

**CONTRACT FOR  
AFFORDABLE HOUSING CATALYST PROGRAM SERVICES BETWEEN  
FLORIDA HOUSING FINANCE CORPORATION  
AND  
FLORIDA HOUSING COALITION, INC.**

This Contract for Affordable Housing Catalyst Program Services #003P-2024 (Contract) is entered into by and between the FLORIDA HOUSING FINANCE CORPORATION (Florida Housing), a public corporation and a public body corporate and politic, with headquarters located at 227 North Bronough Street, Suite 5000, Tallahassee, Florida, 32301, and FLORIDA HOUSING COALITION, INC. (Contractor), located at 1311 N. Paul Russell Rd., B-201, Tallahassee, Florida, 32301. Upon execution by both parties, this Contract shall become effective as of the date the last party signs or July 1, 2025, whichever is later (Effective Date).

**RECITALS**

- A. The Contractor represents that it is fully qualified and possesses the requisite skills, knowledge, qualifications and experience to provide the required services and offers to perform those services described in Exhibit A attached hereto and incorporated herein.
- B. Florida Housing has a need for such services and does hereby accept the offer of the Contractor upon the terms and conditions outlined in this Contract.
- C. Florida Housing has the authority pursuant to Florida law to direct disbursement of funds for compensation to the Contractor under the terms and provisions of this Contract.

**AGREEMENT**

NOW, THEREFORE, for valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

**A. RECITALS**

The Recitals set out above are true and correct and are incorporated into and made a part of this Agreement.

**B. ATTACHMENTS**

This Contract has the following attachments, which are incorporated herein:

Exhibit A, Scope of Work  
Exhibit B, Deliverables  
Exhibit C, Fees

#### **C. ENGAGEMENT OF THE CONTRACTOR**

The Contractor agrees to provide services in accordance with the terms and conditions hereinafter set forth. The Contractor agrees to perform the services set forth in Exhibit A, and as otherwise stated in this Contract. The Contractor understands and agrees that all services under this Contract are to be performed solely by the Contractor, and may not be subcontracted or assigned without the prior written approval and consent of Florida Housing.

#### **D. TERM OF CONTRACT**

The term of this Contract shall be from the Effective Date through June 30, 2026.

#### **E. MODIFICATION OF CONTRACT**

Either party may request a modification of the provisions of this Contract. Modifications that are mutually agreed upon shall be valid only when reduced to writing and signed by the parties.

#### **F. INVOICES**

The Contractor shall submit invoices to the program contact person in Section K, Administration of Contract. Each invoice for fees shall be in a format that is clearly itemized so that the invoice states the specific services performed and when and where the services were performed. Payment of an undisputed invoice shall be made within a reasonable period of time not to exceed 30 days after receipt of the invoice. If an invoice is disputed, Florida Housing shall notify the Contractor in writing within 10 business days of receipt, specifying the basis for the dispute. Both parties shall work in good faith to resolve the dispute within 30 days. The Contractor shall not be reimbursed for any expenses unless expressly authorized in this Contract or pre-approved in writing by Florida Housing. Any pre-approved reimbursable expenses must be reasonable, necessary, and supported by appropriate documentation. If the Contractor is found to be in non-compliance with applicable Florida laws, federal laws, Florida Housing rules or Florida Housing policies governing its duties hereunder, or fails to perform its duties hereunder, any compensation received in connection with this Contract shall be subject to forfeiture to Florida Housing.

#### **G. FEES/COSTS**

The Contractor shall be compensated as described in the Fee Schedule attached hereto as Exhibit C. All compensation shall be in accordance with the terms of this Contract and shall constitute full payment for services rendered.

Contractor acknowledges and agrees that all compensation paid under this Contract constitutes taxable income, and the Contractor shall be solely responsible for all applicable federal, state, and local taxes.

#### H. LIABILITY: INDEPENDENT CONTRACTOR; COMPLIANCE WITH LAWS

1. Florida Housing shall not be deemed to have assumed any liability for the acts, omissions, or negligence of the Contractor, its agents, its servants, or employees, and the Contractor specifically accepts responsibility for its acts, omissions or negligence and for the acts, omissions or negligence of its agents, servants or employees, and shall defend and hold Florida Housing harmless from and against the claims of any party arising out of or claimed to arise out of any such acts, omissions, or negligence.

2. This Contract is executed on behalf of Florida Housing by the signatory only in his or her designated capacity as representative and on behalf of Florida Housing. Such individual shall neither have nor incur any individual or personal responsibility or liability under this Contract as a result of such execution.

3. Nothing herein shall be construed as a waiver of sovereign immunity by Florida Housing; it being the intent to reserve all such rights and immunities to the fullest extent of the law.

4. The Contractor, together with its agents, suppliers, subcontractors, officers, and employees, shall have and always retain under this Contract the legal status of an independent contractor, and in no manner shall they be deemed employees of Florida Housing or deemed to be entitled to any benefits associated with such employment. During the term of this Contract, the Contractor shall maintain at its sole expense those benefits to which its employees would otherwise be entitled to by law. The Contractor acknowledges that she is solely responsible for all applicable federal, state, and local taxes, including, but not limited to, income tax, self-employment tax, and all FICA and Medicare contributions. The Contractor is solely responsible for any insurance coverage related to work-related injuries or illnesses, and Florida Housing shall have no responsibility or liability for any such coverage.

5. The Contractor shall comply with all laws, rules, codes, ordinances, and licensing requirements that are applicable to the conduct of its business, including those of federal, state and local agencies having jurisdiction and authority. In addition, and by way of non-exhaustive example, the Contractor shall comply with Florida Housing policies while on Florida Housing premises and in the conduct of its business with Florida Housing personnel.

6. The Contractor specifically accepts responsibility for payment of all taxes, assessments, or contributions that may be required to be paid to any unit of government as a result of the payments being paid to or by the Contractor, if any, in conjunction with the services rendered pursuant to this Contract. At no time shall the Contractor make any commitments for or incur any charges or expenses for, or in the name of, Florida Housing.

7. The Contractor shall not be relieved of liability to Florida Housing for damages sustained by Florida Housing by virtue of any termination or breach of this Contract by the Contractor.

#### 1. DEFAULT AND REMEDIES

1. If any of the events listed in subparagraph 2. of this section occur, all obligations on the part of Florida Housing to continue doing business with the Contractor or assign any future transaction to the Contractor shall, if Florida Housing so elects, terminate and Florida Housing may, at its option, exercise any of its remedies set forth herein, or as otherwise provided by law. However, Florida Housing may continue doing business with the Contractor as a participant after the happening of any event listed in subparagraph 2. of this section without waiving the right to exercise such remedies, without constituting a course of dealing, and without becoming liable to include the Contractor in the transaction or any future transaction.

2. The Events of Default shall include, but not be limited to, the following:

a. If any report, information or representation provided by the Contractor in this Contract is inaccurate, false or misleading in any respect;

b. If any warranty or representation made by the Contractor in this Contract or any other outstanding agreement with Florida Housing is deemed by Florida Housing to be inaccurate, false or misleading in any respect;

c. If the Contractor fails to keep, observe, or perform any of the terms or covenants contained in this Contract, or is unable or unwilling to meet its obligations as defined in this Contract;

d. If, in the sole discretion of Florida Housing, the Contractor has failed to perform or complete any of the services identified in the attachments;

e. If the Contractor has not complied with all Florida laws, federal laws, Florida Housing rules or Florida Housing policies applicable to the work;

f. If the Contractor has discriminated on the grounds of race, color, religion, sex, national origin, disability, or any other legally protected status in performing any service identified in the attachments;

g. If the Contractor does not comply with the terms and conditions set forth in Section 420.512(5), Fla. Stat.;

h. If the Contractor commits fraud in the performance of its obligations under this Contract; or

i. If the Contractor refuses to permit public access to any document, paper,



letter, computer files, or other material subject to disclosure under Florida's Public Records Law.

Upon the occurrence of any Event of Default listed in subparagraph 2. above, Florida Housing will provide written notice of the Default detailing the grounds that constitute the Event of Default (Notice of Default), delivered by electronic mail to the email address set forth in Section K, Administration of Contract, herein.

3. Upon the occurrence of any Event of Default listed in subparagraph 2. above, Florida Housing may provide the Contractor a reasonable period of time to cure the Event of Default (Cure Period). If Florida Housing provides a Cure Period, Florida Housing will notify the Contractor of the length of the Cure Period in the Notice of Default.

4. If Florida Housing provides a Cure Period and if the Contractor is unable or unwilling to cure the Event of Default within the Cure Period, Florida Housing may exercise any remedy permitted by law. The pursuit of any one of the following remedies shall not preclude Florida Housing from pursuing any other remedies contained herein or otherwise provided at law or in equity. The remedies include, but are not limited to the following:

a. Florida Housing may terminate the Contract on the tenth (10<sup>th</sup>) day after the Contractor receives the Notice of Default or upon the conclusion of any applicable Cure Period, whichever is later;

b. Florida Housing may commence an appropriate legal or equitable action to enforce performance of the terms and conditions of this Contract;

c. Florida Housing may exercise any corrective or remedial actions including, but not limited to, requesting additional information from the Contractor to determine the reasons for or the extent of non-compliance or lack of performance, issuing a written warning to advise that more serious measures may be taken if the situation is not corrected, advising the Contractor to suspend, discontinue or refrain from incurring fees or costs for any activities in question or requiring the Contractor to reimburse Florida Housing for the amount of costs incurred; or

d. Florida Housing may exercise any other rights or remedies that may be otherwise available under law.

## **J. TERMINATION**

I. Florida Housing may terminate the Contract, without cause, at any time upon 10 days' written notice delivered by courier service or electronic mail to the Contractor at the address set forth in Section K, Administration of Contract, herein.

2. The Contractor may terminate this Contract, without cause, at any time upon 90 days' written notice delivered by courier service or electronic mail to Florida Housing at the physical or electronic address, as applicable, set forth in Section K, Administration of Contract, herein. The Contractor shall be responsible for all costs arising from the resignation of the Contractor and the costs associated with the appointment of and transition to a successor Contractor.

**K. ADMINISTRATION OF CONTRACT**

1. Florida Housing's contract administrator for this Contract is:

Contract Administrator  
Florida Housing Finance Corporation  
227 North Bronough St., Suite 5000  
Tallahassee, Florida 32301-1329  
Phone: 850.488.4197  
E-mail: Contract.Admin@floridahousing.org

2. The Florida Housing program contact for this Contract is:

Robert Dearduff  
Director of Special Programs  
Florida Housing Finance Corporation  
227 North Bronough St., Suite 5000  
Tallahassee, Florida 32301-1329  
Phone: 850.488.4197  
E-mail: Robert.Dearduff@floridahousing.org  
**or the designated successor.**

3. The Contractor's contract administrator for this Contract is:

Ashon Nesbitt  
CEO  
Florida Housing Coalition, Inc.  
1311 N. Paul Russell Rd., B-201  
Tallahassee, Florida 32301  
Phone: 850.878.4219  
Cell: 813.476.4170  
E-mail: Nesbitt@flhousing.org  
**or the designated successor.**

4. All written approvals referenced in this Contract shall be obtained from the parties' contract administrator or their respective designees.

5. All notices shall be given to the parties' contract administrator.

**L. PUBLIC RECORDS; CONFIDENTIALITY; COPYRIGHT, PATENT, TRADEMARK; FILES**

**1. Public Records**

Files Subject to Florida's Public Records Law: Any file, report, record, document, paper, letter, or other material received, generated, maintained or sent by the Contractor in connection with this Contract is subject to the provisions of Section 119.01-.15, Fla. Stat., as may be amended from time to time (Florida's Public Records Law). The Contractor represents and acknowledges that it has read and understands Florida's Public Records Law and agrees to comply with Florida's Public Records Law.

Pursuant to Section 119.0701(2)(b), Fla. Stat., the Contractor will be required to comply with public records laws, specifically to:

- a. Keep and maintain public records required by the public agency to perform the service.
- b. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the public agency.
- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the contractor upon termination of the contract or keep and maintain public records required by the public agency to perform the service. If the contractor transfers all public records to the public agency upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

Notwithstanding anything contained herein to the contrary, the provisions and requirements of this paragraph shall only apply if and when the Contractor is acting on behalf of Florida Housing.

**If the Contractor has questions regarding the application of Chapter 119, Florida Statutes, to the Contractor's duty to provide public records relating to this contract, contact the Corporation Clerk at:**

**Corporation Clerk  
227 N. Bronough Street, Suite 5000  
Tallahassee, Florida 32301-1329  
Phone: 850.488.4197  
E-mail: [Corporation.Clerk@floridahousing.org](mailto:Corporation.Clerk@floridahousing.org)**

**2. Confidentiality**

a. If the Contractor asserts that any information or materials intended to be delivered or provided under this Contract constitute a trade secret, or are otherwise confidential or exempt from the public records disclosure requirements of Florida's Public Records Law, such assertion must be made in writing to Florida Housing's Contracts Administrator upon submitting them to Florida Housing.

b. It is the Contractor's obligation and responsibility to maintain the secrecy of trade secrets and the confidentiality of other confidential information by adequately marking such materials as confidential or exempt before forwarding such information or materials to Florida Housing. It shall be the responsibility of the Contractor to defend the confidentiality of such materials, if necessary.

c. In the case of work product furnished to Florida Housing pursuant to this Contract that is confidential, the Contractor will treat such materials as confidential and will not reveal or discuss such materials or any other information learned as a result of this Contract with any other person or entity, except as authorized or directed by Florida Housing.

d. Working papers, copies, internal documents, procedures, methods and related materials considered confidential and/or proprietary shall be treated as confidential and/or proprietary and shall not be revealed or discussed with any other person or entity, except as authorized or directed by Florida Housing. All such records and materials will remain the property of Florida Housing.

e. If the Contractor is required to disclose or publish the existence or terms of transactions under this Contract pursuant to Florida's Public Records Law, then the Contractor shall notify Florida Housing in writing of such disclosure within two (2) days after receipt of the Public Records request.

### 3. Copyright, Patent and Trademark

a. If the Contractor brings to the performance of this Contract a pre-existing copyright, patent or trademark, the Contractor shall retain all rights and entitlements to that pre-existing copyright, patent or trademark unless the Contract provides otherwise.

b. If any discovery or invention arises or is developed in the course of or as a direct result of work or services performed under this Contract, the Contractor shall refer the discovery or invention to Florida Housing for a determination whether patent protection will be sought in the name of Florida Housing. Any and all patent rights accruing under or in connection with the performance of this Contract are hereby reserved to Florida Housing. In the event that any books, manuals, films, or other copyrightable material are produced, the Contractor shall notify Florida Housing in writing. Any and all copyrights or trademarks created by or in direct connection with the performance under this Contract are hereby reserved to Florida Housing.

c. All subcontracts or other arrangements entered into by the Contractor, with prior written approval and consent of Florida Housing, for the purpose of developing or procuring copyrightable materials (e.g. audiovisuals, computer programs, software, publications, curricula, research materials or training materials, etc.) shall specifically reference and reserve Florida Housing's exclusive rights to use and exploit copyrights and licenses to the extent permitted by copyright law and Florida Statutes.

### 4. Files

a. Contents of the Files: The Contractor shall maintain files containing documentation to verify all compensation to the Contractor in connection with this Contract, as well as reports, records, documents, papers, letters, computer files, or other material received, generated, maintained or filed by the Contractor in connection with this Contract. The Contractor shall also keep files, records, computer files, and reports that reflect any compensation it receives or will receive in connection with this Contract.

b. Retaining the Files: The Contractor shall maintain these files for five years after the fiscal year in which the files become inactive, except that, if any litigation, claim or audit is commenced with respect to the transactions documented by such files before the end of the aforementioned five-year period and extends beyond the expiration of the five-year period, these files will be retained until all litigation, claims, or audit findings involving the files have been resolved.

c. Access to the Files: Upon reasonable notice, the Contractor and its employees shall allow Florida Housing or its agent(s) access to its files during

normal business hours, 9:00 a.m. to 5:00 p.m., Monday through Friday, provided such day is not a holiday.

d. Return of the Files: In the event this Contract is terminated, all finished or unfinished documents, data, studies, computer files, correspondence, and other products prepared by or for the Contractor under this Contract shall be submitted to Florida Housing within 15 days of such termination at the expense of the Contractor.

#### **M. PERSONALLY IDENTIFIABLE INFORMATION (PII); SECURITY**

The laws of the State of Florida, including the State Cybersecurity Act, Section 282.318, Fla. Stat. (2021) and Florida Cybersecurity Standards, Chapter 60GG-2, F.A.C. (collectively, "Florida Law") and the Gramm-Leach-Bliley Act of 1999 (15 U.S.C. § 6801 et seq.) and the regulations promulgated thereunder, including, without limitation, the Interagency Guidelines Establishing Standards for Safeguarding Customer Information (collectively, the "Act"), impose various requirements regarding consumer privacy as well as the confidentiality, integrity, and accuracy of consumer information. Notwithstanding anything contained herein to the contrary, the provisions and requirements of this section shall only apply if and when the Contractor and its employees and/or agents may have access to certain confidential information of Florida Housing and nonpublic personal information pertaining to the customers of Florida Housing.

##### **A. Definitions.**

For the purposes of this section:

a. "Customer Data" means any and all data and information of any kind or nature submitted to Contractor by Florida Housing, or received by Contractor on behalf of Florida Housing, related to a natural person. Customer Data includes but is not limited to "nonpublic personal information" (as defined in the Act) necessary for Contractor to provide the Services, as well as "personal information" or "nonpublic information" as defined under Florida Law. Florida Housing shall remain the sole and exclusive owner of all Customer Data, regardless of whether such data is maintained on paper, magnetic tape, magnetic disk, personal computing devices (including but not limited to computers, tablets, smartphones, etc.), cloud computing systems maintained by Contractor or others on service provider's behalf, or any other storage or processing device.

b. "Confidential Information" shall mean all information designated by Florida Housing as confidential, including all Customer Data, and all information or data, whether marked or designated as confidential, concerning or related to Florida Housing's products, (including the discovery, invention, research, improvement, development, manufacture, or sale thereof), processes, or general business operations (including sales costs, profits, pricing methods, organization, and employee lists), and any information obtained through access to any of Florida Housing's information systems, including, without limitation, networks, network

services, computers, computer systems and communications systems (collectively, the "Information Systems"), which, if not otherwise described above, is of such a nature that a reasonable person would believe it to be confidential or proprietary. Confidential Information, other than Customer Data (which shall always remain confidential), shall not include: (a) information which is or becomes publicly available (other than by Contractor or such other party having the obligation of confidentiality) without breach of this Contract; (b) information independently developed by Contractor; or (c) information received from a third party not under a confidentiality obligation to Florida Housing.

B. Use of Confidential Information. Contractor shall not use, retain, copy, sell, transfer, publish, disclose, display, or otherwise make any of Florida Housing's Confidential Information available to any third party without the prior written consent of Florida Housing. Contractor shall hold the Confidential Information in confidence and shall not disclose or use such Confidential Information other than for the purposes contemplated by the Contract or in compliance with the requirements set forth in the Act, and/or Florida Law, and Contractor shall instruct all of its directors, officers, employees, agents, contractors and financial, legal and other advisors to whom it provides the Confidential Information (the "Representatives") to use the same care and discretion with respect to the Confidential Information that Contractor requires with respect to its own most confidential information, but in no event less than a reasonable standard of care, including the utilization of security devices or procedures designed to prevent unauthorized access to and processing of the Confidential Information. Contractor shall instruct its Representatives of its confidentiality obligations hereunder and not to attempt to circumvent any such security procedures and devices. Additionally, Contractor shall require that each of its Representatives agree to all of the same restrictions and conditions concerning Confidential Information to which Contractor is bound in this Contract. All Confidential Information shall be distributed only to persons having a need to know such information to perform their duties in conjunction with the Contract. Unless otherwise agreed in writing, the obligations set forth in this Section shall continue perpetually and survive the termination or expiration of the Contract for any reason. Further, upon request by Florida Housing or upon termination of the Contract, Contractor shall deliver to Florida Housing any Confidential Information in its possession and destroy any copies of Confidential Information in Contractor's files, unless otherwise required under operation of law.

C. Access to Information Systems. Access, if any, to Florida Housing's Information Systems is granted solely to perform the Services under the Contract and is limited to those specific Information Systems, time periods and personnel as are separately agreed to by Florida Housing and Contractor from time to time. Florida Housing may require the Representatives to sign individual agreements prior to accessing Florida Housing's Information Systems. Use of Florida Housing's Information Systems during other time periods or by individuals not authorized by Florida Housing is expressly prohibited. Access is subject to Florida Housing business control and information protection policies, standards and guidelines as may be modified from time to time. Use of any other of Florida Housing's Information Systems is expressly prohibited. This prohibition applies even when an Information System that



Contractor is authorized to access serves as a gateway to other Information Systems outside Contractor's scope of authorization. Contractor agrees to access Information Systems only from specific locations approved for access by Florida Housing. For access outside of Florida Housing's premises, Florida Housing may designate the specific network connections to be used to access Information Systems.

D. Information Security. Contractor shall be responsible for establishing and maintaining an information security program (the "Information Security Program") designed to satisfy all objectives set forth in the Act and Florida Law. The Contractor shall take full responsibility for the security of all Confidential Information in its possession or in the possession of its approved subcontractors and shall hold Florida Housing harmless for any damages or liabilities resulting from the unauthorized disclosure, processing, or loss thereof. At a minimum, Contractor agrees:

a. To implement appropriate technical and organizational measures, including a network firewall and maintaining secure environments that are patched and up-to-date with all appropriate security updates as designated by a relevant authority, to protect Confidential Information against (i) accidental or unlawful destruction or loss, (ii) unauthorized disclosure, access, processing and exfiltration, or theft, in particular where processing involves the transmission of Confidential Information over a network, (iii) alteration, and (iv) all misuse;

b. To implement appropriate procedures to ensure that (i) unauthorized persons will not have access to the data processing equipment used to process the Confidential Information, (ii) any persons it authorizes to have access to the Confidential Information will respect and maintain the confidentiality and security of the Confidential Information, and (iii) the measures and procedures that it uses will be sufficient to comply with all legal requirements applicable to both Florida Housing and Contractor;

c. To provide for the security of such PII, in a form acceptable to Florida Housing, without limitation, non-disclosure, use of appropriate technology, security practices, computer access security, data access security, data storage encryption, data transmission encryption, security inspections and audits;

d. To ensure the transmission or exchange of Confidential Information with Florida Housing and/or any other parties shall take place via secure Advanced Encryption Standards (AES), e.g., HTTPS, FTPS, SFTP or equivalent means. All data stored as a part of backup and recovery processes shall be encrypted, using AES;

e. To appropriately destroy Confidential Information based on the format stored upon the expiration of any applicable retention schedules; and

f. To discipline employees that violate the Information Security Program.

E. Information Security Program Monitoring. Upon written request of Florida Housing, Contractor shall provide Florida Housing with viewing access of summaries of all internal and third-party security audits and security test results from the past three years to confirm that Contractor is satisfying its obligations under this Contract, the Act, and Florida Law. Further, during the term of this Contract, the following monitoring is required at Contractor's expense:

a. Contractor will provide Florida Housing annual written assurances that Contractor's Information Security Program continues to meet the requirements of this Contract.

b. Contractor will provide Florida Housing, on an annual basis, viewing access to copies of all audits of Contractor's internal controls to protect Confidential Information, Contractor's security program, Contractor's reviews to protect Confidential Information, and Contractor's business continuity program. Such audits may be performed by Contractor or Contractor's independent external auditors.

c. Each report prepared in connection with the audits required in this Section shall contain Contractor's management response to any noted exceptions, together with appropriate target dates for completion of required or planned changes. In the event Florida Housing's review of any of the above audits raises issues concerning Contractor's continued compliance with this Contract or the requirements set forth in the Act and/or Florida Law, Florida Housing shall give written notice to Contractor of such issues. Within 30 days from the date of Florida Housing's initial written notification to Contractor, the parties shall agree upon a date by which the issues will be resolved. The parties will use their best efforts to resolve the issues, correct any problem, or make appropriate changes to the Contract that do not materially alter the original obligations of the parties. In the event such issues are not resolved before the agreed upon date, the Contract, at Florida Housing's sole option, may be terminated, and any advance payments of fees under the Contract will be prorated as of the termination date and promptly returned by Contractor to Florida Housing. No termination penalty shall be paid by either party.

F. Unauthorized Disclosure. Contractor shall (a) immediately notify Florida Housing of any actual or suspected unauthorized access to, processing, use, or disclosure of the Confidential Information not authorized by the terms of this Contract, (b) estimate the disclosure's effect on consumers, Florida Housing, and the confidentiality, integrity, and availability of the Confidential Information, including the date(s) and number of records affected by unauthorized access or processing of Confidential Information, (c) comply with Florida Housing's requests for assistance in responding to such incident, (d) specify all timelines and corrective actions taken or planned to be taken by Contractor to address this incident and prevent future similar incidents, and (e) otherwise abide by provisions set forth in section 501.171, Fla. Stat.. The parties mutually agree to initiate immediate changes in security procedures and requirements in the event of such unauthorized access. Upon the occurrence of any actual or suspected unauthorized access to or use or disclosure of the Confidential

Information described in clause (a) above which reasonably may be anticipated to have a material adverse effect on Florida Housing's reputation or business, Florida Housing, at its sole option, may immediately terminate the Contract upon notice to Contractor, and any advance payment of fees under the Contract will be prorated as of the termination date and promptly returned by Contractor to Florida Housing. No termination penalty shall be paid by either party.

G. Access to Premises. For the sole purpose of reviewing Contractor's security policies and procedures, Contractor shall grant Florida Housing access to Contractor's premises from time to time during regular business hours upon reasonable notice to Contractor from Florida Housing. Florida Housing shall hold in confidence and shall promptly return or destroy all information contained in or derived from Contractor's policies and procedures and shall not use any such information except for the sole purpose of ensuring Contractor's compliance with the terms of this Contract.

H. Regulatory Oversight. Contractor acknowledges that Florida Housing is regulated by certain regulatory authorities (the "Regulators"), that the Regulators have examination oversight over Florida Housing, and that the Regulators have authority to examine the operations performed by Contractor on behalf of Florida Housing. Contractor will cooperate fully with Florida Housing in responding to inquiries made to Florida Housing by Regulators. In the event a Regulator determines corrective measures are required to meet the requirements of the Act and/or Florida Law, Contractor and Florida Housing will use their best efforts to modify the Contract to comply with such Regulator's requirements. In the event a Regulator formally objects to the relationship between Contractor and Florida Housing and such objection cannot be remedied, the Contract shall be deemed terminated and (i) the parties will mutually agree to an orderly conversion of the Services to another provider of similar services; (ii) all payments made in advance under the Contract shall be prorated as of the termination date and promptly returned by Contractor to Florida Housing; and (iii) no termination penalty shall be paid by either party.

I. Business Resumption and Contingency Plans. Contractor shall maintain in place a complete disaster recovery and business resumption plan sufficient to satisfy all standards and requirements set forth in the Act and Florida Law. Throughout the term of the Contract, Contractor will maintain recovery services that are substantially equivalent to or better than those that are in effect as of the Effective Date of this Contract. Contractor will provide to Florida Housing copies of its disaster recovery and business resumption plan and any test results pertaining thereto upon request by Florida Housing.

J. Insurance. Contractor shall provide Florida Housing with insurance information for stand-alone cyber liability coverage, including the limits available and retention levels. If Contractor does not carry stand-alone cyber liability coverage, Contractor agrees to indemnify costs related to notification, legal fees, judgments, settlements, forensic experts, public relations efforts, and loss of any business income related to this Commitment.

#### **N. OTHER PROVISIONS**

1. This Contract shall be construed under the laws of the State of Florida, and venue for any actions arising out of this Contract shall lie in Leon County.
2. No waiver by Florida Housing of any right or remedy granted hereunder or failure to insist on strict performance by the Contractor shall affect or extend or act as a waiver of any other right or remedy of Florida Housing hereunder, or affect the subsequent exercise of the same right or remedy by Florida Housing for any further or subsequent default by the Contractor. A waiver or release with reference to any one event shall not be construed as continuing or as constituting a course of dealing.
3. Any power of approval or disapproval granted to Florida Housing under the terms of this Contract shall survive the terms and life of this Contract as a whole.
4. The Contract may be executed in any number of counterparts, any one of which may be taken as an original.
5. The Contractor understands and agrees to provide Florida Housing with an IRS Form W-9 upon request.
6. The Contractor understands and agrees to cooperate with any audits conducted in accordance with the provisions set forth in Section 20.055(5), Fla. Stat.
7. The Contractor understands and agrees to comply with the provisions of Section 448.095, Fla. Stat.
8. The Contractor attests, under penalty of perjury, that it does not meet any of the criteria in Section 287.138(2)(a) – (c), Fla. Stat.
9. The Contractor attests, under penalty of perjury, that it does not use coercion for labor or services as defined in Section 787.06, Fla. Stat.

#### **O. LOBBYING PROHIBITION**

No funds, compensation or other resources received in connection with this Contract may be used directly or indirectly to influence legislation or any other official action by the Florida or Federal Legislature or any state or Federal agency. The Contractor further acknowledges that it has not retained the services of any lobbyist or consultant to assist in the procurement and negotiation of this Contract.

#### **P. LEGAL AUTHORIZATION**

The Contractor certifies with respect to this Contract that it possesses the legal authority to enter into this Contract and that, if applicable, its governing body has authorized, by resolution or otherwise, the execution and acceptance of this Contract with all covenants and assurances contained herein. The Contractor also certifies that the undersigned

possesses the authority to legally execute and bind the Contractor to the terms of this Contract.

**Q. PUBLIC ENTITY CRIME**

Pursuant to Section 287.133(2)(a), Fla. Stat.: “A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in s. 287.017 for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.”

Any contract in violation of this provision shall be null and void.

**R. CONFLICTS OF INTEREST**

1. Section 420.503(34), Fla. Stat., states:

“Prohibited business solicitation communication” means a private written or verbal communication between a member, officer, or covered employee of the corporation and a service provider regarding the merits of the service provider and whether the corporation should retain the services of the service provider. The term does not include:

- (a) A verbal communication made on the record during a public meeting;
- (b) A written communication provided to each member and officer of the corporation and made part of the record at a public meeting;
- (c) A written proposal or statement of qualifications submitted to the corporation in response to a corporation advertisement seeking proposals or statements of qualifications as part of a competitive selection process.
- (d) A verbal or written communication related to the contractual responsibilities of a service provider who was selected to provide services or who was included in a pool of service providers eligible to provide services as a result of a competitive selection process, so long as the communication does not relate to solicitation of business.
- (e) A verbal or written communication related to a proposed method of financing or proposed projects, so long as the communication does not relate to solicitation of business.

2. By executing this contract, the Contractor certifies that it shall comply with, and is currently in compliance with, Section 420.512(5), Fla. Stat., as amended.

3. In addition to the conflict of interest rules imposed by the Florida Statutes, should the Contractor become aware of any actual, apparent, or potential conflict of interest or should any such actual, apparent, or potential conflict of interest come into being subsequent to the effective date of this Contract and prior to the conclusion of the Contract, the Contractor will provide an e-mail notification to Florida Housing's Contract Administrator within 10 working days. If Florida Housing, in its sole discretion, finds the Contractor to be in non-compliance with this provision, without prior written consent from Florida Housing's Executive Director, any compensation received in connection with this Contract shall be subject to forfeiture to Florida Housing and all obligations on the part of Florida Housing to continue doing business with the Contractor or assign any future transaction to the Contractor shall, if Florida Housing so elects, terminate.

#### **S. ELECTRONIC SIGNATURES**

The parties agree that this Contract (and any attachments, exhibits, and amendments) may be executed and delivered by electronic signatures and that the signatures appearing on this Contract are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility. Each executed counterpart shall be deemed an original, and all such counterparts shall constitute one and the same document. As used herein, the term "electronic signatures" shall have the meaning in Section 668.50, Fla. Stat.

#### **T. ENTIRE AGREEMENT**

This Contract, including any and all attachments, embodies the entire agreement of the parties. There are no other provisions, terms, conditions, or obligations between the parties. This Contract supersedes all previous oral or written communications, representations, or agreements on this subject not incorporated herein.

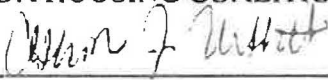
#### **U. SEVERABILITY**

If any provision of this Contract is in conflict with any applicable statute or rule, or is otherwise unenforceable, then such provision shall be deemed null and void to the extent of such conflict or unenforceability, and shall be deemed severable, but shall not invalidate any other provision of this Contract.

**REMAINDER OF PAGE INTENTIONALLY LEFT BLANK**

IN WITNESS WHEREOF, the parties have executed this Contract Number 018-2025, each through a duly authorized representative, effective on the Effective Date.

FLORIDA HOUSING COALITION, INC.


By: 

Name: Ashon J. Nesbitt

Title: Chief Executive Officer

Date: June 30, 2025

FLORIDA HOUSING FINANCE CORPORATION

By: 

Name: Angeliki G. Sellers

Title: CFO

Date: 06/30/25



## **EXHIBIT A SCOPE OF WORK**

**All items listed in this section are subject to funding availability for the Catalyst program.**

### **A. Objectives**

The work being procured shall include, but is not limited to, the following two general components: a training component and a technical support and assistance component. These are described individually below. Florida Housing reserves the right to monitor all Catalyst trainings and technical assistance activities.

#### **1. Training Component**

The training component will be designed to build the housing development capacity of state and local governments, public housing authorities, not-for-profits, and community-based organizations, as a permanent resource for the benefit of communities in this state related to affordable housing. The training shall be delivered in workshops (local and regional) lasting for at least six hours and webinars lasting 1-2 hours. The scope and materials of the training shall include, but is not limited to:

- i. Real estate development skills related to affordable housing and supportive housing including the construction process and property management and disposition;
- ii. Development of public-private partnerships to reduce housing costs;
- iii. Management and board responsibilities of community-based organizations;
- iv. Administration of state and federal affordable housing programs and initiatives; and
- v. Guidance in achieving project completion.

#### **2. Technical Support and Assistance Component**

The Contractor shall provide specialized technical assistance and support to local governments, not-for-profits and other qualified organizations to implement the Hurricane Housing Recovery Program (HHRP), HOME Investment Partnership Program (HOME), State Apartment Incentive Loan Program (SAIL), State Housing Initiatives Partnership (SHIP) Program, and other affordable housing programs and initiatives as provided in section 420.531, Fla. Stat. The Contractor's technical assistance staff shall have the capacity to respond to technical assistance needs as they arise during the contract year, and as identified by the Contractor or Florida Housing. Such technical support and assistance shall include, but is not limited to:

- i. The formation of local and regional housing partnerships as a means of bringing together resources to provide affordable housing;

- ii. The implementation of regulatory reforms to reduce the risk and cost of developing affordable housing;
- iii. The implementation of affordable housing goals and strategies included in local government comprehensive plans;
- iv. Compliance with requirements of state and federally funded housing programs; and
- v. Implementation of reporting systems to monitor compliance and program accomplishments.

## **B. Scope of Services**

The Contractor shall perform and render the services identified below as an independent contractor and not as an agent, representative, or employee of Florida Housing. These services shall be known as “Contractor and professional services” and shall include, but are not limited to, the provision of advice and assistance to Florida Housing in the following areas:

### **1. Technical Assistance Delivery**

The Contractor shall deliver technical assistance to housing professionals, staff of city, county and state governments, public housing authorities, not-for-profit and community-based organizations and others who participate in the development of affordable housing. Delivery of technical assistance shall be in the form of workshops, telephone and e-mail technical assistance, on-site technical assistance, and webinars meeting the following criteria:

#### **a. Local Workshops**

- i. Upon consultation and approval from Florida Housing, the Contractor shall conduct local workshops that have been requested by one or more local governments, not-for-profits, or community-based organizations. Such organizations must be involved with a local or regional affordable housing delivery process in coordination with agencies providing local government funds.
- ii. Local workshops shall be customized to meet the individual needs of participants from a geographically proximate region and shall be typically limited to 25 participants. Where possible, appropriate, and relevant, the Contractor shall extend an invitation to other regional interests to participate in the local workshops.
- iii. Local workshops shall be held on weekdays (i.e., Monday through Friday).
- iv. The training shall consist of lectures, discussions, handouts, and other relevant information covering the local workshop topic.

v. The Contractor shall consult with and obtain prior approval from Florida Housing in determining final workshop content, training schedule, training duration and workshop locations.

vi. The Contractor shall be responsible for scheduling all workshop meeting rooms and speakers, and any payment associated therewith.

vii. The Contractor shall be responsible for the registration of all local workshop participants.

#### **b. Regional Workshops**

i. Upon consultation and approval from Florida Housing, the Contractor shall be available to conduct regional workshops that have been requested by one or more local governments, not-for-profits, or community-based organizations.

ii. Regional workshops shall be customized to meet the individual needs of attendees from a geographically proximate region and shall typically have 30 or more participants. Where possible, appropriate, and relevant, the Contractor shall extend an invitation to other regional interests to participate in the regional workshops.

iii. The Contractor shall be responsible for the same tasks for regional workshops as are set forth in Section B.1.a. above for local workshops.

#### **c. Stakeholder Group Events**

i. Upon consultation and approval from Florida Housing, the Contractor shall be available to conduct stakeholder group events that have been requested by a local government, not-for-profit, or community-based organization. Stakeholder group events may include gatherings such as housing forums, training summits, conferences, community capacity building events, or training opportunities.

ii. Stakeholder events shall be prepared according to the request of those seeking the training. Where possible, appropriate, and relevant, the Contractor shall extend an invitation to other regional interests to participate in the event.

iii. The training shall consist of lectures, discussions, handouts, and other relevant information covering the training topic.

iv. The Contractor shall consult with and obtain prior approval from Florida Housing in determining final training content and schedule.

v. Stakeholder event requests for training that occur during an established conference or training at which attendees are required to pay an attendance fee are not eligible for additional compensation under this contract and shall not be approved.

**d. Telephone and E-mail Technical Assistance**

i. The Contractor shall provide telephone and e-mail technical assistance through the installation and operation of a Florida toll-free telephone line to be used solely for the purpose of providing technical assistance under the Affordable Housing Catalyst Program.

ii. Telephone calls shall be answered within 24 hours by a knowledgeable member of the Contractor's technical assistance team. The telephone line will be staffed during the business day from 9:00 am to 5:00 pm, Eastern Time, Monday through Friday, excluding the Contractor's observed holidays and annual conference, or on an adjusted schedule agreed to by Florida Housing due to budget limitations.

iii. All costs associated with the installation, staffing and maintenance of the toll-free line shall be paid for by the Contractor.

iv. The Contractor shall establish an e-mail address(es) to receive incoming messages. E-mail inquiries must be responded to within one business day or on an adjusted schedule agreed to by Florida Housing due to budget limitations.

**e. On-site Technical Assistance**

i. The Contractor shall be available to provide on-site technical assistance to local governments, not-for-profits, community-based organizations or other entities that receive HHRP, SHIP, HOME, or other affordable housing program funds.

ii. Upon receipt of a request for on-site technical assistance, the Contractor shall submit a written request to Florida Housing for approval. The request shall identify who will be receiving technical assistance, the reason a technical assistance visit is needed, any problem areas, estimated length of time needed for the on-site visit, and any previously conducted site visits.

iii. Technical assistance on-site visits shall last up to six hours, depending upon the needs and desires of the technical assistance client. In instances where six hours is inadequate to address an organization's needs, the contractor shall propose a longer time frame for assistance. In instances where more than 12 hours of assistance is anticipated, the Contractor shall develop and submit a technical plan for assistance (TPA) for the organization. The TPA shall be submitted in addition to the on-site technical assistance request form described in sub-item i., above. This plan will address the subject areas in which the organization needs assistance and will outline the actions that will be taken to improve the organization's performance in those areas.

iv. After each on-site technical assistance visit, the Contractor shall submit a written report to Florida Housing in an acceptable format.

v. All costs associated with the on-site visit must be paid for by the Contractor including salaries, materials, preparation and research time to deliver the technical assistance to the customer and all travel related expenditures.

**f. Webinars**

i. The Contractor will conduct webinars specifically designed for housing professionals, local governments, housing stakeholders, state agencies, not-for-profits public housing authorities, and community-based organizations that participate in the development of affordable housing. Instructors for webinars must be knowledgeable in the subject matter and have experience in the development of affordable housing.

ii. Webinar topics, dates shall be established by Florida Housing and the Contractor at least 10 days prior to the webinar date.

iii. The Contractor must consult with and obtain prior approval from Florida Housing in determining final webinar content, training schedule, and training duration. Webinars that contain subject matter related to Florida Housing programs or related issues are subject to review by Florida Housing subject matter experts.

iv. The Contractor will be responsible for the registration of all webinar participants.

**g. Off-site Technical Assistance**

i. The Contractor will be available to provide off-site technical assistance to local governments, not-for-profits, community-based organizations, or other entities that administer HHRP, SHIP, HOME or other affordable housing programs.

ii. Upon receipt of a request for off-site technical assistance, the Contractor will submit a written request to Florida Housing for approval. The request shall identify who will be receiving technical assistance, the reason technical assistance is needed, any problem areas, estimated length of time needed, and any previously conducted site visits. Off-site technical assistance provided as a follow-up to participants of an approved workshop, stakeholder event, or site visit are considered pre-approved and will be reported as part of the monthly report.

iii. Off-site technical assistance shall be documented as part of the monthly report from the Contractor.

**2. Instructional Materials**

The Contractor must furnish all instructional materials for all workshops, and webinars at its own expense. This shall include, but not be limited to: course outlines; transparencies/charts/graphs used for classroom instruction; manuals and/or resource materials approved by Florida Housing; any transportation associated with workshop site

tours for the instructors and workshop participants; audio/visual equipment or other equipment necessary to present materials for instructional training and workshop delivery; and any computers/software needed for workshop participants.

### **3. Workshop Speakers**

The Contractor shall ensure that all workshop and webinar presenters possess the knowledge, skills and expertise in the designated topic area. Upon request from Florida Housing, the Contractor will provide in writing the qualifications of any presenters or arrange for a meeting between any new staff members working under this contract and appropriate Florida Housing staff at no cost to Florida Housing.

### **4. Catalyst Marketing - Materials and Activities**

a. The Contractor shall market all workshop and webinars statewide. Marketing shall be done through the Contractor's website, newsletters, emails and social media. Marketing of all workshops and webinars shall be made available to all stakeholders; however, specific effort to market to individual or groups that would directly benefit from the workshop or webinar shall be a priority.

Marketing materials must meet the following criteria:

i. The Florida Housing logo, sponsorship information, training session content, dates, times and locations must be prominently displayed on all written marketing materials.

ii. Marketing materials for workshops and webinars will be distributed at least 30 days prior to the event, unless otherwise approved by Florida Housing. Materials shall be distributed to local governments, not-for-profit corporations which produce or desire to produce affordable housing, public housing authorities, and other interested parties. The information shall also be posted prominently on a website maintained by the Contractor which will be linked to the Florida Housing website.

b. Two weeks prior to each regional or local workshop, the Contractor will mail or e-mail information to each registered participant to include: registration confirmation, workshop location, map directions, designated parking areas, lodging information, and an agenda which includes the names of the speakers and the topics to be addressed.

c. The Contractor shall also market workshop, webinar or stakeholder group event information via social media and through the newsletters of related organizations, such as Florida Community Development Association, Florida League of Cities, Florida Association of Counties, Florida Homebuilders Association, Florida American Planning Association, Regional Planning Councils, Florida Association of Housing and Redevelopment Officials, Florida Association of Homes and Services for the Aging, and other appropriate organizations, but shall not be required to purchase paid advertising in these newsletters.

d. At least 60 days prior to the expiration date of this Contract, the Contractor must provide draft copies of written materials that discuss the Catalyst Program for review and comment by Florida Housing prior to printing and distribution in any brochure, newsletter or publication produced for the purpose of this contract. This material must state that the services the Contractor performs for the Affordable Housing Catalyst Program are made possible through the Florida Housing Finance Corporation.

e. The Contractor will maintain a web site containing the following information:

- i. Technical assistance listing of workshops by date and location;
- ii. Contact information for purposes of registration;
- iii. Course descriptions and agendas; and
- iv. Current and archived Training manuals, PowerPoint presentations, webinars and videos contracted under and paid for through this Contract.

#### **5. Technical Assistance Log**

The Contractor must maintain a monthly technical assistance log in a format acceptable to Florida Housing. This log will contain data on the number of on-site technical assistance visits conducted, number of telephone calls received on the toll-free telephone line, number of workshops conducted, and the total number of clients served.

#### **6. Program Reports**

As part of each monthly report, the Contractor will provide an invoice of charges for the month and a tracking record of expenditures for the contract year in a format acceptable to and approved by Florida Housing.

Annually, the Contractor will provide a summary of total of all deliverables to include workshops, stakeholder events, webinars, on-site visits, phone calls and emails received and responded to and number of hours of technical assistance provided. This report will include the number of individuals/organizations assisted throughout the year.

#### **7. Meetings and Conferences**

Notwithstanding the language in Item B. above, the Contractor shall be available upon reasonable notice to attend and conduct meetings on behalf of Florida Housing, as directed in writing by Florida Housing, to further the development of affordable housing. Meetings conducted or attended on behalf of Florida Housing may be billed as a technical assistance on-site visit.



## **8. Evaluations**

### **a. Workshops and Webinars**

For each event, the Contractor shall distribute an evaluation form, acceptable to Florida Housing, to all those participating in the workshop or webinar. The Contractor will submit the completed evaluation forms to Florida Housing with the monthly report.

### **b. On-site Technical Assistance**

For each on-site technical assistance visit, the Contractor will distribute an on-site evaluation form, acceptable to Florida Housing, to the client receiving the on-site technical assistance. The Contractor shall instruct the client to complete the form, and then mail or e-mail the evaluation to Florida Housing.

**REMAINDER OF PAGE INTENTIONALLY LEFT BLANK**

## **EXHIBIT B DELIVERABLES**

The following is a detailed list with descriptions of deliverables. Florida Housing may add new topics or require multiple topics to be condensed into one event if needed. All deliverables will be approved by Florida Housing prior to scheduling. **All items listed in this section are subject to funding availability.**

### **A. State Housing Strategy Working Group**

The Contractor will facilitate a statewide working group and provide technical assistance. The working group is an intensive type of technical assistance and an interactive opportunity for peer sharing. The group will be comprised of local government staff and community stakeholders identified by the Contractor and approved by Florida Housing. Each local government in the working group will develop an action plan.

The working group will focus on Public Land Disposition. Designed for local governments seeking to unlock the potential of publicly owned land, the group will focus on identifying viable parcels and structuring effective disposition strategies. The group will also consider the benefits of special zoning areas like inclusionary zoning, as addressed in the 2023 OPPAGA Report “Affordable Housing Strategies in Other States”. TA providers will offer new research to inform RFPs, standards, selection criteria, and other related documents that local governments develop.

**Meetings:** The Contractor will meet virtually with the working group every two to three weeks and will solicit interest from both SHIP staff and relevant stakeholders. After selecting participants, the working group will commence with virtual 1-1.5-hour meetings. The Contractor will facilitate the meetings, focusing on peer sharing, instruction on similar programs, and breakout sessions focused on drafting a proposed policy or procedure regarding publicly owned land and an action plan for approval, and will meet separately with each community between group meetings to provide technical assistance on the development of participants’ draft policy or procedure. Florida Housing will receive regular progress reports on each community’s work.

#### **Billing Schedule for the Working Groups**

\$4,400	December:	Develop a schedule for the working group. Start promotional activities.
\$4,400	January:	Review applications and select working group participants. Organize the working group schedule.
\$4,400	February:	1 <sup>st</sup> working group meeting and one-on-assistance meetings.
\$4,400	March:	Group meetings and one-on-one assistance.
\$4,400	April:	Group meetings and one-on-one assistance.
\$4,400	May:	Group meetings and one-on-one assistance. Finalize policy/procedure and action plans.

**Action Plans and Outcomes:** The Contractor will document progress with a summary of action items in monthly reports which will identify the people, resources, funding, strategies,

and actions identified to move the program forward. At least three participating communities will develop a proposed policy or procedure to identify viable parcels and structure effective disposition strategies including an action plan for approval and implementation. These plans may also include the establishment of special zoning areas.

## **B. Regional Roundtables**

Regional roundtables are in-person gatherings for SHIP staff in six regions of the state, that bring SHIP communities together with their counterparts from neighboring cities and counties. The Contractor's staff will prepare for each event by surveying staff in a region to identify topics of most interest. They will secure a meeting venue for an in-person 4-hour roundtable event and customize each event by spotlighting SHIP program administrative best practices and successful strategies in each region. Roundtables will provide an opportunity for neighboring communities to exchange insights on addressing housing challenges and learn from each other's experiences.

## **C. Affordable Housing Advisory Committee (AHAC) Support Initiative**

All SHIP staff and AHAC members can benefit from the AHAC Support Initiative. Through the AHAC Support Initiative, the Contractor will offer in-depth assistance to several (4-6) advisory committees and then broadly share outcomes through two AHAC webinars and an appendix to the AHAC Guide. The Contractor will select four or more AHACs to receive in-depth support, training, and technical assistance as they create their annual AHAC report. Services will include:

- In-depth analysis of the jurisdiction's land development regulations, housing program documents, and current incentive strategies;
- Audits of prior year AHAC reports;
- An initial meeting in each jurisdiction with the SHIP administrator who organizes the AHAC related to the timing, scheduling, and content of AHAC meetings;
- An initial meeting with AHAC members in each jurisdiction providing an overview of AHAC responsibilities and the timeline of required activities.
- Written recommendations on what the Contractor advises that the AHAC include in its annual report to their City or County Commission; and
- A final meeting with AHAC members in each jurisdiction to address questions, comments, and ideas. The Contractor's staff will present the written recommendations.

The AHAC Support Initiative will benefit an audience far beyond the four AHACs receiving in-depth assistance. SHIP staff across Florida will benefit from a written 25/26 appendix that the Contractor will add to the AHAC Guide and broadly promote, that will also involve marketing for the two-part AHAC webinar series, which includes content and examples from this in-depth assistance.

### **Billing Schedule for the AHAC Support Initiative**

<b>\$8,000</b>	Complete for each of four or more AHACs
	1) Audits of prior year AHAC reports;
	2) an initial meeting in each jurisdiction's SHIP administrator; and
	3) an initial meeting with AHAC members.

- \$8,000 Provide for each of four or more AHACs:
  - 1) in-depth analysis of the jurisdiction's land development regulations, housing program documents, and current incentive strategies;
  - 2) written recommendations; and
  - 3) a final meeting with AHAC members.
- \$4,000 Complete a FHFC-approved appendix to the publication "Affordable Housing Incentive Strategies, A Guidebook for AHAC Members"

#### **D. Regional In-Person Workshops**

1. Proficiency in Income Qualification: This is an intensive income compliance workshop designed for those who process SHIP applications and those who oversee the SHIP office. One of the training courses that is most requested by SHIP staff, this course introduces numerous critical eligibility activities, including income verification, determining household size, and calculation of annual income. The training covers how the Housing Opportunity Through Modernization Act (HOTMA) has updated these income qualification rules. Hands-on exercises will challenge participants to apply qualification methods to case studies and to reflect on how lessons learned may be applied to each participant's daily SHIP work.

2. SHIP Program Administration for New Staff: This workshop will provide guidance on the fundamental rules of the SHIP program, as well as assist SHIP administrators with five years or less of SHIP experience with the implementation of their programs. The training will provide a SHIP program overview, income eligibility calculations, LHAP guidance, and AHAC requirements. Additionally, the training will review a year-long timeline of SHIP tasks and deadlines and will provide LHAP guidance about strategy implementation. Participants will learn about tracking and reporting SHIP, financial management, monitoring, and compliance.

3. SHIP Program Administration for Experienced Staff: This advanced workshop is designed for SHIP administrators with five or more years of experience who are seeking to deepen their understanding of SHIP implementation, enhance program efficiency, and address complex compliance challenges. The session will focus on advanced topics such as refining LHAP strategies to meet evolving community needs, tackling common audit findings, and applying best practices in financial management, monitoring, and reporting. Participants will engage in peer-to-peer discussions to share successful strategies, troubleshoot recurring issues, and explore innovations in SHIP administration. The workshop will also include a review of regulatory updates, in-depth compliance considerations, and practical tools to streamline tracking and reporting.

4. Successful Purchase Assistance Program Management: SHIP funds must be expended for homeownership activities, and homebuyer assistance is one of the most common strategies employed by local governments to meet the homeownership set aside requirement. This workshop is for SHIP local government housing staff and their community partners interested in developing, implementing, and managing a successful purchase assistance strategy. It will detail the application process and pre-purchase requirements, including homebuyer education requirements and inspections. Local governments can also explore

opportunities for the development of single-family homes while working with developers and sponsors.

5. Introduction to Affordable Housing Development: This workshop provides guidance to nonprofit organizations on predevelopment activities and due diligence necessary prior to the development of affordable housing units. Participants will learn about the Predevelopment Loan Program (PLP) application process, the PLP Rule in the Florida Administrative Code, creation of the Development Plan, and technical assistance for nonprofit borrowers to get from concept to construction. Presenters will concept and design, nonprofit mission, site selection, creating the project concept, assessing organizational capacity, assembling the development team, construction/design, zoning and land uses, budgeting, and the timeframe of the predevelopment process.

6. The Affordable Housing Development Process: This advanced workshop is designed for nonprofit developers, housing program administrators, and community partners engaged in affordable housing development. Presenters will guide participants through every phase of the development process from site selection, zoning, permitting financing, credit underwriting, construction, and lease-up. Additional topics will include addressing land use challenges, managing impact fees, and structuring housing to ensure long-term affordability. Participants will leave with the knowledge needed to move housing projects from concept to completion.

#### **E. Workshops for Rural Communities**

The Contractor will host three regional workshops to facilitate deeper engagement among rural SHIP administrators. These in-person events will encourage participants to consider how to best use possible increased future housing funding.

1. Housing Support for Rural Communities Region 1- This workshop will provide a space for peer exchange on scaling housing assistance strategies. The Contractor will offer presentations on budgeting, staffing, and outreach, then break off into small groups by county, where each group will plan for a growing budget. Region 1 communities include: Calhoun, Franklin, Gadsden, Gulf, Hamilton, Holmes, Jackson, Jefferson, Liberty, Wakulla, Walton, and Washington Counties.

2. Housing Support for Rural Communities Region 2- This workshop will take the same approach as the training for Region 1. Region 2 communities include: Baker, Bradford, Columbia, Dixie, Gilchrist, Lafayette, Madison, Nassau, Putnam, Suwannee, Taylor, and Union Counties.

3. Housing Support for Rural Communities Region 3- This workshop will take the same approach as the training for Regions 1 and 2. Region 3 communities include: De Soto, Levy, Glades, Hardee, Hendry, Highlands, Monroe, and Okeechobee Counties.

## **E. New Webinars for the Catalyst Program:**

1. Expediting Rehabilitation and Demolition/Home Replacement: This session explores practical strategies to accelerate the delivery of essential housing repairs, as well as demolition and home replacement projects. Participants will learn how to streamline procurement, inspections, and project management to reduce delays and administrative burdens. The training will also highlight how demolition/reconstruction can be an effective strategy to better serve households in need of safe, stable housing.

2. Tune Up Your Homebuyer Program: The training will challenge SHIP staff to reexamine their purchase assistance program, as several communities have had a static strategy for many years. Presenters will address best practices for helping home buyers, discussing the application process, pre-purchase requirements, homebuyer education, inspections, and more. Participants will learn whether their program passes the 8-point market responsiveness check-up checklist and how to build flexibility in their policies to quickly respond to shifting market conditions.

3. Designing Effective Land Use Incentives (Second Part of AHAC Series): This webinar will build on the more general overview from the first (pre-exisitng) webinar to provide detailed technical information on evaluating effective structures of incentives, including density bonuses and how to coordinate other regulatory incentives, to successfully encourage use of these incentives and produce affordable units. The Contractor will conduct research of recently submitted reports to summarize trends and provide example incentive structures from across the state.

4. Overcoming NIMBY Opposition: Telling the Story of Housing: Not In My Backyard Syndrome (NIMBYism) connotes objections to new housing development made for reasons such as fear and prejudice. Even with the extreme need for more affordable housing, NIMBYism is still all-too common in parts of our state. This webinar will explore ways the affordable housing ecosystem can dispel NIMBY opposition to affordable housing through tactics to support affordable housing as fundamentally vital community infrastructure. Affordable housing isn't just a program; it's a story that needs to be told with clarity, strategy, and heart. Participants will learn how to transform messaging around SHIP, LHAP, and local housing efforts into narratives that build trust, drive action, and change the way communities see housing. Presenters will share tips for highlighting success and will also spotlight how local governments have shared their success stories. This webinar will also feature affordable housing practitioners who have experienced and overcome NIMBYism. This webinar is designed for developers, local elected officials, city and county managers, and city and county attorneys.

5. Expanding Manufactured Housing Solutions: This webinar will take a deeper dive on topics covered in a more cursory way during the 'Using SHIP for Manufactured Housing' webinar, including more analysis of zoning allowances for this type of housing and details on



zoning reforms to facilitate this type of housing. The Contractor will also feature another local government successfully facilitating manufactured housing.

6. Funding Projects through Tax-Exempt Bonds: This session demystifies how 4 percent tax credits and tax-exempt bonds can be used to finance affordable rental housing. Participants will learn how to layer Florida Housing funding sources and structure their capital stack effectively.

7. Joint Ventures: This training will focus on nonprofit developers partnering with for-profit developers. The presenters will address what benefits partners bring, including some that bring the experience required for Florida Housing applications. Participants will learn about options for partnership with either a nonprofit or for-profit entity with development experience and will benefit from ideas for locating a partner and methods for checking references. Training materials and exercises will help participants assess their organization's needs for a development partner, learn how to evaluate a potential development partner, and plan how to structure a Developer Agreement. Nonprofit developers will discuss risks, how to assign the work, and ways to divide the fee.

8. New Construction Strategies and Partnerships: This webinar is designed to guide SHIP administrators as they explore opportunities for local governments to develop single family homes while working with developers and sponsors. Participants will find that designing a strategy in their Local Housing Assistance Plan that meets the SHIP requirements is an important first step in this process. They will also learn how to solicit sponsors and developers, structure their program, develop effective agreements, and outline responsibilities to comply with SHIP program requirements. The presenters will examine sample construction strategies to highlight options for the terms of assistance and for selecting eligible buyers. SHIP administrators, nonprofit housing developers and contractors will find this webinar an essential first step in establishing or updating a single-family development program.

9. Building Capacity with the Predevelopment Loan Program: Participants will explore how Florida Housing's Predevelopment Loan Program can help their organization fund planning activities and build long-term capacity for development.

10. "Yes, in God's Backyard", A New Tool for Affordable Housing: The 2025 Florida Legislature passed Senate Bill 1730 which allows local governments approve affordable housing on certain land owned by religious institutions regardless of the underlying zoning. This "Yes-in-God's-Backyard" (YIGBY) policy was added to the existing "House Bill (HB)1339" tool for affordable housing that has been around since 2020. Presenters from faith-based organizations and developer partners will offer guidance on the development process and project feasibility. Participants will learn the basics of the existing HB 1339 tool and how local governments can use this discretionary tool to support the development of affordable homes on land owned by faith-based organizations.



11. Supporting Shared Equity & CLTs with SHIP: Due to the landscape of some housing markets in Florida, supporting the stock of permanently affordable homes is a potential strategy. The flexibility of the SHIP program may be a resource to be leveraged to support the capacity development of community land trusts (CLTs). Presenters will discuss the model of LHAP strategies that can support CLTs and other organizations seeking to create permanently affordable housing opportunities. Additionally, implementation through the provision of legal instruments, procurement and assignment of compliance and monitoring responsibilities will be detailed.

12. Rural Housing Policy: This training offers an overview of rural housing policies beyond SHIP-related initiatives. Presenters will review all the rural housing assistance programs and discuss their work on rural housing development.

13. Guided Growth: Applications of Location Suitability Analysis for Housing: This webinar will provide participants with a process to evaluate locational suitability for homes in a community, with applications for increased home allowances through land use policies and zoning, focus areas for funding investments and land acquisition for affordable homes.

14. Collaborative Leadership to Increase Community Housing Opportunities: This webinar focuses on how to bring together key stakeholders like local governments, Continuum of Cares, Non-profit organizations, faith communities, advocacy groups, service and housing providers and funders to dive deeper. Presenters will show how to share data, strategies, and outcomes to increase efficiency and effectiveness in creating affordable housing.

15. Increasing Your Odds with Funders to Support Housing and Services: This webinar will focus on the ever-changing priorities and budgets of federal, state, and local funders that impact affordable housing and supportive services. The Contractor will share strategies to diversify verbiage in applying traditional and non-traditional funders so that local budgets dedicated to affordable housing and supportive services are sustainable and not significantly shifted by changing funder priorities.

16. Vouchers Without Vacancy: Fixing the Gap in Affordable Housing: While rental assistance vouchers are intended to help low-income families afford housing, they are often rendered ineffective due to a lack of available, affordable units in the housing market. Participants will explore the impacts of Housing Choice Voucher demand and potential solutions for reducing barriers to voucher use.

17. Preparing Communities for Extreme Heat and Post-Disaster Outages: This webinar will equip housing and community services staff, neighborhood community partners, and emergency managers with new strategies and tools to proactively plan for post-disaster power outages and reduce extreme heat-related health impacts among vulnerable residents. Presenters will review processes, present a new tool kit and checklists, and encourage community planning efforts.

18. Understanding Green and Resilient Construction: This webinar will educate construction managers, housing managers, and developers on third party certification programs including Florida Green Building Communities, National Green Building Standard, and Enterprise Green Communities (approved by Florida Housing within their RFAs) and the Insurance Institute for Business & Home Safety Fortified program. Program representatives will review resilient construction standards in these programs and discuss training needs for contractors.

19. Supporting Affordable Housing in Rural Communities- This training will support rural communities as they plan for possible additional housing funding. Presenters will discuss budget and LHAP considerations, improving outreach, re-evaluating and expediting current strategies, and options for online project management software. Participants will consider staffing options, administrative efficiencies, and contracting out various services. They will review options for new strategies like Rental Housing Assistance or Development, Replacement Housing, or Homeownership of New Construction.

#### **F. Previously Developed Webinars<sup>1</sup>**

1. Comprehensive SHIP Administration Series (Part 1): This introductory webinar covers the SHIP program's core elements, including income eligibility, LHAP development, and AHAC requirements. This session is designed to equip SHIP administrators with foundational knowledge and practical tools to strengthen program delivery.

2. Comprehensive SHIP Administration Series (Part 2): This session walks through a year-round timeline of SHIP responsibilities, offering guidance on implementing LHAP strategies. Participants will gain insights into effective tracking, reporting, fiscal management, and compliance practices.

3. Proficiency in Income Qualification Part 1: This is the first of a two-part training focused on resources available for SHIP administration in determining income. It covers the process of advertising based on the SHIP statute and rule as well as the LHAP, establishing a waiting list, the application intake process, setting priorities based on the LHAP, and determining household members to establish household size. Presenters will also explain how the Housing Opportunity Through Modernization Act (HOTMA) has updated rules related to household members and income verification.

4. Proficiency in Income Qualification Part 2: This webinar will focus on calculating assets and asset income. Presenters will explain how HOTMA has defined categories of assets and changed the rules for calculating asset income, and participants will learn how to calculate sources of income and complete the resident income certification form.

5. Community Partnerships for Housing: In this webinar, participants will gain insights into best practices for building effective partnerships with community organizations, small and corporate businesses, and other stakeholders. By leveraging these partnerships,

---

<sup>1</sup> Proficiency in Income Qualification Parts 1 & 2 will be offered twice during the Contract term.

participants will discover ways to supplement affordable housing development with community driven partnerships that contribute to neighborhood revitalization. This training will showcase practitioners who will provide successful examples of partnerships they've created and how they were integrated into their community housing strategies.

6. Terms of Assistance: This training will discuss the options for providing SHIP assistance, from offering grants and deferred loans to direct loans that must be repaid in monthly installments. Learn what is involved in establishing and recording the agreement.

7. AHAC Incentive Strategies (Part 1): This webinar is designed to offer a primer for new members to orient them to AHAC responsibilities. This webinar will go through the 11 required incentives each AHAC is required to consider as part of the SHIP program and provide best practices on conducting the work of the AHAC. Participants will learn about the timeline and activities involved with creating an AHAC report on incentive strategies.

8. SHIP Rent Limits Policy and Addressing Defaults: This training will introduce staff to using SHIP for rental housing, which comes with several rules and requirements. Attendees will learn about the Florida Housing's guidance on SHIP rental assistance, which exempts rent/utility deposit assistance from compliance with the SHIP rent limits. Other SHIP-related rental assistance and development will also be addressed, including eviction prevention assistance that can help a tenant struggling to pay past due rent. The webinar will also review the rules when SHIP is expended for rental new construction or rehabilitation.

9. LHAP Design Part 1: This webinar will assist local government staff in the preparation and implementation of the Local Housing Assistance Plan (LHAP), the document required for SHIP implementation. The presenters will advise participants how to update existing strategies, add a new strategy, and review all sections of the plan.

10. LHAP Design Part 2: This webinar will provide examples of the nuts and bolts of the plan update. Key topics to be addressed include properly defining terms of assistance and designing housing strategies that work in a changing market. The presenters will discuss housing incentive strategies and the role of the Affordable Housing Advisory Committee in crafting these incentives.

11. Making Your SHIP Program Market Responsive: This webinar will review best practices for structuring strategies that are effective in hot and cold markets and will offer guidance on building flexibility into program policies to quickly respond to shifting market conditions. Participants will learn to use valuable subsidies toward activities that can maximize access to affordable units in changing markets, and examine strategy design to address cost escalation, increased purchase prices, and low home valuations.

12. The Rehabilitation/Emergency Repair Process: The rehabilitation process requires housing administrators and their staff to work with homeowners, contractors, building inspectors, local officials, and funders. Understanding each of these groups and learning to work with them helps to avoid some of the problems that are commonly encountered in rehabilitation programs. The presenters will address weaknesses in rehab programs and best

practices to improve them. Topics include contractor selection and removal, scope of work, the bidding process, contract terms and award, inspections, payments, guarantees and warranties, and long-term compliance and monitoring.

13. Monitoring SHIP-Funded Rental Housing: Before investing in SHIP to build or repair rental housing, SHIP staff must learn the rules and requirements. This webinar addresses one of the biggest commitments, the requirement to monitor SHIP-funded rental units. The presenters will address SHIP rental housing monitoring requirements along with monitoring requirements for housing with blended financing from Housing Credits, SAIL, and more. Presenters will address methods for reviewing tenant income eligibility documentation. Participants will learn about rent affordability compliance responsibilities and the steps of the compliance monitoring process.

14. Preparing and Submitting the SHIP Annual Report: Presenters will provide guidance on how to complete each tab of the report along with instructions on how to obtain data needed for the certification, questions on foreclosure default, success stories and more. Additional topics include guidance on reporting incentive strategies, completing the certification form, and next steps if you are noncompliant.

15. New SHIP Staff Orientation & Training: This webinar will assist new SHIP staff in understanding the program rules that govern the administration of assistance strategies, as well as the timeline and targets tied to program administration, the LHAP, annual report and program compliance.

16. Comprehensive Pre-Development Process: This webinar provides guidance to nonprofit organizations on predevelopment activities and due diligence necessary prior to the development of affordable housing units. This webinar will address concept and design, nonprofit mission, site selection, assessing organizational capacity, and assembling the development team. Presenters will also cover construction/design, zoning and land uses, budgeting, and the timeframe of the predevelopment process. Participants will learn about the PLP application process, creation of the Development Plan, and the TA that assists nonprofits borrowing through this program to get from concept to construction.

17. Using Publicly Owned Land for Affordable Housing: This webinar will cover new requirements on the handling of land owned by public entities and provide guidance on best practices that can be implemented by local governments for compliance. Presenters will discuss criteria that may be used to evaluate land for addition to the affordable housing inventory as well as for possible acquisition. They will discuss methods by which local government and its special districts may strategically dispose of land to create opportunities to produce affordable housing. Participants will consider possible funding sources and criteria including weather resilience, physical criteria, and proximity.

18. Strategic Planning for Housing Nonprofits: In this webinar, presenters will share best practices in strategic planning for nonprofits, with a focus on how housing development fits into their missions and visions. Topics will include structure and components, avoiding "mission drift", setting benchmarks and evaluating performance. Presenters will also discuss

differences between a multi-year strategic plan and annual action plan, and the value of having a facilitator. The webinar will include further examples from nonprofits implementing these best practices.

19. Navigating the Live Local Act (LLA) SAIL RFAs: With additional multifamily rental development resources available through LLA SAIL, this session will guide participants through the current Requests for Applications (RFAs) and funding opportunities. Presenters will highlight key project types and eligibility criteria, providing practical insights into accessing these significant resources.

20. Navigating Live Local's Land Use Mandates: This training will provide guidance on the land use mandate of the Live Local Act. Presenters will take an in-depth look at all aspects of the land use mandate and provide implementation examples from local governments throughout the state.

21. Accessory Dwelling Units (ADUs) for Affordable Housing: Accessory dwelling units, also called granny flats, mother-in-law suites, and carriage houses, can be a smart growth tool for affordable housing and is a housing type supported by the Florida Legislature. Presenters will explain how local governments can ease barriers to ADU development and discuss how to develop ADUs as infill units for lower-income renters and family members. The Contractor's staff will provide a strategy as part of this training that may be used for SHIP-funded ADU development.

22. Property Tax Policy for Affordable Housing: Property tax policy can have a major impact on housing affordability. Whether you are looking at project feasibility for an affordable multifamily rental project, the monthly mortgage payment for a low-income homeowner, or trying to encourage market rate properties to lower their rents in exchange for an incentive or two, property tax policy can play a major role in housing policy. This webinar will provide a background on property tax law in Florida and address all the property tax policies in state law that are available for the production and preservation of affordable housing. Presenters will cover related topics including, but not limited to, the how statewide legislation such as the Live Local Act can impact property tax policy, the impact of property taxes on a development's bottom line, and how local property tax policies can be developed equitably.

23. Community Benefits and Outcomes of Permanent Supportive Housing (PSH): Permanent Supportive Housing is an essential component of the affordable housing stock. This type of development prioritizes persons most vulnerable in our communities, with the lowest incomes and highest service needs, including persons experiencing homelessness and individuals with special needs. This webinar will discuss how to analyze unmet housing needs, develop partnerships with community-based service providers, and financing PSH. The presenters will discuss community benefits including reduced costs on emergency room visits, jail time, police interventions, and more. Participants will hear from PSH developers about their experience with Florida Housing's competitive solicitation process and how they can effectively create partnerships with supportive service agencies to promote housing retention and permanent transitions out of homelessness and into stable housing. Attendees will learn



about the specific RFA's designed for supportive housing, as well as the team members needed and the process of successfully developing supportive housing.

24. Understanding Site Flood Risk Factors Before You Buy:- Selecting a site is challenging and a high-flood risk location can pose added costs to developers, property owners and residents. The Contractor's new Resilient Guided Growth approach will help affordable housing developers understand and quickly identify current and future flood risks and environmental hazards that can impact development, long-term safety, and affordability. The webinar will review the new resources, discuss assessment strategies, and share lessons learned regarding site improvement costs. Participants will also learn about reselling/disposition and recommendations for resilient design and construction for single family and multifamily properties on high-risk sites.

25. Preparing the Unsheltered or Displaced for Weather Events: This webinar is about preparing individuals experiencing homelessness for a coming weather event. The presenters will address the approaches taken by Continuum of Care agencies across Florida, along with how they coordinate with county emergency operations department staff. Participants will learn about the outreach steps communities may take prior to a hurricane, severe weather, or extreme cold.

26. Community-Based Asset Mapping: This webinar will open participants' eyes to existing local plans that include comprehensive housing needs assessments and market analyses. Attendees will learn how to reduce duplication of efforts by exploring how local planning documents intersect and overlap. They will also focus on how reviewing the Consolidated Plan's data sources and elements that contribute to analyzing the market during the conceptual stage in the predevelopment phase can help to improve the development project's scope.

27. Data-Driven Planning- This training will highlight the Contractor's publication on Data Driven Planning. It looks at the housing, disaster, demographic, transportation, and health data sources available to local planners, housing professionals, and elected officials to help them understand and respond to the affordable housing challenges in their communities. The presenters will discuss available resources and provide guidance on how to display, analyze, and interpret information to assist with decision making. Have your laptops ready for this hands-on exploration of data resources to use in housing assessments and program design.

28. First-Time Homebuyer Education & Counseling Best Practices: This webinar will encourage local governments administering purchase assistance programs to partner with HUD Approved Housing Counseling Agencies. The presenters will include experienced housing counselors who will report on changes and innovations in the housing counseling industry. Participants will learn about pre- and post-purchase topics such as homestead exemption, escrow shortages, shopping for services, estate planning, the qualifying process, the purchase process, loan products, parties involved, and home maintenance.

## **G. Local Workshops**

Local workshops that pertain to a topic of interest/need may be requested by one or more local governments, not-for-profits, or community-based organizations. The training consists of lectures, discussions, handouts, and other relevant information covering the requested topic. Examples of this form of training include local housing forums, Income Qualification classes, and new staff SHIP Orientation training.

## **H. Stakeholder Group Events**

Stakeholder group events may include gatherings such as housing forums, training summits, conferences, community capacity building events, or training opportunities. Affordable housing has risen to a top priority for both the public and private sector, local governments, community partners, chambers of commerce, and nonprofits who assemble events and request training. Stakeholder group events may also include presentations to local elected bodies, commissions, and councils.

Elected officials, planning staff, SHIP Administrators, and affordable housing developers may request training to educate on a variety of issues ranging from confusion or opposition to an affordable housing ordinance or incentive, NIMBY issues, or SHIP program basics. Such presentations will involve preparation, including interviews with key parties and reading comp plans, proposed ordinances, and minutes from prior meetings.

## **I. Affordable Housing Advisory Committee (AHAC) Training**

The Contractor will conduct a training for elected officials in six regions on how to comply with AHAC requirements and other affordable housing topics. The Contractor will:

1. Provide for training registration and logistics;
2. Conduct an analysis of local codes, housing plans, housing needs, and recent news for best practices to identify;
3. Coordinate with local officials, pre-training, to compile feedback on topics that they would like to have discussed;
4. Create and convene regionalized presentations of best affordable housing practices to meet local needs tailored to specific needs of each region;
5. Coordinate with Florida Housing Board members and staff as needed for training presentations;
6. Create a report on these workshops for the Florida Legislature, as required by the 2020 updated AHAC provisions in the SHIP Statute; and



7. Seek feedback post-workshop on regional projects, topics discussed, and other follow-up as necessary/applicable.

#### **J. Publications**

The Contractor will update their 'Creating a Local Disaster Housing Strategy' publication, originally published in 2019, to reflect current disaster recovery practices and resources. It focuses on creating disaster housing plans that involve SHIP staff, local emergency operations staff, planners, volunteer agencies, and other community partners. Contractor will update the step-by-step checklist, the disaster toolkit section, the timeline of housing recovery, and the summary of the Hurricane Housing Recovery Program and other Florida Housing disaster resources.

#### **K. Florida Housing Coalition Conference**

The Contractor will conduct a SHIP Roundtable and a variety of trainings offered over three days at the Contractor's in-person annual conference.

SHIP administrators who are registered for the conference will have the opportunity to attend the Roundtable at no additional cost. An additional 40 seats will be reserved for SHIP staff who are not registered for the full conference, available for a \$100 registration fee.

**REMAINDER OF PAGE INTENTIONALLY LEFT BLANK**

**EXHIBIT C  
FEES**

<b>TABLE 1 FEES</b>				
<b>Category</b>	<b>Unit Type</b>	<b>Cost per Unit</b>	<b>Units</b>	<b>Total</b>
<b>Major Initiatives</b>				
State Housing Strategy Working Group <sup>2</sup>	Training	\$26,400	1	\$26,400
Regional Roundtables	Event	\$8,000	6	\$48,000
Updated Publication: 'Creating a Local Disaster Housing Strategy'	Publication	\$5,000	1	\$5,000
AHAC Support Initiative <sup>3</sup>	Initiative	\$20,000	1	\$20,000
<b>Standard Catalyst Training</b>				
Telephone/Email TA	Month	\$9,200	12	\$110,400
Offsite Technical Assistance Hours	Hour	\$150	542.5	\$81,375
Site Visits	Day	\$1,950	20	\$39,000
Stakeholder Group Events	Event	\$2,800	7	\$19,600
Regional Workshops	Workshop	\$7,000	6	\$42,000
Workshops for Rural Communities	Workshop	\$7,000	3	\$21,000
Local Workshops	Workshop	\$5,250	2	\$10,500
Follow-up Hours for Visits, Events, Workshops	Hour	\$150	94	\$14,100
New Webinars	Webinar	\$4,000	19	\$76,000
Previously Developed Webinars	Webinar	\$2,500	30	\$75,000
AHAC Elected Officials Workshops (Two rounds in six regions)	Workshops	\$4,200	12	\$50,400
AHAC Report to the Legislature	Report	\$4,825	1	\$4,825
Conference Training (SHIP roundtable)	Event	\$20,000	1	\$20,000
<b>TOTAL</b>				<b>\$663,600</b>

**NOTES:**

- A. All items listed in this section are subject to funding availability.
- B. The contract line item and total amounts approved are to be considered "up to" amounts. Florida Housing is under no obligation to expend the entire contract amount.
- C. All budget items under workshops, webinars, and onsite TA are subject to approval prior to each event.

<sup>2</sup> See billing schedule outlined in Exhibit B, Item A.

<sup>3</sup> See billing schedule outlined in Exhibit B, Item C.

D. Subject matter for all workshops and webinars is subject to review and approval from Florida Housing prior to scheduling.

E. All published materials are subject to pre-approval by Florida Housing. This includes approving credentials of writers and contributors, printing costs which are verified by estimates/invoicing from a printer, and any other associated costs.

#### FINANCIAL CONSEQUENCES <sup>4</sup>:

Upon execution of this Contract, Florida Housing and the Contractor will develop a written timeline for the completion of the deliverables listed in Exhibit B. Failure by the Contractor to meet the established deadlines will result in financial consequences as outlined in Table 2 below.

<b>TABLE 2 FINANCIAL CONSEQUENCES</b>	
<b>Deliverable</b>	<b>Financial Consequences for Failure to Perform</b>
The Contractor will facilitate a State Housing Strategy Working Group focusing on Public Land Disposition as outlined in Exhibit B.	Failure to provide final action plan by May 29, 2026, shall result in a reduction in payment of \$500 per day for each day delinquent.
The Contractor will facilitate at least six State Housing Strategy Working Groups Roundtable Sessions.	Failure to conduct these roundtables and submit all applicable support documentation to Florida Housing staff by an established deadline(s) or by the end of the contract term, shall result in a reduction in payment of \$8,000 for every roundtable session not completed.
The Contractor will provide at least 19 new webinars as a part of the Catalyst program.	Failure to develop any required training by an established deadline(s) or by the end of the contract term, shall result in a reduction in payment of \$4,000 for every webinar not completed.
The Contractor will conduct 20 site visits as a part of the Catalyst program.	Failure to conduct these site visits and submit all applicable support documentation to Florida Housing staff by an established deadline(s), or by the end of the contract term, shall result in a reduction in payment of \$1,950 for every site visit not completed.

<sup>4</sup> Financial consequences will be limited to amounts received by the Contractor under this Contract and in no event shall such amounts exceed \$663,600 in the aggregate.

The Contractor will develop and conduct at least six regional workshops as a part of the Catalyst training program.	Failure to conduct these workshops and submit all applicable support documentation to Florida Housing staff by an established deadline(s), or by the end of the contract term, shall result in a reduction in payment of \$7,000 for every workshop not completed.
The Contractor will develop and conduct at least two local workshops as a part of the Catalyst training program.	Failure to conduct these workshops and submit all applicable support documentation to Florida Housing staff by an established deadline(s), or by the end of the contract term, shall result in a reduction in payment of \$5,250 for every workshop not completed.
The Contractor will develop and conduct at least two rounds of six workshops for AHAC officials as a part of the Catalyst training program.	Failure to conduct these workshops and submit all applicable support documentation to Florida Housing staff by an established deadline(s), or by the end of the contract term, shall result in a reduction in payment of \$4,200 for every workshop not completed.
The Contractor will develop one AHAC report to be submitted to the Florida Legislature.	Failure to draft and submit the AHAC report by an established deadline(s), or by the end of the contract term, shall result in a reduction in payment of \$4,800.
The Contractor will conduct a SHIP Roundtable discussion at their annual conference.	Failure to develop and conduct the SHIP Roundtable at the Contractor's annual conference shall result in a reduction in payment of \$20,000.