

## 2020 Housing Opportunity Grant Level 2 Application

**Status:** Started

**Date Submitted:** This application has not been submitted.

**Submitted By:** rcastle@cciaor.com

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**Does the proposed activity adhere to the stated requirement?** Yes

**First Name:** Ryan

**Last Name:** Castle

**Contact Title:** CEO

**Contact Email:** rcastle@cciaor.com

**Contact Phone:** 5089574300

**State:** MA

**Association:** CAPE COD & ISLANDS ASSOCIATION OF REALTORS® INC

**Association ID:** 4480

**Address 1:** 22 Mid-Tech Drive

**Address 2:** 22 Mid Tech Drive

**City:** West Yarmouth

**Zip:** 2673

**Association AE First Name (if different from above):**

**Association AE Last Name (if different from above):**

**Association AE Contact Email (if different from above):**

### Activity Details

Please check the box of the application deadline for which you are applying.: January 15

**NOTE: Associations cannot receive funding for activities previously supported by a Housing Opportunity grant (ex. recurring events such as housing expos or classes) Contact NAR staff at [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org) if you questions about eligibility.**

Review the [frequently asked questions](#) and [Tip Sheet](#) before completing the application.

**Amount Requested (Max \$5000):** \$2,500

**1. Date of activity (or timeframe if an ongoing activity):** 2020-03-01

**2. What type of activity are you planning?:** Consumer class/education

**Other:**Class/education for elected and appointed officials

**3. Will the grant be funding a project in a rural community within your association's jurisdiction? Note that the Rural Housing Service defines "rural" as areas with less than 30,000 population and rural in character.:** No

**4. Describe the proposed activity including specific details about how the activity will be executed.:** The Cape Cod & Islands Association of REALTORS are partnering with the Housing Assistance Corporation of Cape Cod to educate elected and appointed officials on housing affordability and availability issues. This is a series of in-depth trainings for municipal officials to learn specific tools and strategies to address our region's housing crisis. The interactive trainings will be focused on helping participants identify next steps for moving housing initiatives forward in their town. There will be three sessions with the topics below: - Zoning Reform and Encouraging Redevelopment - Breathing Life into Your Housing Production Plan - Identifying Priority Parcels for Housing Development

**5. Why is the association interested in conducting this activity?:** Housing affordability and availability is a top priority for the Association. We have partnered with the Housing Assistance Corporation on a lot of initiatives and through our advocacy efforts we have found that municipal officials both elected and appointed (like planning board and affordable housing committees, and even staff) do not have the knowledge or resources to handle housing and development related

issues. In concert with HAC, we have developed training programs to educate and ensure these elected and appointed officials understand the basics of land use, development, and housing principles.

**6. What are the outcomes that the association expects to accomplish through this activity?:** That are elected and appointed officials in towns are more equipped and knowledgeable to work on ways to boost housing affordability and attainability. From the Association perspective, it is to position the Association as the solution, not the problem. We consistently talk about what we don't want towns to do, but this way we are positioned as the educator and the expert on the topic to help these folks through the issues of housing affordability.

**7. How will the association measure the success of the activity?:** The amount of elected and appointed officials that attend is definitely the first and easiest metric to measure. The longer and harder metric is what these towns do with the information to pass measures that boost affordability and availability.

**8. How will this activity help the association achieve its housing advocacy goals?:** This activity positions REALTORS as those with the solutions and helps educate those making decisions for the community with the information.

**9. How will REALTORS® be involved in the planning and implementation of the activity?:** This is more of an Association staff driven thing as staff is involved in planning and marketing the sessions in conjunction with the Housing Assistance Corporation. Many of our members will also be attending as they themselves are elected or appointed officials.

**10. How will association staff be involved in the planning and implementation of the activity?:** Our CEO Ryan Castle works with HAC on developing the content of the program and will be in the room during training as an available expert. In addition, the sessions are being held at the Association's office, so our facilities coordinator is responsible for planning the event itself in terms of logistics.

**11. List any organizations that will partner with your association in the activity. Describe their role(s) in the activity.:** Housing Assistance Corporation is our partner

## Budget Details

12. Please provide your budget in the table below. If needed, provide additional details in response to question #13.

- REALTOR® association staff time/hours
- Fundraising contributions
- Money to hold a fundraiser
- General operating expenses
- Donations to an organization or person
- Cash prizes or payment for gifts and prizes
- Materials for the construction or rehab of a home/building
- Landscaping materials
- Home furnishings

**Note: Associations are encouraged to use the majority of grant funds for expenditures related to the development and implementation of an activity (such as speaker fees, marketing, printing, etc.) rather than venue and catering costs.**

12. Please provide your budget in the table below. If needed, provide additional details in response to question #13

### Revenue

Housing Opportunity Program Grant (enter requested amount)	\$2,500
Contribution from your association = 10% of grant request	\$250
Contribution from other REALTOR® association(s)	\$0
Contribution from non-REALTOR® collaborating partners	\$0
Admission fee/tickets	\$0
Revenue from sponsors (e.g., booth rental, payment for advertising, etc.)	\$0
Town of Falmouth	\$500
Cape Cod Foundation	\$500

### Expenditures

Expenditures	\$0
Venue rental	\$0
Catering/refreshments	\$500
Marketing	\$500
Speaker fees	\$1,250
Speaker expenses (travel, lodging, meals)	\$500
Books	\$1,000

13. Additional Budget Information: If applicable, use the space below to: provide explanations for "other" revenue or expenses noted above; provide an estimated number of attendees for activities with an admission fee; provide a breakdown of consulting fees; or provide details about in-kind contributions the association will make toward the activity.: Venue Rental is in-kind by the Association

14. For local associations: The state association must be notified of this funding request. Provide the name and title of the person at the state association most familiar with the request.

First Name Association Contact: Justin

Last Name Association Contact: Davidson

Association Staff Email: jdavidson@marealtor.com

15. In reference to THIS activity, as described in question #4, has your association applied for funding from another NAR grant program including Smart Growth, Diversity, Placemaking, or Issues Mobilization?: No

16. If this funding request is approved, do you give NAR permission to share your application with others (either directly or on the REALTOR® Party website) as an example of a successful application?: Yes

**NOTE: Application must either be submitted by the AE or the AE must be copied on the submission. Email completed application to [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org).**

EXAMPLE

## 2020 Housing Opportunity Grant Level 2 Application

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**First Name:** Ryan

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**Contact Title:** CEO

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### Revenue

Housing Opportunity Program Grant (enter requested amount)	\$2,500
Contribution from your association = 10% of grant request	\$250
Contribution from other REALTOR® association(s)	\$0
Contribution from non-REALTOR® collaborating partners	\$0
Admission fee/tickets	\$0
Revenue from sponsors (e.g., booth rental, payment for advertising, etc.)	\$0
Town of Falmouth	\$500
Cape Cod Foundation	\$500

### Expenditures

Expenditures	\$0
Venue rental	\$0
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Marketing	\$500
Speaker fees	\$1,250
Speaker expenses (travel, lodging, meals)	\$500
Books	\$1,000

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First Name Association Contact: Justin

Last Name Association Contact: Davidson

Association Staff Email: jdavidson@marealtor.com

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16. If this funding request is approved, do you give NAR permission to share your application with others (either directly or on the REALTOR® Party website) as an example of a successful application?: Yes

**NOTE: Application must either be submitted by the AE or the AE must be copied on the submission. Email completed application to [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org).**

EXAMPLE

# 2020 Housing Opportunity Grant - Level 2 Application

Status: Submitted

Date Submitted: 2020-09-02 20:29:30

Submitted By: spalmer@ncrealtors.org

Does the proposed activity adhere to the stated requirement? Yes

First Name: Seth

Last Name: Palmer

Contact Title: Director of Regulatory Affairs and External Communications

Contact Email: spalmer@ncrealtors.org

Contact Phone: 9195730992

Association: NORTH CAROLINA ASSOCIATION OF REALTORS® INC

Association ID: 864

Address 1: 4511 Weybridge Lane

Address 2:

City: Greensboro

State: NC

Zip: 27407

Association AE First Name (if different from above): Andrea

Association AE Last Name (if different from above): Bushnell

Association AE Contact Email (if different from above): abushnell@ncrealtors.org

## Activity Details

Please check the box of the application deadline for which you are applying.: September 15

**NOTE: Associations cannot receive funding for activities previously supported by a Housing Opportunity grant (ex. recurring events such as housing expos or classes) Contact NAR staff at [HousingOpportunityGrants@realtors.org](mailto:HousingOpportunityGrants@realtors.org) if you questions about eligibility.**

Review the [frequently asked questions](#) and [Tip Sheet](#) before completing the application.

Amount Requested (Max \$5000): \$5,000

1. Date of activity (or timeframe if an ongoing activity):: 2020-09-23

2. What type of activity are you planning?: Forum/workshop

3. Will the grant be funding a project in a rural community within your association's jurisdiction? Note that the Rural Housing Service defines "rural" as areas with less than 30,000 population and rural in character.: No

4. Describe the proposed activity including specific details about how the activity will be executed.: NC REALTORS State of Real Estate: A discussion on the state of North Carolina's housing market and the challenges and opportunities facing it. Event Website: <https://stateofrealestatenc.com> While we know that the state of our state's housing market was under pressure before COVID-19 due to inventory supply and affordability, the global pandemic has only amplified those challenges. As the voice of real estate, NC REALTORS® is uniquely qualified to convene a comprehensive conversation on the state of North Carolina's housing market. Join us for virtual discussions with nationally-recognized speakers and state leaders on Wednesday, September 23, and Thursday, September 24. Agenda: - What is the nation's state of housing and how does the future look? (Speaker TBD) - North Carolina's Housing Picture: Affordable or Affordability Challenged (Samuel Gunter, Executive Director, North Carolina Housing Coalition; Scott Farmer, Executive Director, North Carolina Housing Finance Agency; Michael Neal, Senior Research Associate, Housing Finance Policy Center at the Urban Institute) - A Deep Dive into the Data Story of Housing (Dr. Jessica Lautz, Vice President of Demographics and Behavioral Insights, National Association of REALTORS®; George Ratiu, Sr. Economist, Realtor.com®; Robert Dietz, Chief Economist & Senior Vice President for Economics & Housing Policy, National Association of Home Builders) - The Future of Housing Affordability (Tiffany Manuel, President, and CEO, TheCaseMade) - Rethinking Housing Before, During, and After COVID-19 (Michael A. Stegman, Ph.D., Senior Housing Policy Fellow, Milken Institute Center for Financial Markets) - Policy Responses to Housing Challenges (Salim Furth, Senior

**5. Why is the association interested in conducting this activity?:** Housing is at the core of our industry and our state. Even prior to the pandemic, the state of housing in North Carolina was fraught. From historically low inventories in almost every market to true challenges in housing affordability, we know we have to take a real, deep look into how we can move forward in a productive manner. We have been fortunate to bring in leading voices in the conversation about our nation's housing future so we know we will be greatly benefited through this engagement.

**6. What are the outcomes that the association expects to accomplish through this activity?:** We hope that the conversation at a state and local level is able to move forward productively as a result of this event. While we know that this is not a single solution endeavor, so engagement amongst participants must be encouraged, especially in a virtual setting. Because of this, we are offering "Daily Digest" sessions to attendees at the end of each day with facilitated discussions. We also expect that much of the information which is presented will also be used by the Association's Legislative Committee in the development of its biennial Legislative Policy Statement.

**7. How will the association measure the success of the activity?:** First and foremost, it is the future facilitation of discussions on this topic. We do not expect that one meeting at one time will lead to real success in addressing all of the issues for our state of housing. But we do know that success can be realized through the next conversation and the multiple after that. We will also quickly be able to measure the success of the event in the response received to the post-event survey and facilitated discussions.

**8. How will this activity help the association achieve its housing advocacy goals?:** As REALTORS, housing is at the core of our business and our life. We have to fully understand the opportunities and challenges facing the industry to effectively move forward as our state continues to grow. By engaging thought leaders from multiple areas of the discussion, as well as focusing on numerous topic areas, we are presenting a diverse perspective that is entirely in alignment with NC REALTORS' goal of serving as the voice of North Carolina real estate.

**9. How will REALTORS® be involved in the planning and implementation of the activity?:** NC REALTORS leaders have served as sounding boards in the development of the topic areas, as well as in the securing of speakers. Many of these same leaders will serve as moderators for the sessions, as well as the "Daily Digest" networking sessions. NC REALTORS will also be involved in the future development of the legislative/advocacy activities which result from this event.

**10. How will association staff be involved in the planning and implementation of the activity?:** Association staff will serve as the technical moderators for the virtual sessions. They have also been heavily involved in the engagement and contracting of speakers. Staff will be responsible for producing all marketing materials pre- and post-event, and will also serve as moderators for small group networking sessions.

**11. List any organizations that will partner with your association in the activity. Describe their role(s) in the activity.:** Through speakers representing these organizations, we are partnering with: North Carolina Housing Coalition North Carolina Housing Finance Agency Urban Institute NAR Research realtor.com National Association of Home Builders Mercatus Center at George Mason University

## Budget Details

12. Please provide your budget in the table below. If needed, provide additional details in response to question #13.

- REALTOR® association staff time/hours
- Fundraising contributions
- Money to hold a fundraiser
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12. Please provide your budget in the table below. If needed, provide additional details in response to question #13

### Revenue

Housing Opportunity Program Grant (enter requested amount)	\$5,000
Contribution from your association = 10% of grant request	\$1,500
Contribution from other REALTOR® association(s)	\$0
Contribution from non-REALTOR® collaborating partners	\$0
Admission fee/tickets	\$0
Revenue from sponsors (e.g., booth rental, payment for advertising, etc.)	\$0
<b>Total</b>	<b>\$6,500</b>

### Expenditures

Consulting Fees	\$0
Venue rental (Virtual)	\$3,500
Catering/refreshments	\$0
Marketing	\$0
Speaker fees	\$3,000
Speaker expenses (travel, lodging, meals)	\$0
<b>Total</b>	<b>\$6,500</b>



**13. Additional Budget Information:** If applicable, use the space below to: provide explanations for "other" revenue or expenses noted above; provide an estimated number of attendees for activities with an admission fee; provide a breakdown of consulting fees; or provide details about in-kind contributions the association will make toward the activity.: We would request a special dispensation from the Committee to consider our application outside of the requirement that the requested event's date is at least 30 days after the application deadline selected. Due to a shift to a virtual platform, we have incurred additional expenses necessitating the overall grant request. We incurred a delay in receiving a full cost estimate which led to us not being able to submit during the August grant cycle.

**14. For local associations:** The state association must be notified of this funding request. Provide the name and title of the person at the state association most familiar with the request.

**First Name Association Contact:**

**Last Name Association Contact:**

**Association Staff Email:**

**15. In reference to THIS activity, as described in question #4, has your association applied for funding from another NAR grant program including Smart Growth, Diversity, Placemaking, or Issues Mobilization?:** No

**16. If this funding request is approved, do you give NAR permission to share your application with others (either directly or on the REALTOR® Party website) as an example of a successful application?:** Yes

EXAMPLE