governance and project structure.</p> <ul style="list-style-type: none"> <li>✓ List recommendations and document feedback, identify common threads.</li> </ul>	Months 1-3 (July to Sept 2021)
Identify Priorities and Key Initiatives	RRRC STAFF	<p>Identify key initiatives the program can support in collaboration with local governments, based on Local Comprehensive Plan(s) and planning partner feedback.</p> <p>Identify priorities based on FHN and Regional Housing Study data to build a strategy framework/ blueprint.</p> <ul style="list-style-type: none"> <li>✓ Underserved households and housing gaps.</li> <li>✓ Current projects and proposed projects.</li> <li>✓ Ideal projects to fill in gaps.</li> <li>✓ Develop strategies to maximize housing development impacts.</li> </ul> <p>Draft project criteria standards outline.</p>	Months 3-6 (Sep to Dec, 2021)
	Housing Subcommittee	Provide input and oversight on regional priorities.	
	Stakeholder workgroup	<p>Provide input and feedback on local and regional priorities; community needs and equity issues.</p> <p>Identify/ Introduce potential projects and locations, County, Town, and/or Community/Neighborhood level.</p>	Months 4-7 (Oct 2021 to Jan 2022)

Identify Program and Ideal Projects  (Program outline, project targets, goals, and objectives)	RRRC STAFF	<p>Program plan and task phase outline based on VH criteria and expectations:</p> <ul style="list-style-type: none"> <li>✓ Program limits and timelines.</li> <li>✓ Synthesize with identified priorities.</li> </ul> <p>Draft project assessment standards:</p> <ul style="list-style-type: none"> <li>✓ Identify goals, objectives, and expected outcomes.</li> <li>✓ Identify housing gaps; targeted household population.</li> </ul> <p>Research best practices* and present:</p> <ul style="list-style-type: none"> <li>✓ Current and innovative construction trends.</li> <li>✓ Missing middle and innovative housing models.</li> <li>✓ Universal design standards</li> <li>✓ Sustainable/green building and energy efficiency</li> <li>✓ Homeownership financing models and/or programs.</li> <li>✓ Economic and community impacts.</li> </ul> <p>*May inform project assessment standards</p>	Months 2-4 (Nov 2021 to Mar 2022)
	Housing Subcommittee	Provides oversight and input as necessary.	
	Stakeholder workgroup	<p>Provides input and/or feedback based on:</p> <ul style="list-style-type: none"> <li>✓ Regional Housing Study recommendations.</li> <li>✓ Regional and local housing and household data.</li> <li>✓ Initial strategy development.</li> </ul> <p>Generates local and regional innovative solutions and ideas.</p>	Months 5-8 (Nov 2021 to Mar 2022)
Document program strategies and awareness strategies	RRRC STAFF	<p>Provide opportunities for program development awareness and potential funding or other resources.</p> <p>Diverse housing/ missing middle housing/ workforce housing/ affordable housing definitions and criteria.</p> <ul style="list-style-type: none"> <li>✓ Ability to address current and evolving needs.</li> <li>✓ Most effective strategies.</li> <li>✓ Deed of trust strategies.</li> <li>✓ Live-work model- code allowance?</li> <li>✓ Incremental development strategy.</li> <li>✓ Public education and support strategies.</li> </ul>	Months 4-6 (Oct to Dec 2021)

	Housing Subcommittee	Provides oversight and input as necessary.	
	Stakeholder workgroup and/or Development Partners	Communicate and/ or collaborate with RRRC on strategies as applicable: <ul style="list-style-type: none"> <li>✓ Community outreach to address concerns and pushback.</li> <li>✓ Community input and feedback.</li> <li>✓ Diverse housing models development.</li> <li>✓ Incremental development.</li> <li>✓ Ability to maintain affordability strategies.</li> </ul>	Months 6+ (Dec -?)
(Initial) Partner identification and outreach	RRRC STAFF	Outreach and form partnership: <ul style="list-style-type: none"> <li>✓ PDC Grant Program Introduction.</li> <li>✓ Identify potential stakeholder workgroup. and/or development partners.</li> <li>✓ Developer partners identified.</li> </ul>	Months 2-11 (Aug 2021 to May 2022)
	Stakeholder Workgroup	Collaborates with RRRC Staff. Provides input and feedback.	Months 7-11 (Mar to May 2022)

Phase 2 Investment Plan			
Task	Who	Tasks and Actions	Timeframe
(Grant Fund) Investment plan documentation	RRRC STAFF	<p>Financial documentation, at a minimum, to include:</p> <ul style="list-style-type: none"> <li>✓ Type of projects intend to invest funds in.</li> <li>✓ Funding priorities and why and how funds to be distributed to support these priorities.</li> <li>✓ How plan to use funding to meet objectives.</li> <li>✓ Any type of income or revenue generated by PDC grant related activities.</li> </ul> <p>Program and/or project investment, at a minimum to include:</p> <ul style="list-style-type: none"> <li>✓ Project Assessment and parameters.</li> <li>✓ Process of project selection and why.</li> <li>✓ Target purchase price of products and/or services.</li> <li>✓ Process and criteria for homeowners' selection.</li> <li>✓ Process and/or program development to assure affordability.</li> </ul> <p>Identify additional funding sources and how intended to/ may be applied.</p>	Months 5-8 (Nov 2021 to Apr 2022)
	Housing Subcommittee	Provides oversight, input, and feedback on Investment Plan.	
	Stakeholder workgroup/ Development partners	Provide input and feedback on investment plan if/where applicable.	Months 7-10 (Jan to Apr 2022)
Identify process which program income will be reinvested in the project	RRRC STAFF	<p>Provide Virginia Housing guidance and expectation to stakeholder workgroup and/or development partners as applicable.</p> <p>Research best practices and provide applicable examples if required/ necessary.</p>	Months 4-8 (Oct 2021 to Feb 2022)

	Stakeholder workgroup and/or Development Partners	Identify potential opportunities for program reinvestment at a local or region level.  Local program reinvestment may include: <ul style="list-style-type: none"> <li>✓ Home ownership assistance.</li> <li>✓ Rental development.</li> <li>✓ Additional development programs.</li> </ul>	Months 5-12 (Nov 2021 to Jun 2022)
Identify responsible person for tracking program income and reinvestment	RRRC STAFF/ Housing Subcommittee	Appointed RRRC staff if applicable and as approved by Housing Subcommittee.	Months 5-9 (Nov 2021 to Mar 2022)
	Development partners	Main point of contact person if applicable or otherwise specified as necessary, as spelled out in RFP and/or contract/ signed MOU's/MOA's. Documented intent per VH objectives for VH records.	
Ensure line of credit	RRRC STAFF		
	Development Partners		
Recruitment strategy processes and mechanism (such as RFP's and such)	RRRC STAFF	Establish the process method for advertising requests for proposals, and recruiting.  Identify decision-making criteria. <ul style="list-style-type: none"> <li>✓ Key points to determine process.</li> <li>✓ Measurements and/or guidelines to determine final choices.</li> <li>✓ Be able to justify final choices.</li> </ul> Proposal due date or rolling proposal method to be determined.	Months 6-8 (Dec 2021 to May 2022)
	Housing Subcommittee	Provides final approval, oversight, and input as necessary.	
	Stakeholder Workgroup	Provides input and feedback.	Months 8-11 (Feb to May 2022)

Phase 3 Partnership Development (Work Plan)			
Task	Who	Tasks and Actions	Timeframe
Partner selection	RRRC STAFF	Identify key stakeholder partners. Convenes stakeholder workgroup. Individual and organizational roles defined. <ul style="list-style-type: none"> <li>✓ Based on expertise and commitment/interest level.</li> <li>✓ Capacity and willingness to participate</li> </ul> To provide support as needed and/or requested.  Identify and partner with housing developers.	Months 2-11 (Aug 2021 to May 2022)
	Housing Subcommittee	Final approval on development partners as necessary/ if required.	Months 10-12 (Apr to Jun 2022)
	Stakeholder workgroup and/or Development partners	Partner selection to be based on project stage(s) as determined appropriate and/or necessary.  To provide and/or report status and updates on a scheduled basis; keep RRRC staff informed of stages and progress.	Months 4-36 (Oct 2021 to June 2024)
Partnership guidelines development	RRRC STAFF	Develop PDC partnership framework. Accepts feedback and input, develops drafts. Reports final draft to Housing Subcommittee.	Months 1-5 (July to Nov 2021)
	Housing Subcommittee	Provide input and final approval.	Months 4-7 (Oct 2021 to Jan 2022)
	Stakeholder workgroup	Provides input and feedback on Partnership Framework.	Months 3-5 (Sep to Nov 2021)
Obtain signed agreements	RRRC STAFF/ Housing Subcommittee	Accepts MOU's/ MOA's, and contractual agreements as and when appropriate.	Months 4-12 (Oct 2021 to June 2022)
	Stakeholder workgroup	Provide input and feedback. Partner with developers, non-profits, and/or local government staff if/as appropriate.	Months 5-11 (Nov 2021 to May 2022)
	Developer Partners	Prepares project proposal based on RFP requirements. Upon project selection, signs contractual agreement.	Months 8-12 (Feb to Jun 2022)

Phase 4 Project Analysis (Implementation Plan: proposal and funding request)			
Task	Who	Tasks and Actions	Timeframe
PDC identifies project manager and review panel	RRRC STAFF	Project manager role defined. May act as liaison between agencies and/or organizations as deemed appropriate or necessary. Convenes review panel as appropriate and/or necessary.	Months 9-36 (Mar 2022 to Jun 2024)
	Housing Subcommittee	Provides input and oversight as necessary.	
	Stakeholder workgroup	Individual and organization participatory roles defined if applicable.	
	Developer Partners	Designates point of contact to communicate and coordinate with RRRC staff.	Months 8-36 (Feb 2022 to June 2024)
Project analysis and comparison conducted.  (To be conducted in conjunction with Phase 6: Design Assessment)	RRRC STAFF	Project standards established based on stakeholder workgroup input and feedback. <ul style="list-style-type: none"> <li>✓ Project assessment criteria.</li> <li>✓ Draft strategies milestone checkpoints.</li> <li>✓ Local and regional priorities/ key initiatives.</li> <li>✓ Type of funding request.</li> </ul> Accepts bid/ requests for funding applications.  Assist in additional funding sources identification if applicable and/or requested.	Months 5-12 (Nov 2021 to Jun 2022)
	Housing Subcommittee	Provides oversight and final decision for projects proposals if deemed necessary and/or appropriate.	
	Stakeholder workgroup	Identify additional funding sources.  Provides and feedback on applicable/ appropriate projects.	Months 7-11 (Jan to May 2022)
	Developer Partners	Expected to provide RRRC as specified, at minimum, in contract/ MOU/ MOA: <ul style="list-style-type: none"> <li>✓ Proposed project details</li> <li>✓ Anticipated outcomes</li> </ul>	

		<ul style="list-style-type: none"> <li>✓ Targeted household income demographic intended to serve.</li> <li>✓ Scope and cost.</li> <li>✓ Anticipated cost gap covered by grant funding.</li> <li>✓ Project stages/phases and completion parameters.</li> </ul>	
Project scope and cost identified; parameters for completion determined.	RRRC STAFF	To be documented per VH requirements. Based on proposed projects: <ul style="list-style-type: none"> <li>✓ Projected outcomes.</li> <li>✓ Completion tasks/ steps.</li> </ul>	Months 8-12 (Feb to Jun 2022)
	Housing Subcommittee	Provides expertise guidance and input.	
	Stakeholder Workgroup	Provides input, feedback, and/or assistance as applicable/appropriate.	
	Developer Partnership	Expected to provide to RRRC: <ul style="list-style-type: none"> <li>✓ Projected project costs and identifies the portion that grant funding is requested to cover.</li> <li>✓ Anticipated process timeframe.</li> <li>✓ Anticipated outcomes.</li> <li>✓ Contingency plans.</li> </ul>	
Project stages identified.  Action plan: project design; outcome tracking and evaluation.	RRRC STAFF	PDC Action plan stage development blueprint. <ul style="list-style-type: none"> <li>✓ Based on designated program role and appropriate involvement level.</li> </ul> Monitoring of program/project stages and activities blueprint. <ul style="list-style-type: none"> <li>✓ Process and outcome tracking development.</li> <li>✓ Evaluation</li> <li>✓ Create Milestone checkups</li> </ul> Documented per VH requirements.	Months 8-12 (Feb to Jun 2022)
	Housing Subcommittee	Receive updates, provide input and feedback, direction and/or guidance.	

	Stakeholder workgroup	Provide input and feedback. <ul style="list-style-type: none"> <li>✓ Design and development input.</li> <li>✓ Outcome tracking input.</li> <li>✓ Support.</li> <li>✓ Community Engagement.</li> </ul>	
	Developer Partners	Project stages per Virginia Housing expectations, as spelled out in contract/ MOU/ MOA. <ul style="list-style-type: none"> <li>✓ Identified and outlined in project proposal</li> <li>✓ To include anticipated timeframe of each stage.</li> <li>✓ To include outline of anticipated activities identified per stage.</li> </ul>	

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Phase 5 Project Selection (Implementation Plan: accepted proposals)			
Task	Who	Tasks and Actions	Timeframe
Project(s) to be implemented/ selected.	RRRC STAFF	Measures proposed project(s) against project assessment standard criteria.  Determines course of action and/or project(s) to be implemented.  Provides final report and/or decision to Housing Subcommittee.	
	Housing Subcommittee	Provides oversight through direction and input on proposed project, if applicable.	
	Stakeholder workgroup	Based on Phase 4 and 6, provide feedback on 2-5 projects for consideration.	
Identify and document required resources, activities, and tasks for each phase.	RRRC STAFF	Identifies additional resources where/if applicable. Provides support as permissible by RRRC Board.	Months 5-12 (Nov to Jun 2022)
	Housing Subcommittee	Provides oversight, input, and feedback on tasks as applicable/ required.	
	Stakeholder workgroup	Provides feedback and input.	Months 8-11 (Feb to May 2022)
	Development Partnership	Identify and secure additional needed resources. Provides finalized document of timelines, and funding requests where applicable.	Months 8-11 (Feb to May 2022)
Document action plan and milestones based on scope of work.	RRRC STAFF	Determined per project in collaboration with developer proposals, timelines, and associated tasks defined in each step. Milestone measurement to be developed per accepted project bids.	Months 8-12 (Feb to Jun 2022)
	Development Partners	Provides complete documentation of action plan and milestone per Virginia Housing requirements and contract/ MOU/MOA to RRRC staff.  Provides contingency plan.	Months 8-12 (Feb to Jun 2022)

Phase 6 Project Design Assessment (Implementation Plan)			
Task	Who	Tasks and Actions	Timeframe
Assessments to identify opportunities for innovation, eco-friendly, and universal design to be conducted.	RRRC STAFF	Analysis of applicable models, construction methods, and etc. based on Stakeholder workgroup and Housing Subcommittee input and feedback.	Months 3-6 (Sep to Dec 2021)
	Housing Subcommittee	Provide oversight and feedback on as necessary.	
	Stakeholder workgroup	Identify supportable opportunities to apply innovation, eco-friendly, and universal design.	Months 5-9 (Nov 2021 to Mar 2022)
Elements of innovation, eco-friendly, and universal design to be identified. (In conjunction with Phase 4, "Project analysis and comparison conducted".)	RRRC STAFF	Identify applicable elements of innovations, housing models, eco-friendly, and universal design options in collaboration with Stakeholder Workgroup.	Months 4-8 (Oct 2021 to Feb 2022)
	Stakeholder workgroup	Identify guidelines, wish list, etc.	
Identify where elements of innovation, eco-friendly, and universal design to be implemented. (In conjunction with Phase 4, "Project analysis and comparison conducted".)	RRRC STAFF	Define applicable elements, and strategies to implement elements of innovation, eco-friendly, and universal design are best suited. Provide educational engagement opportunities- diverse and missing middle housing.	Months 7-10 (Jan to May 2022)
	Stakeholder Workgroup	Provide input and feedback.	Months 7-10 (Jan to May 2022)