



**Transylvania County Planning Board
Thursday, May 9, 2024, at 6:00 PM**

**Community Services Building Conference Room
106 E. Morgan Street, Brevard, First Floor
Special Meeting Agenda**

CALL TO ORDER

- I. WELCOME**
- II. PUBLIC COMMENT** (15-minute time limit. Speakers are limited to three minutes.)
- III. AGENDA MODIFICATIONS**
- IV. CONSENT AGENDA**
 - A. Minutes (April 18, 2024)
 - B. Subdivision Approval and Updates
 - C. Transportation Updates
- V. NEW BUSINESS**
 - A. Transylvania County Housing Study Steering Committee
- VI. INFORMATIONAL OR DISCUSSION ITEMS**
 - A. Comprehensive Plan Work Session: Community Engagement Schedule & Infographics
- VII. PUBLIC COMMENT** (15-minute time limit. Speakers are limited to three minutes.)
- VIII. BOARD MEMBERS' COMMENTS**
- IX. ADJOURNMENT**

**PLANNING AND
COMMUNITY DEVELOPMENT**

Jeff Adams, Director
Ashley Minery, Planner
Darby Terrell, Planner



106 East Morgan Street, Suite 207
Brevard, NC 28712
828.884.3205
planning.transylvaniacounty.org

**Transylvania County Planning Board
April 18, 2024 at 6:00 PM
Cooperative Extension Conference Room,
106 East Morgan Street**

MINUTES

CALL TO ORDER

- I. **WELCOME:** Mr. Rick Lasater called the meeting to order at 6:07PM. Ms. Wendy Warwick, Mr. Mike Privette, Mr. Kimsey Jackson and Mr. Greg Cochran were present. A quorum was present. Mr. Herschel Johnson and Mr. Bramley Fisher were absent (excused). Planning Department staff Jeff Adams, Darby Terrell, and Ashley Minery were also present. Commissioner Jake Dalton was present. One member of the public was also present.
- II. **PUBLIC COMMENT:** (15-minute time limit. Speakers are limited to three minutes.): There were no public comments.
- III. **AGENDA MODIFICATIONS:** There were no proposed agenda modifications.
- IV. **CONSENT AGENDA:**
 - A. Minutes (March 21, 2024)
 - B. Subdivision Approval and Updates
 - C. Transportation Updates
- V. **INFORMATIONAL OR DISCUSSION ITEMS:**
 - A. Community Appearance Initiative Update

Ms. Minery explained the subdivision approvals and updates for the month. The Planning Department approved two subdivisions and nine exemption permits since the previous meeting. Ms. Terrell discussed driver changes for the Transportation Department. There was no further discussion of the consent agenda. Ms. Warwick moved to approve the consent agenda. Mr. Cochran seconded the motion. All present members voted in favor and the motion carried.

Mr. Adams showed maps of townships and voter precincts and explains the different ways of classifying jurisdictions. He also presented a map of past Community Appearance Initiative Properties. He also briefly explained the options for making changes to the current meeting room or moving future meetings to the Commissioners' Chambers. After a brief discussion, Mr. Privette moved to stay in the Community Services Conference Room. Ms. Warwick seconded the motion. All present members voted in favor and the motion passed. Mr. Adams also explained he would soon be meeting with the Tourism

Development Authority (TDA) to provide an update on the Community Appearance Initiative and the program's future funding.

B. Comprehensive Plan Work Session: Community engagement Schedule & Infographics

Mr. Adams presented a variety of infographics for various focus areas. He sought feedback on the style, readability, and relevance of the graphs. Data in areas such as demographics, home ownership, workforce commuting patterns, soil and water, agriculture lands, education, arts, environmental factors, health risk areas, tourism revenue, driving patterns, and collision reports. Mr. Adams also presented different branding options for the Comprehensive Plan. The board liked a design with a mountain scene.

VI. **PUBLIC COMMENT:** (15-minute time limit. Speakers are limited to three minutes.)

Commissioner Dalton talked about the economic success of farming in Transylvania County. He also answered some of the board members' questions on clean water and farmland sales. Mr. Bryan O' Neil, a member of the public, asked for clarification on the Comprehensive Plan's process and timeline.

VII. **BOARD MEMBERS' COMMENTS:** There were no board member comments.

VIII. **ADJOURNMENT:** Mr. Jackson moved to adjourn the meeting. Mr. Cochran seconded the motion. All present members voted in favor and the meeting adjourned at 7:50PM.

Ashley Minery, Planner

Rick Lasater, Chair

Transylvania County Planning Board

Staff Report:

THE BOARD OF COUNTY COMMISSIONERS HAS APPOINTED THE TRANSYLVANIA COUNTY PLANNING BOARD AS THE TRANSYLVANIA COUNTY COMPREHENSIVE HOUSING STUDY STEERING COMMITTEE. TPMA CONSULTANTS HAVE BEEN AWARDED THE CONTRACT TO COMPLETE THE STUDY THROUGH A GRANT FROM THE DOGWOOD HEALTH FOUNDATION.

Agenda Date: May 9, 2024

Prepared By: Jeff Adams

GENERAL INFORMATION

EXHIBITS

“A” Exhibits – Application Materials

A-1 Request for Qualifications for the Transylvania County Comprehensive Housing Study, October 2023;

A-2 TPMA RFQ Submission, dated October 18, 2023;

A-3 “Transylvania County Partners with TPMA on Housing Strategic Plan” Press Release, dated April 24, 2024;

Background

The Board of County Commissioners appointed the Planning Board as Steering Committee for the Comprehensive Housing Study. The Request for Qualifications prompted the submission of four qualified candidates from which TPMA was selected.

TPMA was awarded the contract and the introductory meeting with staff was held March 20th. The first round of community engagement begins in June, with a set of stakeholder meetings on Wednesday, June 5th and Thursday, June 6th.

Invitations for these events have been sent and a list of one-on-one interviews will be called in the coming weeks. The Comprehensive Housing Study will also engage community response through a housing specific survey to be coordinated with the public engagement events.

TPMA will gather the housing and socio-economic information and the feedback from the public engagement process to develop a plan to meet the affordable and workforce housing needs for the County. The Planning Board will play a vital role in helping to shape that plan.

Planning staff will provide monthly updates on the Comprehensive Housing Plan and will ask for Planning Board guidance and approval at key points along the planning timeline.

BOARD OF COMMISSIONERS

Jason Chappell, Chair
Jake Dalton, Vice-Chairman
Emmett Casciato
Larry Chapman
Teresa McCall

**COUNTY MANAGER**

Jaime Laughter
828-884-3100
Fax 828-884-3119

101 South Broad Street
Brevard, NC 28712

REQUEST FOR QUALIFICATIONS
FOR COMPREHENSIVE HOUSING STUDY
TRANSYLVANIA COUNTY

GENERAL PROJECT DESCRIPTION:

Transylvania County Government is requesting qualifications for firms to conduct a Comprehensive Housing Study for the county. Our goal is to obtain information about the type, size, location, and price of housing required to meet the current and future needs of residents living and working in the county. We would like to understand the market forces, planning and zoning regulations, infrastructure, land availability and local barriers that impact housing development. The consultant will provide a thorough analysis and make recommendations as to possible solutions.

BACKGROUND:***Transylvania County***

Transylvania County is a county located in Western North Carolina. The County has two municipalities including the City of Brevard and the Town of Rosman with a county population of 33,165. Transylvania County faces challenges in development with half of the county land area in state and national parks or forests, floodplain limitations and steep topography.

This study is intended to build upon the Asheville Area Housing Study.

SCOPE OF SERVICES

The County desires to develop a Comprehensive Housing Study that includes an estimate of the existing and future needs for housing throughout the region and an understanding of what is needed to drive development to fill this need.

The County would like to identify specifically where and how the housing market is not meeting the current and future needs of residents in terms of product, location, and pricing. The future need for housing should include long-term projections for the next 20 years in 5-year increments. The County would like to identify what the barriers are that have led to the local housing market apparently not meeting current and future needs.

The study should include a description of the methodology used and rationale behind all assumptions that are used. The study should also describe how the projections consider the many variables that affect housing demand, supply and affordability, with the study including but not limited to:

A. Service Area

Transylvania County: The area to be covered in the study includes all of Transylvania County including the two municipalities of the City of Brevard and Town of Rosman.

Minimum Required Data Elements / Analysis

The Consultant selected to complete the study is free to develop specific methodology as they deem appropriate. The final document should, at a minimum, quantify the following data elements:

1. Demographic Review (historical, current, and future 5 yrs., 10 yrs., 15 yrs., and 20yrs.) of Population/Households

- a. Growth trends and projections
- b. Age distribution
- c. Income distribution
- d. Household size

2. Economics

- a. Economic base - by industry and major employer, including type of business, number of people employed, and wages
- b. Job growth projects, industrial/economic expansions, and wage data
- c. Employment growth over the last ten (10) years
- d. Anticipated employment trends including employer expansions, contractions, plant openings and closings, etc.
- e. Provide a breakdown of typical wages by occupation
- f. Community patterns for workers, such as how many workers commute to and from surrounding areas.
- g. Housing costs as a percentage of income

3. Inventory of Existing Housing Stock

- a. By tenure (Rent, Own)
- b. By type (Single family, 1-4 units, multi-family, manufactured, vacation rental)
- c. By value (Property values, rents)
- d. By age
- e. Vacancy rates

4. Other Housing Issues

- a. Student (on and off campus), young professional, family, and senior (independent and senior) market analysis, including information on existing properties related to rents, vacancies, services, and amenities.
- b. The impact of housing on employee recruitment
- c. Workforce housing (80-120% of AMI) analysis
- d. Affordable rental housing (Tax Credit, Public Housing, Section 8, USDA) analysis
- e. Affordable housing ownership (USDA 502, First Time Homebuyer Programs, etc.) analysis and opportunities
- f. Special needs housing, including information regarding the extent of homelessness and/or unmet housing needs as a consequence of mental illness
- g. Housing market turnover/sales data, and for-sale market analysis
- h. Building permit history
- i. Infrastructure capacity/availability challenges
- j. Available buildable land analysis
- k. Property maintenance and code enforcement challenges
- l. Community planning and zoning challenges (within the context of allowable approaches under NC legal authority for local government)
- m. Rental market analysis, including information on pending developments and rental housing needs.
- n. Short-term rental analysis
- o. Single family housing analysis, including location, size, and state of repair.

B. Recommendations

The County would like an analysis done that provides suggested actions as allowable within NC local government statutory authorities including but not limited to policy changes, non-cash incentives, capacity building tasks and other ideas as to how to move forward in promoting the development of housing in the types and locations needed.

Specifically:

1. Broad recommendations identifying three to five focal points for the community that could be effective strategies for improving housing availability.
2. Specific recommendations (based on analysis of data collected):
 - a. What types of housing (i.e., owner occupied, rental, market, assisted elderly, special needs, workforce, affordable, student, young professional, vacation rental, etc.) should be developed now as well as in 5, 10, 15 and 20 years from now? What amenities are important to the needed types of housing? What price range is preferable for the needed types of housing?
 - b. What areas within the county should the needed housing types be located? This should include maps and visuals and distinguish between areas that have necessary infrastructure now and those that could be accommodated with reasonable investment in water and sewer infrastructure.
 - c. What best strategies might be implemented to address identified deficiencies in the maintenance and repair of both owner-occupied and privately owned rental properties?
 - e. A projection of notable fiscal impacts and key quality-of-life outcomes that would be experienced upon realization of the specified growth and development upon build-out.
 - f. A base proforma using typical land and development costs in the area and possible housing financial resources that could result in a viable project.

Any suggestions regarding alternatives or addition to this scope of service are also welcome.

DELIVERABLES

The Consultant will provide a Comprehensive Housing Study document in hard copy and electronic format. The document will include data charts and maps illustrating the analysis of the data and supporting recommendations that are made. In the recommendations, the consultant should include examples from other locations showing where these actions have been successful when possible.

PROPOSAL

All proposals are due no later than 4:00PM EST Wednesday, October 18th to
Jennifer Galloway
Housing Study RFQ
Transylvania County
101 S Broad Street
Brevard, NC 28712

Please provide 4 copies and one digital copy.

The following information should be included in the proposal:

- Provide examples of your team's prior experience in Housing Studies and the results of the recommendations made.
- Outline, in sufficient detail, the methods for identifying the housing needs and a proposed outline of the contents of the Comprehensive Housing Study.
 - Method of stakeholder engagement, including local government entities and active nonprofits that provide resources for housing needs in Transylvania County.
 - Strategy for sharing results with the public in a way that is easy to understand and that provides pathways for them to be a part of solutions.
- Identify the project manager and all team members(s) responsible for completing tasks. Include their resumes, areas of expertise, hourly rates, and number of hours each will spend on the project.
- Identify any tasks for which the county staff will be responsible.

- Specify the time, resources, and costs required to complete the Housing Study.
- Include a total timeline and total cost for the entire project with each task clearly identified in the timeline.
- Describe quality control procedure, scheduling and cost control methods to be utilized to ensure delivery of contracted services.
- Provide a financial statement that indicates the ability of the lead entity to complete this project. Please include any other projects that the team has completed.
- Provide references for projects of similar scope and size.

The consultant should be aware of the potential for new tasks to be added to the scope of services both before and after the process gets underway. Any tasks added by the county will be negotiated with the Consultant.



Qualifications for

Comprehensive Housing Study

October 18, 2023

Submitted to

Transylvania County, NC

Jennifer Galloway



Submitted by



Wendy Brewer, Senior Manager
wbrewer@tpma-inc.com
740-350-5880

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1. Introduction Letter

Dear Jennifer,

TPMA is pleased to present our firm's qualifications to conduct a Comprehensive Housing Study for Transylvania County (the county), including the City of Brevard and the Town of Rosman.

Our Housing Project Team is prepared to conduct research that considers the unique nature of Transylvania's housing development challenges. We understand that estimates show less than 20 percent of the county can be developed due to existing developments, publicly owned parks and forests, floodplains, and/or significant slopes. Careful planning for the remaining land will determine Transylvania County's future.

TPMA recognizes that Transylvania County faces a gap in housing availability and affordability for those in the workforce earning between 80 percent and 120 percent of median income—those earning too much for subsidized housing, and too little to afford much of the available housing stock. Our Project Team will formulate long-term projections for the next 20 years in 5-year increments. Working as a collaborative partner with the county, our study will identify the barriers that caused the local housing market to become unable to meet current and future needs and recommend strategies and implementation steps to address this situation.

[TPMA](#) has worked across the United States on housing, economic development, and planning projects. Our approach places great importance on understanding a community's demographic characteristics, emerging economic trends, and related opportunities that can support long-term growth. This approach allows our team to align strategies to immediate, short-term, and long-term priorities in meeting housing needs for all household types and income levels. Our recommendations are designed to fuel resiliency through economic diversity, resource alignment, and community vibrance.

Your TPMA team, led by Lindsay Bloos, includes housing experts that have an intimate understanding of growing communities and housing obstacles in various states. Should you have any questions on our proposal, please contact Wendy Brewer, Senior Manager at wbrewer@tpma-inc.com, or by phone at (740) 350-5880.

Sincerely,

Thomas P. Miller
President & CEO

2. TPMA Qualifications and Experience



TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. In keeping with that vision, we empower organizations and communities, through strategic partnerships and informed solutions that create positive, sustainable change.

We have a comprehensive understanding of the needs of both rural and urban communities through our extensive housing study and assessment work. TPMA has worked in communities of all sizes from Los Angeles, California to Cumberland, Indiana. Our experience in other unique locations such as Greenville, South Carolina; Moscow, Idaho; and Detroit, Michigan has broadened our team's ability to apply our expertise in communities of varying size across the United States on projects related to housing, economic development, workforce development, research and evaluation, strategic planning and more. Our approach seeks to align economic, quality of place, and talent development efforts that are customized to the strengths of each one of our project's local areas.

Our staff includes subject matter experts in housing and market research, workforce and economic development strategy, evaluation, and resource development. This will provide Transylvania County with a team that is able to produce customized research and analysis, understands how to communicate and build consensus among multiple audiences, defines strategy with measurable outcomes, and outlines clear action for implementation.

TPMA will conduct a housing study that includes suggested action steps that are allowable by the North Carolina local government statutory authorities, such as policy changes, non-cash incentives, capacity building tasks, and other recommendations for promoting the development of housing in the types and locations needed.

AFFORDABLE AND MARKET RATE HOUSING DEVELOPMENT EXPERIENCE

TPMA has experience collaborating with communities across the United States to design actionable implementation plans for the development of both affordable and market rate housing. TPMA brings experience working directly with communities, developers, and residents to find optimal housing solutions to respond to community housing needs. Our team brings experience securing the necessary funding streams and federal grant management to support recommendations to close the financial gap for recommended policies.

DIVERSITY, EQUITY, AND INCLUSION LENS AND FRAMEWORK

TPMA understands the importance of embedding diversity, equity, and inclusion (DEI) practices into all areas of the company and our work. We value participatory approaches, engaging community members and those affected most by programs to ensure their voices are being heard and measuring the impact of provided services.

RESEARCH & ANALYSIS CAPABILITIES

TPMA specializes in custom methodologies that combine quantitative and qualitative insights into tangible analysis. We employ a wide array of data sets and sources to paint a comprehensive picture of housing needs based on housing stock, market trends, and the demographic characteristics of our clients' communities. We design our deliverables to provide the right amount of data in easy-to-understand formats that highlight key findings linked to policy recommendations and actions.

SCALABLE UNDERSTANDING OF HOUSING PRIORITIES

TPMA understands that local housing markets must evolve to meet the needs of diverse residents, from seniors to persons with disabilities to buyers to renters. Our team has experience designing finance strategies for diverse types of housing to meet existing and future demands. We have recently completed similar housing studies that include work with Canton, GA; Dearborn County, IN; DeKalb County, IL; Fairborn, OH; Greenville, SC; Hiawatha, IA; Indiana Housing & Community Development Authority and the Palouse Region (Moscow, ID and Pullman, WA).

Current Housing Studies

TPMA is adept at preparing housing studies that provide communities with actionable recommendations and long-term strategies. The team is currently developing the following housing studies across the country:

- **City of Salisbury, NC - Housing Strategy;**
- **Town of Rolesville, NC - Affordable Housing Plan;**
- City of Fairfax, VA - Housing Assessment & Strategy Report;
- City of Northglenn, CO - Housing Needs Assessment & Policy Development;
- McClean County, IL - Regional Housing Recovery Plan;
- Okaloosa County, FL - Attainable Housing Strategic Plan; and
- St. Lucie County, FL - Housing Needs Assessment & Implementation Plan.

We Know North Carolina

TPMA has partnered with clients across the state of North Carolina to complete compensation studies, economic development plans, housing assessments, program evaluations, strategic plans, and workforce development projects for your neighboring cities, colleges, and counties. This diversity of projects has helped us develop an intimate knowledge of your state's economic ecosystem and allowed us to gain a deep understanding of the interdependent factors that drive regional growth, resiliency, and sustainability.

Recent projects in the state of North Carolina include:

- Blue Ridge Parkway Foundation, North Carolina Gateway Communities Economic Development Strategic Planning;
- Project Conserve Data Collection Tool Development & Staff Training;

- North Carolina A&T State University, Cooperative Extension Statewide Needs Assessment;
- North Carolina Department of Public Instruction, Career and Technical Education Department, Career Pathway Standards Development;
- Office of Economic Development, Mecklenburg County, Mecklenburg County Small Business Environmental Analysis; and
- Town of Harrisburg, NC, Strategic Economic Development Plan

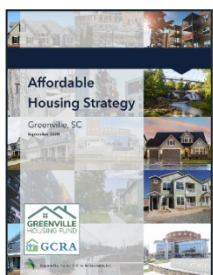
Past Housing Studies

TPMA has recently concluded the following housing projects which are similar in nature and display our team’s ability to finish projects on time and within budget:

- City of Canton, GA - Housing Study (2022);
- City of Hiawatha, IA - Housing Study and Needs Assessment (2020);
- City of Whiting, IN - Housing Market Study (2021);
- Greenville Housing Fund, SC - Affordable Housing Profile (2021);
- Housing Authority of the County of DeKalb, IL - Comprehensive Housing Needs Study (2021);
- Indiana Housing and Community Development Authority, IN - Multiple projects for over 10 years;
- Knox County Development Corporation, IN - Housing Study (2021);
- North Central Planning Commission, ND - Regional Labor & Housing Study (2021); and
- Okanogan County, WA - Housing Needs Study (2020).

Housing Study Report Examples

Greenville, SC Affordable Housing Strategy



The Greenville, South Carolina, metropolitan area has experienced increasing significant shortages of affordable housing for its residents. A citywide report that identified a projected housing gap of 9,000 units prompted municipal leaders to prioritize in-depth research and long-term planning. TPMA conducted background research on current conditions, 20+ stakeholder interviews, and generated a report of recommendations. TPMA partnered in building the final strategy, establishing a clear work program and a set of

metrics to track progress. Focus areas include affordable housing preservation, new affordable housing production across a variety of typologies, location of affordable housing throughout the metro area, housing finance and regulatory tools, and affordable housing capacity and coordination. This City and County effort encompasses a \$1.4 billion affordable housing strategy to preserve and produce 13,000 affordable units over ten years via a robust public-private partnership. The recommendations to create a Regional Housing Task Force, develop a Comprehensive

Homeowner Support Program, assist landlords and tenants through structured support programs, and establish a vision for future development (including the utilization of Federal and State funding sources) were included in an 80-page final deliverable that will be used to inform regional strategy over the next 5 years. Read the 2022 final report [here](#).

City of Northglenn, CO, Housing Needs Assessment and Policy Development



TPMA developed a housing needs assessment focused on various housing issues and compiles data regarding the housing market (costs, inventory, turnover, projected timelines etc.). Also, the team assists the city with creating policies informed by the assessment, related addressing apps and improving, incentivizing, and maintaining affordable and workforce housing options. TPMA proposed concrete policies, recommendations, language, and prioritization to guide the city through development. The Housing Needs Assessment also included a broad range of stakeholder facilitation to gain additional, local insights into the market and interview experts on the topic. Read the 2022 final report [here](#).

North Central Planning Commission, ND, Regional Labor & Housing Studies

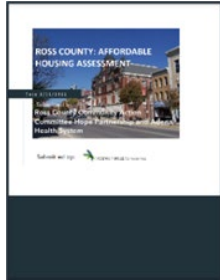


TPMA conducted a Regional Labor and Housing Study for the North Central Planning Council (NCPC), funded by the Economic Development Administration through the Supplemental Planning Grant for CARES Act Recovery Assistance. The area encompasses 6 counties within Region III of North Dakota.

The study required the Identification and assessment of the current workforce available, including compiling an income matrix by industry and workforce demographics by county. It also included the identification and assessment of the demographics of the potential workforce, the identifying and assessment of current job vacancies by type, pay and benefits, and typical cause of turnover, the compiling of a current workforce landscape, the identification of workforce barriers, which may include workforce capability gaps, daycare, and proximity to work site and the compilation of successful workforce programs or best practices.

The Housing Study also required an existing housing inventory and trend analysis through socio-economic data collection and analysis, a market rate and rental housing demand analysis, and extensive stakeholder engagement with up to 60 individual interviews conducted with housing market and real estate leaders and prominent community members. This information formed the basis for two final reports presented to NCPC with recommendations for future positive long-term impact in improving housing and labor needs. Read the 2021 final report [here](#).

Ross County, OH, Affordable Housing Assessment



The Ross County Community Action Commission, Hope Partnership Project, and Adena Health Systems needed a housing assessment to understand the trends impacting affordable and mix-income housing, zoning, and inclusionary housing ordinances (with special focus on recovery/mental health housing).

A Human Resource Services Administration Rural Community Opioid Response Program grant funded the project. Over the course of nine (9) months, TPMA performed extensive quantitative and qualitative analysis of the local community, its population demographics, and housing market, and determined significant findings in resident socioeconomics, housing availability, and housing affordability. Read the 2022 final report [here](#).

3. Results of Recommendations Made: Greenville

TPMA is selecting our collaboration with North Carolina's neighboring state to highlight the success of our housing recommendations to Greenville, South Carolina.

In October 2020, after months of study and community input, followed by an analysis of dozens of data points, Greenville Housing Fund and Greenville County Redevelopment Authority released a community-wide affordable housing strategic work plan. Created in partnership with TPMA, the plan synthesizes the primary causes of Greenville's exploding affordable housing deficit and identifies the barriers that have prevented the community from making significant inroads. Action steps and recommendations from the report cover topics ranging from affordable housing preservation measures to new housing production, including type and location, to innovative housing finance tools, and to capacity-building within the affordable housing development infrastructure. The community-wide plan seeks to cut Greenville's Affordable Housing deficit in half.

In 2022:

- Greenville Housing Fund (GHF) deployed \$6.5 million from Greenville Housing Impact Fund;
- GHF received \$4 million from the city of Greenville;
- County approved affordable housing tax incentives;
- County approved \$10 million in ARPA for affordable housing for the current biennium;
- GHF deployed \$1 million from Greenville County and city of Traveler's Rest on Harmony Ridge senior apartments;
- The Greenville Housing Fund utilized millions in federal and local money to produce 246 new affordable homes in Greenville County and preserve 240 affordable homes;

- The county's new policy, approved in October, gives tax breaks to developers who build affordable housing units for residents who earn between 40% and 80% of Greenville County's average median household income; and
- The city of Greenville was honored for its efforts with the 2022 Champion of Affordable Housing award.

In 2023:

- In February, the Greenville Housing Fund invested \$31 million to acquire a complex formerly known as The Ivy. The 212-unit complex is home to several low to moderate income families. It will open at least 20 percent of the units for people with housing vouchers. In addition to acquiring the property to preserve affordable housing, the housing fund is also setting aside \$5 million for renovations.
- Greenville Housing Fund received approval to use the city's affordable housing budget, private equity, and other resources to create a loan or bond program. The funding will let them leverage \$33 million for affordable housing in the coming years. The housing fund will frontload the money, then use the city's committed \$2.5 million for affordable housing annually to repay it.

This measure means the housing fund will be flush with cash up-front instead of spreading out the funding over several years. They will also find ways to save on interest payments. GHF will take the \$2.5 million commitment and amortize it because twenty-three million dollars today is a lot more impactful than \$2.5 million a year, over 12 years.

The capital will allow GHF Fund to launch a neighborhood-focused strategy, which will emphasize expanding access to affordable housing in the city's special emphasis neighborhoods—historically low-income, majority-minority communities. The affordable projects that can be accelerated include:

- Southernside Senior Apartments: A project to create 147 affordable units for seniors near Unity Park;
- Parkside Lofts at Unity Park: A project to create 242 affordable housing units;
- Riley at Overbrook: A project to create 88 affordable housing units; and
- Gateway at the Green: A project to create 72 affordable housing units.

4. Project Manager and Team Members



Aaron Finley, Strategic Advisor, OH



Lindsay Bloos, Project Manager, IN



Paul Cancilla, Research Specialist, NJ



Ben Helkowski, Local Engagement Expert, NC

Aaron Finley

Director, Housing & Community Development, TPMA, Ohio

LinkedIn: [aaron-finley-b60b4526](https://www.linkedin.com/in/aaron-finley-b60b4526)

Email: afinley@tpma-inc.com

Phone: 937-657-5490



Strategic Advisor

Aaron will serve as the strategic advisor and guide the overall approach to the housing study, recommendations, and implementation roadmap.

Professional Summary

Aaron is the director for Housing & Community Development at TPMA and he specializes in housing research and strategy, workforce development, and community resiliency. Data-driven and goal oriented, his approach is one of locating gaps and developing solutions. Aaron leads research projects at TPMA with specialized skill in the interpretation of complex data. He is particularly skilled in the transformation of complex challenges into communicable and achievable strategies and outcomes.

Aaron has designed propriety housing research methodology at TPMA, in addition to strategies for alignment of priorities to investment, land use plans, investment options, and innovative partnerships. He recently led Regional Labor & Housing Studies for North Dakota's North Central Planning Commission and is currently leading the Housing Needs Assessment and Policy Development for the City of Northglenn, Colorado, as well as a Housing Needs Assessment and Implementation Plan in St. Lucie County, FL. Aaron has helped to design propriety housing research methodology at TPMA, in addition to strategies for alignment of priorities to investment, land use plans, investment options, and innovative partnerships.

Education

English, MA, Kent State University

English, BA, Indiana University

Expertise

- Housing Strategies
- Workforce Development
- Housing Analysis
- Project Management

Relevant Experience

City of Northglenn

Housing Needs Assessment & Policy Development, CO

Okaloosa County

Attainable Housing Strategic Plan, FL

Technical Skills

- Gap Analysis
- Workforce Training
- Curriculum Design
- Solution Development

Lindsay Bloos

Senior Consultant, TPMA, Indiana

LinkedIn: [lindsay-bloos-iom-4ba93192](https://www.linkedin.com/in/lindsay-bloos-iom-4ba93192)

Email: lbloos@tpma-inc.com

Phone: 812-621-0101



Project Manager

As the Project Manager, Lindsay will ensure that all milestones are accomplished and all timelines are met during this Housing Plan engagement. She will serve as the main point of contact with the Transylvania County.

Professional Summary

Lindsay is a Senior Consultant on the Economic Development & Community Resiliency Team at TPMA. Her primary focus is engaging communities and developing actionable strategies for improving economic conditions and quality of life.

Lindsay has served as a key member of the TPMA team on many housing engagements including Dekalb County's (IL) Comprehensive Housing Needs Study, City of Canton's (GA) Housing Needs Assessment and Market Study, and Dearborn County's (IN) Housing Study.

Prior to joining TPMA, Lindsay served as Executive Director of the Madison Area Chamber of Commerce in Madison, Indiana where she worked with businesses to provide support and resources. In 2020, Lindsay organized and led the COVID-19 business response team in Madison, providing critical assistance and data. She served as an Executive Team member for the City of Madison's Stellar Communities designation, the Visit Madison Board of Directors, Madison Main Street Program's Economic Vitality committee, Madison's America's Best Communities committee, and the Indiana Chamber Executives Association.

Education

Sociology, BA, Franklin College

Certifications

Institute for Organization Management (OM), U.S. Chamber of Commerce Foundation

Certified Professional (CP), Indiana Chamber Executives Association

Diversity, Equity, and Inclusion in the Workplace Certification, USF Office of Corporate Training and Professional Education

Expertise

- Business Development
- Community Engagement
- Economic Development
- Strategic Planning

Relevant Experience

Salisbury, NC

Housing Strategy

St. Lucie County

Housing Needs Assessment & Implementation Plan

Okaloosa County, FL

Attainable Housing Strategic Plan

Paul Cancilla, AICP, PP

Consultant, TPMA, New Jersey

LinkedIn: [paul-cancilla-aicp-pp-152555171](https://www.linkedin.com/in/paul-cancilla-aicp-pp-152555171)

Email: pcancilla@tpma-inc.com

Phone: 814-860-6240



Research Specialist

As the project's Research Specialist, Paul will manage data collection and analysis in support of this Housing Study.

Professional Summary

Paul is an expert land use and community planning professional with experience working for public and private clients to develop plans and projects that create economically vibrant and high quality places that benefit the community. He is skilled with community outreach and consensus building, and public presentation.

Paul's expertise includes demographic research and analysis, geospatial research and analysis, proforma and fiscal impact modeling, and writing planning documents.

As a Staff Planner with H2M Architects + Engineers, Paul developed and wrote numerous planning documents for various municipalities including Master Plans, Redevelopment Plans, Affordable Housing Plans, and Open Space Plans. He coordinated and led community outreach efforts for planning documents utilizing online surveys and in-person workshops and meetings.

Education

Master of City and Regional Planning (M.C.R.P.), The Edward J. Bloustein School of Planning and Public Policy, Rutgers, The State University of New Jersey
BA, International Studies and Spanish
Allegheny College, Meadville, PA,

Relevant Experience

H2M Architects + Engineers
Staff Planner 2

Department of Community Affairs, Trenton, NJ
Data Intern

Expertise

- Community Outreach
- Demographic Research/Analysis
- Geospatial Research/Analysis
- Public Presentations

Skills

- Consensus Building
- Proforma/Fiscal Impact Modeling
- Writing Planning Documents

Ben Helkowski

Consultant, TPMA, North Carolina

LinkedIn: [ben-helkowski-professional](#)

Email: bhelkowski@tpma-inc.com

Phone: 440-829-3802



Research Specialist & Local Engagement Expert

Ben will support project research and stakeholder engagement.

Professional Summary

Ben is based in Asheville and started his career with the AmeriCorps program facilitating youth mentoring programs for underserved populations in Erie, PA. Following his year of service, he spent three years managing and directing an AmeriCorps VISTA intermediary sponsor project. He was responsible for writing and managing a federal grant, maintaining grant reporting processes, constructing a professional development curriculum, and building strategic community partnerships with nonprofit organizations government entities, and educational institutions.

He conducted research to identify local demographic and poverty statistics to support the AmeriCorps program grant and recommend projects based on community needs. He also served as a Business Engagement chair and Civic and Community Engagement member for a young professional group. In these roles, he was responsible for business outreach, marketing campaigns, and coordinating events.

Education

Organizational Leadership, MA, Mercyhurst University

Education Sport Industry, BS, Ohio State University

Relevant Experience

Indiana Housing and Community Development Authority, IN
Housing Research Study

Meridiam, NY
Data Analysis & Community Outreach

Expertise

- Data Analysis
- Relationship Management
- Financial Planning
- Data Tracking
- Technical Writing
- Emerging Business Collaboration

5. Methodology

Task 1: Project Launch and Administration

The Project Team will facilitate an in-person launch meeting with the County of Transylvania, the City of Brevard, and the Town of Rosman (the Transylvania Team) and housing stakeholders to make introductions and discuss any information that may help develop context for the Comprehensive Housing Study. We do not view this meeting as a formality but as a critical step to ensure alignment of expectations and arranging important details necessary for the smooth execution of the project. Discussion topics include:

- Scope of work, project plans, timeline, and deliverables;
- Roles and responsibilities;
- Communication preferences and monthly schedule for regular meetings;
- Desired outcomes and measures of success;
- Current housing plans and programs; and
- Logistics for stakeholder engagement.

TPMA values regular open communication with our clients. For this project, we propose monthly update calls throughout the process. We will use this time to provide updates and next steps for the project as well as an opportunity for feedback on the work being done and any adjustments that need to be made.

The role of the Transylvania Team will be to provide the Project Team with any local insights necessary at the beginning of the project. This could include information regarding stakeholder engagement participants, contacts with local chambers, identification of local housing experts, etc.

The TPMA Team will be led by housing expert Lindsay Bloos, advised by Aaron Finley, and supported by Paul Cancilla and Ben Helkowski as research specialists.

This task will result in a deliverable of a Project and Communications Plan

Timeline: November 2023

Task 2: Demographic Analysis & Housing Analysis

Existing Plans

Data collection and analysis are essential to understanding the local climate as it relates to housing. TPMA will initiate background research by reviewing existing regulations, policies, and local and regional plans including, but not limited to, the following resources:

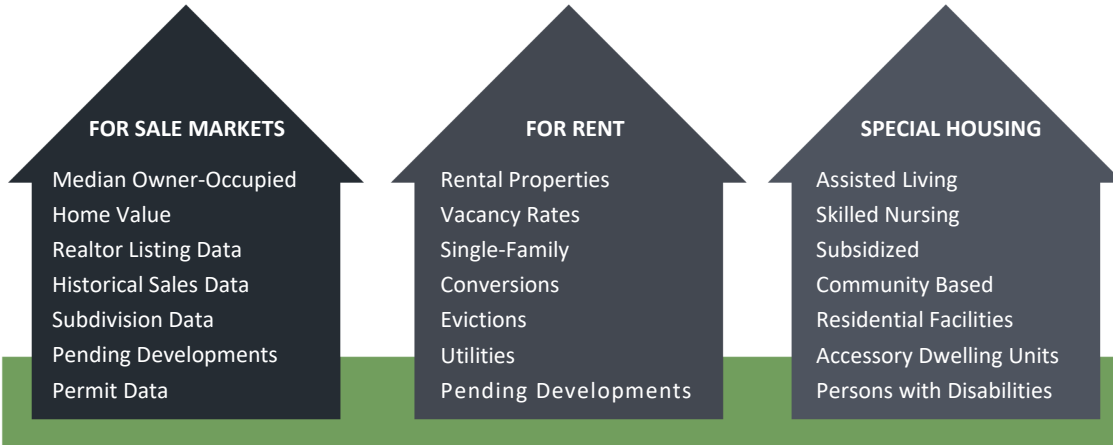
- 2025 Transylvania County Comprehensive Plan;
- 2015-2019 Comprehensive Economic Development Strategy;
- North Carolina General Statutes Chapter 160D updates to Transylvania County's land use ordinances;
- Asheville Regional Housing Consortium - consolidated Strategic Housing and Community Development Plan for Buncombe, Henderson, Madison, and Transylvania Counties;
- City of Asheville Housing Plan (when available);
- Comprehensive Land Use Plan, Building Brevard 2030;
- Ord 2023-13 Amending City of Brevard Housing Trust Fund;
- North Carolina General Statutes Summary of Affordable Housing Powers; and
- Western North Carolina Housing Needs Assessment (Bowen National Research).

This step will ensure that the Project Team has identified the pertinent resources and local planning context to build on previous work where possible and provide the necessary background when addressing key research questions.

Existing Housing Stock

As reported in the *Transylvania Times*, some residents feel that living in Transylvania is not affordable for many. In the Bowen National Research Report, which used U.S. Department of Housing and Urban Development (HUD) figures, Transylvania County has demand for an estimated 346 additional affordable rental units, with 227 serving senior citizens. Similarly, figures from the North Carolina Housing Finance Agency shows there is a demand for 523 additional affordable rental units, with 209 serving seniors. Recently, the North Carolina Housing Coalition has reported 22 percent of Transylvanians, or 3,046 households, are having difficulty affording their homes, meaning paying more than 30 percent of their income on housing.

In addition to the comprehensive review of regional studies and documents, and to gain full understanding of Transylvania's existing housing stock, TPMA will review secondary sources such as national databases (American Community Survey of the U.S. Census Bureau, CoStar, ESRI Business Analyst, Lightcast, Redfin, Trulia.com, and Zillow.com, etc.) to establish additional contextual understanding. Current data from local residential listing services will confirm housing values and price points for housing stock that makes up the local housing market. This analysis will serve as the basis for the final report and summarize key assumptions that inform final recommendations and strategies. The Project Team will partner with county leadership to take a windshield tour of the study area.



Demographic Review

A review of demographic data will provide additional context for current and future housing needs, as well as the types of housing and incentive programs that should be targeted. ESRI Tapestry Household data will be analyzed to understand household consumer housing lifestyles and housing preferences.

The Project Team will analyze the population and household characteristics of Transylvania County looking through a comparative lens to calculate the historical, current, and future profile, including projections at the five-year, ten-year, 15-year, and 20-year marks. The study will investigate:

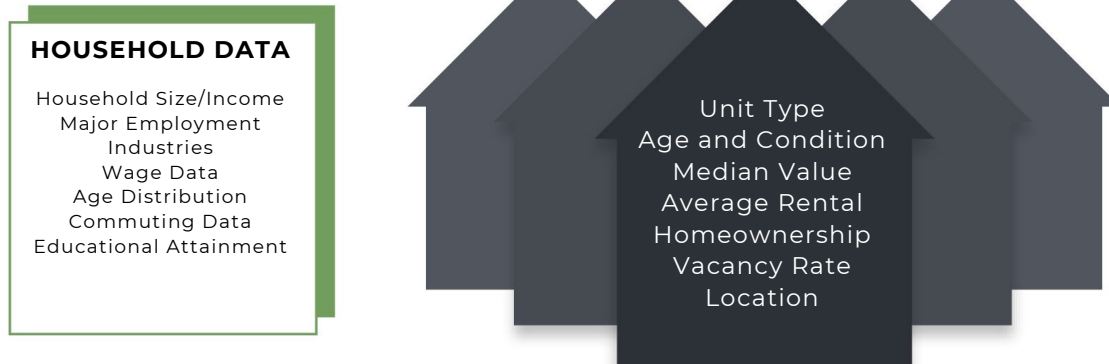
- Growth trends and projections;
- Age distribution;
- Income distribution; and
- Household size.

Economics

TPMA will review financial data to help determine monetary resources and needs of average homebuyers, renters, and special populations to determine their economic stability. TPMA will identify key data trends that characterize the state of the local housing stock and affordability in Transylvania based on the initial data collection. In addition, TPMA will complete an analysis of the for-sale housing market and rental markets that integrates a county profile into in-depth analysis of access to local housing, including affordability and market rate.

The Project Team will dive into understanding the economic ecosystem in Transylvania County. Our experts will analyze the county's economic base by industry and major employer, including type of business, number of people employed, and wages. Topics to be explored may include, but will not be limited to job growth projects, industrial/economic expansions, employment growth over the last ten (10) years, and anticipated employment trends including employer expansions, contractions, plant

openings and closings, etc. We will drill down into the numbers to provide a breakdown of typical wages by occupation and track community patterns for workers, such as how many workers commute to and from surrounding areas. To determine affordability, TPMA will calculate housing costs as a percentage of income.



This task will include an in-person windshield tour and a deliverable of an Affordable Housing Summary.

Timeline: December 2023 - February 2024

Task 3: Community Engagement

TPMA employs a variety of engagement activities that build on relationships with trusted community partners to expand reach and establish credibility. Our team collaborates with organizations with established and respected relationships with their constituents who invite and support participation in planning initiatives.

Interviews and/or Discussions

The Project Team will partner with county leadership schedule a series of virtual one-on-one interviews and/or small group discussions with community stakeholders from the county; the City of Brevard; the Town of Rosman; Asheville Regional Housing Consortium, which includes Transylvania County; realtor organizations, business representatives, social service representatives, education partners, etc. Interviews let the Project Team connect with local groups and individuals who are intimately familiar with Transylvania’s real estate market and housing situation.

Survey

TPMA will also conduct a community housing survey to assess current housing interests, barriers, and needs. This survey will gather insights from households and residents across the county. To capture the views and voices of underrepresented

residents, TPMA will work with the county to identify the best channels (church, local influencers, social workers, various social media outlets, Transylvania NAACP, etc.) to reach these groups. The participation of diverse populations in stakeholder engagement processes is essential for an attainable and affordable housing strategy. Outreach and education will empower underrepresented communities and support the use of affordable housing resources.

TPMA understands how important it is to the Transylvania Team to build additional ways of communicating about the housing study process and results with their community members in ways that are easy to understand and provide pathways for all residents to be a part of solutions. Our Project Team looks forward to discussing other avenues of engagement and communication that are a fit for the community values and project budget.

This task will result in a deliverable of a Community Feedback Summary.

Timeline: December 2023 - February 2024

Task 4: Housing Needs Analysis

To identify strategies to meet current and anticipated future housing needs, TPMA will complete an analysis of the for-sale housing market and rental markets in Transylvania County that integrates demographic data into an in-depth analysis of access to local affordable housing. The analysis will also estimate current and future demand for housing based on existing housing stock, population growth, and projected development. This will serve to inform strategies recommended for the area to adequately address housing demand in the short-term (2-5 years), mid-term (5 and 10 years), and long-term (20 years). Housing market research will profile the housing inventory:

- By tenure (rent, own);
- By type (single family, 1-4 units, multi-family, manufactured, vacation rental);
- By value (property values, rents);
- By age; and
- Vacancy rates

The Project Team will investigate potential housing development issues, including, but not limited to, the following:

- Student (on and off campus), young professional, family, and senior (independent and senior) market analysis, including information on existing properties related to rents, vacancies, services, and amenities;

- The impact of housing on employee recruitment;
- Workforce housing (80-120 percent of Area Median Income (AMI) analysis);
- Affordable rental housing (Tax Credit, Public Housing, Section 8, U.S. Department of Agriculture (USDA)) analysis;
- Affordable housing ownership (USDA 502, First Time Homebuyer Programs, etc.) analysis and opportunities;
- Special needs housing, including information regarding the extent of homelessness and/or unmet housing needs because of mental illness;
- Housing market turnover/sales data, and for-sale market analysis;
- Building permit history;
- Infrastructure capacity/availability challenges;
- Available buildable land analysis;
- Property maintenance and code enforcement challenges;
- Community planning and zoning challenges (within the context of allowable approaches under North Carolina legal authority for local government);
- Rental market analysis, including information on pending developments and rental housing needs;
- Short-term rental analysis; and
- Single family housing analysis, including location, size, and state of repair.

Needs, Gaps, & Barriers Report

Through the research conducted for the demographic and economic affordability analyses, TPMA will develop a strong understanding of the existing housing market to quantify housing needs, financial gaps, and common barriers that may persist in Transylvania County. This analysis will pay special attention to low- and moderate-income populations, diverse types of affordable housing units, and zoning and land use opportunities.

TPMA will conduct a Needs, Gaps, and Barriers Analysis identifying factors that may prevent residents and/or future residents from accessing affordable housing.

TPMA will examine opportunity areas in the county, review policies and regulations that affect development opportunities, and define unit types best suited for the market. By developing a firm grasp on where Transylvania is currently in terms of housing, affordability, population, and economics, the Project Team can then proceed with data-informed projections about where the area is headed. The trends, demand, and projections unveiled during the analysis will inform opportunities and challenges unique to the county.

This investigation and analysis will inform strategies recommended for the area to adequately address housing demand.

This task will result in a deliverable of a Needs, Gaps, and Barriers Analysis Summary.

Timeline March - April 2024

Task 5: Housing Strategy & Implementation Roadmap

At TPMA, we pride ourselves on submitting reports and other deliverables on time and in accordance with client preferences. We specialize in turning data into easy-to-use reports for organizations through accessible writing, logical formatting, and clear graphics. We welcome collaboration throughout the report writing process to ensure adequate time to incorporate client feedback.

Upon completion of all project activities, TPMA will produce a preliminary draft document of the final Comprehensive Housing Study (CHS) that addresses the needs of Transylvania and includes data charts and maps illustrating the analysis of the data and supporting recommendations that are made.

To create the CHS, the Project Team will incorporate the existing document and quantitative data review, the Affordable Housing Summary, the Needs, Gaps, and Barriers Analysis Summary, and the Community Feedback Summary into a draft report that will include key findings and summarize the results of all data analysis and leadership input.

Our Project Team will present their analysis and share suggested actions as allowable within North Carolina local government statutory authorities such as policy changes, non-cash incentives, capacity building tasks, and other ideas as to how to move forward in promoting the development of housing in the types and locations needed.

The report will include:

- Broad recommendations identifying three to five focal points for the community that could be effective strategies for improving housing availability.
- Specific data-driven recommendations that address the following:
 - What types of housing (i.e., owner occupied, rental, market, assisted elderly, special needs, workforce, affordable, student, young professional, vacation rental, etc.) should be developed now as well as in 5, 10, 15 and 20 years from now? What amenities are important to the needed types of housing? What price range is preferable for the needed types of housing?
 - What areas within the county should the needed housing types be located? Our recommendations will include maps and visuals and distinguish between areas that have necessary infrastructure now and those that could be accommodated with reasonable investment in water and sewer infrastructure.
 - What best strategies might be implemented to address identified deficiencies in the maintenance and repair of both owner-occupied and privately owned rental properties?

- A projection of notable fiscal impacts and key quality-of-life outcomes that would be experienced upon realization of the specified growth and development upon build-out.
- A base proforma using typical land and development costs in the area and possible housing financial resources that could result in a viable project.

Our research and recommendations will be informed by the *Asheville, North Carolina Region Housing Needs Assessment* report (most often referred to as the Bowen Report) about the Asheville region, which includes Transylvania County. We also look forward to the insights shared in the new Asheville Affordable Housing Plan when it becomes publicly available.

We will see if our findings confirm or differ from the previous research which found that vacancy rates in the region are relatively low, which means there is low rental availability, when compared to the vacancy rates in more balanced real estate markets. The report also will answer questions such as:

- Is Transylvania experiencing challenges associated with housing affordability, which can be argued to be largely the result of the limited availability of housing stock?
- Can the high price of housing in Transylvania be attributed to factors such as the heavy influence of tourism and related second-home purchases?
- Because much of Transylvania is closed to easy development due to the amount of land held publicly, the presence of river floodplains throughout, and the
- amount of land with steep slopes, would infill development (the act of building on unused or underused land located within the existing built environment) be a way to increase housing supply?

The Comprehensive Housing Study report will consider if some of the incentives a neighbor like Asheville offers to mixed-use projects might work in the smaller communities of Transylvania, such as discounts on sewer-line connections, forgiveness for permitting fees, property-tax abatements and density bonuses that allow developers of mixed-income complexes to pack more units on each acre of land.

Strategic consideration will also be given to potential partnerships which may be able to provide the middle housing that is not currently prevalent in Transylvania. Middle housing refers to housing typologies that allow for more variation and diversity of housing, such as duplexes, triplexes, townhouses, courtyard apartments, and small multiplexes. These housing types are of similar scale to detached single-family housing and fit within a neighborhood context. The benefits of middle housing must be weighed against community sentiment that may wish to preserve a tradition of detached single family homes.

Our Project Team is sensitive to the concerns that more homes within the county could change the character of neighborhoods and our recommendations always consider the massing, scale, and character of existing neighborhoods as part of our research.

TPMA will design a final report which will include:

- Executive summary;
- Housing data report;
- Analyses;
- Project matrix (including housing needs, infrastructure needs, funding sources, etc.);
- Best practices for housing-related policies and internal processes;
- Development tools for housing development;
- Organizational strategies and partnerships; and
- 20-Year Housing Plan and Roadmap

The Project Team will present the study findings, strategic recommendations, and the implementation roadmap to the Transylvania Team for a brief review period for edits/revisions and will make any adjustments as directed before completing the final document.

Data will be presented in easy-to-understand narrative suitable for a variety of audiences with labeled maps, tables, and graphics where appropriate. The assessment will outline recommendations and supporting assumptions related to housing.

The Project Team will be available to present the final report to the Transylvania Team and answer any questions in a virtual session if that is desired. TPMA will deliver the Comprehensive Housing Study document in hard copy and electronic format.

This task will result in a deliverable of a Comprehensive Housing Study with strategic recommendations and an implementation roadmap.

Timeline: May - July 2024

6. Total Timeline

	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.
Project Management									
Communication & Updates									
Task 1: Launch									
Task 2: Demographic & Housing Analyses									
Task 3: Community Engagement									
Task 4: Housing Needs Analysis									
Task 5: Housing Strategy & Implementation Roadmap									

7. Cost Proposal

TPMA can perform the above outlined scope of work for a total cost of **\$94,000.00**. This cost is inclusive of all staff time, travel, and materials. There are no further expenses that would need to be reimbursed by Transylvania County. Our firm recognizes the fiduciary responsibility of government agencies and makes every effort to design efficient project budgets that leverage the unique expertise of individual team members.

Task	Cost
Task 1: Launch	\$5,074
Task 2: Demographic & Housing Analyses	\$25,124
Task 3: Community Engagement	\$22,434
Task 4: Housing Needs Analysis	\$18,109
Task 5: Housing Strategy & Implementation Roadmap	\$19,079
Travel	\$4,180
Total Engagement Cost	\$94,000

Staff Member	Hourly Rate	Total Hours
Aaron Finley	\$285	30
Lindsay Bloos	\$255	115
Paul Cancilla	\$215	100
Ben Helkowski	\$215	115
Project Management and Creative Services	\$160	18

8. Quality Assurance/Control Procedures

TPMA assigns a project manager/lead to every engagement to ensure miles stones are accomplished, timelines are met, and polished deliverables are produced to meet and exceed partner expectations. Frequent two-way communication ensures small issues are resolved before they grow and any changes to the project parameters are carefully evaluated and approved by both partners before they are implemented. The Project Team will take great care to review our outputs for completeness, correctness, and consistency with the agreed-upon standards before delivery. We will share drafts with your team and invite your review and feedback so that we may make the revisions you request. Our management team closely monitors the firm's capacity tracking tools to ensure that we will always have qualified staff members available to complete your engagement.

9. Financial Statement

The financial statement at the end of this proposal shows TPMA to be a soundly managed firm in good fiscal health that is well able to complete this engagement.

10. Client References

Town of Northglenn - Housing Needs Assessment & Policy Development
Sara Dusenberry, Senior Planner
303-450-8836/ sdusenberry@northglenn.org

North Central Planning Commission, ND - Regional Labor & Housing Study
Megan Langley, Founder and Executive Director
701-303-0840/ megan@strengthennd.com)

Ross County - Affordable Housing Assessment
Audrey Barker, Program Manager
740-656-2341/ abarker@adena.org



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THOMAS P. MILLER & ASSOCIATES, LLC

FINANCIAL STATEMENTS

Together with Independent Accountants' Compilation Report

DECEMBER 31, 2022 AND 2021

GREENWALT CPAs
We Deliver Peace of Mind

INDEPENDENT ACCOUNTANTS' COMPILATION REPORT

To the Shareholder of Thomas P. Miller & Associates LLC:

Management is responsible for the accompanying financial statements of Thomas P. Miller & Associates LLC (an S Corporation), which comprise the balance sheets as of December 31, 2022 and 2021, and the related statements of income and member's equity for the years then ended in accordance with the accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

Management has elected to omit substantially all the disclosures and the statements of cash flows required by accounting principles generally accepted in the United States of America. If the omitted disclosures and the statements of cash flows were included in the financial statements, they might influence the user's conclusions about the Company's financial position, results of operations, and cash flows. Accordingly, the financial statements are not designed for those who are not informed about such matters.

Accounting principles generally accepted in the United States of America require that leases with terms longer than 12 months be recognized as right-to-use assets and lease liabilities on the balance sheet. Management has informed us that the leases in the accompanying financial statements have not been recognized as right-to-use assets and lease liabilities on the balance sheet. Management has not determined the effect of this departure on the financial statements.

The Company's financial statements for the year ended December 31, 2021, were subjected to a compilation engagement by other accountants, whose reported dated June 22, 2022, stated that they have not audited or reviewed the 2021 financial statements and do not express an opinion, a conclusion, nor provide any assurance on those financial statements.

The 2022 supplementary information contained in Exhibit I and II is presented for the purpose of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management. The supplementary information was subject to our compilation engagement. We have not audited or reviewed the supplementary information and do not express an opinion, a conclusion, nor provide any assurance on such information.

Greenwalt CPAs, Inc.

April 4, 2023



THOMAS P. MILLER & ASSOCIATES, LLC
BALANCE SHEETS
DECEMBER 31, 2022 AND 2021

ASSETS

	2022	2021
CURRENT ASSETS		
Cash	\$ 589,995	\$ 575,511
Accounts receivable	1,003,836	1,148,786
Prepaid expenses	32,679	28,613
<i>Total current assets</i>	<u>1,626,510</u>	<u>1,752,910</u>
PROPERTY AND EQUIPMENT		
Vehicles	33,522	-
Computer equipment	87,912	87,912
Furniture and fixtures	50,883	50,883
Leasehold improvements	839	839
	<u>173,156</u>	<u>139,634</u>
Accumulated depreciation	(143,268)	(135,269)
<i>Net property and equipment</i>	<u>29,888</u>	<u>4,365</u>
INTANGIBLE ASSETS		
Organization costs	10,614	10,614
Accumulated amortization	(10,614)	(10,142)
<i>Net intangible assets</i>	<u>-</u>	<u>472</u>
TOTAL ASSETS	<u>\$ 1,656,398</u>	<u>\$ 1,757,747</u>

LIABILITIES AND MEMBER'S EQUITY

CURRENT LIABILITIES		
Accounts payable	\$ 132,060	\$ 132,185
Credit card payable	14,432	9,243
Accrued payroll	158,542	149,905
Accrued expenses	5,917	-
<i>Total current liabilities</i>	<u>310,951</u>	<u>291,333</u>
MEMBER'S EQUITY	<u>1,345,447</u>	<u>1,466,414</u>
LIABILITIES AND MEMBER'S EQUITY	<u>\$ 1,656,398</u>	<u>\$ 1,757,747</u>

See independent accountants' compilation report.

2



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THOMAS P. MILLER & ASSOCIATES, LLC
STATEMENTS OF INCOME AND MEMBER'S EQUITY
FOR THE YEARS ENDED DECEMBER 31, 2022 AND 2021

	2022	2021
CONSULTING REVENUE	\$ 6,431,509	\$ 5,687,526
COST OF SERVICES (EXHIBIT I)	<u>3,269,768</u>	<u>3,157,296</u>
GROSS PROFIT	3,161,741	2,530,230
GENERAL AND ADMINISTRATIVE EXPENSES (EXHIBIT II)	<u>3,138,080</u>	<u>2,381,357</u>
NET OPERATING INCOME	<u>23,661</u>	<u>148,873</u>
OTHER INCOME (EXPENSE)		
Other income	18,047	754,394
Interest income	-	13,241
Interest expense	(132)	-
State taxes	<u>(5,950)</u>	<u>(18,373)</u>
<i>Total other income, net</i>	<u>11,965</u>	<u>749,262</u>
NET INCOME	35,626	898,135
DISTRIBUTIONS	(156,593)	(1,280,779)
MEMBER'S EQUITY, BEGINNING OF YEAR	<u>1,466,414</u>	<u>1,849,058</u>
MEMBER'S EQUITY, END OF YEAR	<u>\$ 1,345,447</u>	<u>\$ 1,466,414</u>

See independent accountants' compilation report.

3



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THOMAS P. MILLER & ASSOCIATES, LLC
SCHEDULE OF COST OF SERVICES
FOR THE YEAR ENDED DECEMBER 31, 2022

Exhibit I

	<u>2022</u>
Salaries and payroll taxes	\$ 2,502,483
Employee benefits	227,425
Contract labor	448,269
Travel, entertainment, and meals	<u>91,591</u>
<i>Total cost of services</i>	<u><u>\$ 3,269,768</u></u>

See independent accountants' compilation report.

4



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THOMAS P. MILLER & ASSOCIATES, LLC
SCHEDULE OF GENERAL AND ADMINISTRATIVE EXPENSES
FOR THE YEAR ENDED DECEMBER 31, 2022

Exhibit II

	<u>2022</u>
Salaries and payroll taxes	\$ 1,679,118
Employee benefits	101,149
Contract labor - administrative	165,018
Staff development	102,669
Staff retreats	40,494
Rent and facilities cost	58,396
Property taxes	8,596
Office expense	28,924
Phone and internet	36,741
Computer related costs	139,299
Sales and marketing	165,757
Business insurance	26,314
Professional fees	142,542
Board fees	105,085
Travel, entertainment and meals	24,507
Bad debt	206,926
Dues and subscriptions	67,476
Depreciation and amortization	8,471
Other operating expense	<u>30,598</u>
<i>Total general and administrative expenses</i>	<u><u>\$ 3,138,080</u></u>

See independent accountants' compilation report.

5

For Immediate Release

April 24, 2024



Transylvania County Partners with TPMA on Housing Strategic Plan

(Transylvania County, North Carolina) – Transylvania County has hired consulting firm, TPMA, to begin the creation of a comprehensive housing study that will help identify community housing gaps, needs, and barriers. County staff will work with TPMA to align the activities of this study with other current planning efforts. TPMA will work with county staff to perform economic research and analyses, conduct key stakeholder and community engagement, and suggest recommendations.

“Our community is well aware of the housing challenges that our county faces, specifically to serve our workforce, and those challenges exist from county line to county line,” said Jaime Laughter, Transylvania County Manager. “This plan will facilitate a unified approach by identifying strategies that address the complex root causes of our housing supply deficit.”

“It is truly commendable that Transylvania County is fully dedicated to addressing the urgent housing needs of their community by involving community stakeholders and citizens right from the outset. Through community engagement facilitated by TPMA, we aim to capture diverse perspectives, needs, and desires of residents, coupled with data analysis, to develop a strategic comprehensive housing study. This collaborative effort will pave the way for housing solutions that cater to the needs of all,” said Melanie Thompson, Senior Housing Consultant and Project Lead for TPMA.

###

For more information on this initiative, you may reach out to:

Transylvania County Planning & Community Development

planning@transylvaniacounty.org

828.884.3205



About TPMA: TPMA empowers organizations and communities through strategic partnerships and informed solutions that create positive, sustainable change. For community champions who are loyal to improving local and regional economic outcomes, TPMA provides professional consulting services and delivers transparent insights to the complete workforce, education, and economic development ecosystem that allows them to move forward, together. TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. Visit www.tpma-inc.com and follow TPMA on [LinkedIn](#), [Facebook](#), and [Twitter](#).

Memorandum

From: Jeff Adams, Planning, Transportation & Community Development
To: Transylvania County Planning Board

Agenda Date: May 9, 2024
Subject: Annual Report
Contact: Jeff Adams, jeff.adams@transylvaniacounty.org

Attachment(s):

- 1. Planning Board 2023-24 Annual Report of Activities**
- 2. Comprehensive Plan Timeline**
- 3. Comprehensive Plan Community Engagement Schedule**

Purpose: Review the 2023-24 Annual Report

Background: In accordance with the Transylvania County Planning and Development Charter, section 16-27, The Planning Board is tasked with preparing an annual report to provide to the Transylvania County Board of Commissioners in May of each year.

An annual report is a review and confirmation of the work that the Planning Board has completed in the last year.

The Planning Board recommended an update of the Transylvania County 2025 Comprehensive Plan, and forwarded the recommendation, along with a recommended timeline to The Board of Commissioners for their review. In November, the Board of Commissioners approved the launch of the 2050 Comprehensive Plan for the Spring of 2024 and the attached Timeline and Community Engagement Schedule is attached.

Financial Impact: None

Strategic Plan Goal & Strategy:

Goal 3: "County government is service driven, transparent and performance based with more active and engaged citizens."

Strategy 3B: *“Provide timely, accurate, transparent and informative communication to the public and across the organization with superior customer service delivery.”*

Recommendations: Review the attached Annual Report and provide feedback or approve Report as provided.



Transylvania County Planning Board Annual Report of Activities

Meeting Date	Meeting Type	Business
July 20, 2023	Regular	<i>Cancelled</i>
August 15, 2023	Special Called	Comprehensive Planning Work Session
September 21, 2023	Regular	Comprehensive Planning Community Engagement Work Session Community Grants Program
October 19, 2023	Regular	Village at Longcliff Re-subdivision & Phased Development Community Appearance Initiative Comprehensive Plan Community Engagement Work Session
November 16, 2023	Regular	Community Grants Program Announcement Comprehensive Plan Survey Work Session Noise Ordinance
December 21, 2023	Regular	CAI# 23-01 Powell Property Comprehensive Plan Survey Work Session
January 18, 2024	Regular	Comprehensive Plan Survey Work Session
February 15, 2024	Regular	Comprehensive Plan Issue Areas Work Session
March 21, 2024	Regular	CAI# 24-01 Manner Property Comprehensive Plan Infographics Work Session
April 18, 2024	Regular	CAI Update Comprehensive Plan Update
May 9, 2024	Special Called	Annual Report Review Affordable Housing Study Comprehensive Plan Kick-off & Timeline Announcement
June 20, 2024	Regular	TBD

2050 Comprehensive Plan - DRAFT Work Plan Schedule																						
Project Step	2023				2024								2025									
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Jan	Feb	Mar	Apr	May	June	
Step 1. Project Planning	S/PB																					
a. 2025 Comprehensive Plan Review																						
b. Comprehensive Plan Examples																						
c. Work Plan and Schedule																						
e. Marketing and Branding																						
f. <i>Report to Commissioners</i>																						
Step 2. Community Assessment	S/PB																					
a. Technical Planning Elements Report																						
b. Key Indicators																						
c. <i>Report to Commissioners</i>																						
Step 3. Community Participation					S/PB/P																	
a. Survey and Other Questions																						
b. Kickoff Meeting																						
c. Open Houses (Community Areas)																						
d. Vision Statement																						
e. Opportunities and Challenges																						
f. <i>Report to Commissioners</i>																						
Step 4. Focus on 2050																						
a. Survey of Values																						
b. Priority Building																						
c. 2050 Community Priority Sessions																						
d. <i>Report to Commissioners</i>																						
Step 5. Action Plan																						
a. Focus Areas																						
b. Action Plan																						
c. <i>Report to Commissioners</i>																						
Step 6. Refine Action Plan																						
a. County Commissioners																						
b. Public Comment																						
c. Planning Board Revisions																						
d. County Commissioners Adoption																						
Step 7. Next Steps (2026-2050)																					S/PB	
a. Monitoring and Reporting																					S/PB	
b. Updating																					S/PB	
c. <i>Annual Report to Commissioners</i>																						

S = Staff
PB = Planning Board
SME=Subject Matter Experts
CC = County Commissioners
P = Public



Transylvania County 2050 Comprehensive Plan

Save the Date & Participate!
**Have a Say in the Future
of your Community!**

Kickoff Events:

June 4th 6PM-8PM: Transylvania County Library, Rogow Room
June 6th 6PM-8PM: Rosman Town Hall

Community Center Events:

June 10th 11AM-1PM: Balsam Grove Community Center
June 11th 11AM-1PM: Cathey's Creek Community Center
June 12th 11AM-1PM: Cedar Mountain Community Center
June 13th 11AM-1PM: Dunn's Rock Community Center
June 17th 11AM-1PM: Little River Community Center
June 18th 1PM-3PM: Quebec Community Center
June 19th 1PM-3PM: See Off Community Center
June 20th 11AM-1PM: Williamson Creek Community Center
June 25th 11AM-1PM: Lake Toxaway Community Center

PROJECT SCHEDULE

Our future starts here!



How can I get involved?

The comprehensive planning process is projected to take just over a year, with opportunities for community input and engagement taking place at various points, through various means and locations, along the way. Both the Planning Board and Board of County Commissioners will hold public hearings and provide additional opportunities for public review, prior to approval and adoption. You are encouraged to follow, attend and engage in the Comprehensive Planning process, by signing up for our email and social media posts by clicking [here](#), or by attending our meetings and events, or spreading the word and engaging your community on the topics that matter. The Transylvania County 2050 Comprehensive Plan is your plan for the future of Transylvania County. Get engaged, stay engaged and help us build a brighter future for all.