



**Town of Davidson
Affordable Housing and Equity Board Regular Meeting
Community Room 120
251 South Street
Thursday, December 19, 2024 at 6:30 PM**

I. CALL TO ORDER

II. WELCOME & INTRODUCTIONS

III. PUBLIC COMMENT

IV. REVIEW/APPROVAL OF MINUTES

a. November 21, 2024, Minutes

Summary: Approve the minutes from the November 21, 2024, affordable housing & equity board regular meeting.

V. OLD BUSINESS

a. October 17, 2024 Minutes

Summary: Approval the minutes from the October 17, 2024, Affordable Housing and Equity Board meeting.

b. Group Agreements

Summary: These are the group agreements the Affordable Housing and Equity Board uses to guide deliberations.

c. Affordable Housing Action Plan

Summary: The Affordable Housing & Equity Board has requested an action plan that demonstrates and shows what actions the Town is taking to address affordability. This action plan is a list of evidence-based best practices, community requests, staff requests, and Town Board requests that could potentially move the needle on affordable housing in Davidson. The plan is structured in line with the four pillars, with buckets related to educating, creating, preserving, and supporting affordable housing. Each action has a priority year and staff lift associated so that staff can prioritize time and resources. Town staff are looking for feedback on the action plan.

VI. NEW BUSINESS

a. Equity Indicators (DRAFT)

Summary:

Equity Indicators are a comprehensive tool that can help the Town understand and measure equality or equity in our work. It works across multiple areas (e.g., education, housing, justice) and measures the disparities faced by disadvantaged groups (those most vulnerable to inequity, such as racial and ethnic minorities, immigrants, or individuals living in poverty) across those domains on a regular basis, tracking change over time.

Equity Indicators tools can be used as frameworks to support policy development, demonstrating the effectiveness of current policies and initiatives, and highlighting areas where new policies and initiatives may be needed. By making data publicly available, they increase transparency and accountability, allowing the local community an inside view into the disparities in their city and where progress is—and is not—being made.

This work was posted as an opportunity for scholars at Davidson College. Quinn Dunlap took on the project and led other scholars to help in the analysis. The work is critical to understanding where we are, and where we are going.

b. Equitable Engagement Framework (DRAFT)

Summary: The Town of Davidson is committed to preserving its unique character and charm while also promoting diverse representation, inclusive and welcoming environments, transparency, and accountability. One way that we ensure that these values are being upheld is through community engagement efforts. In order to serve the community equitably, an equitable framework around engagement is being proposed to guide future endeavors.

This framework is meant to codify best practices in the engagement field into the work of Town operations. The AHEB is being asked to review the draft framework and provide insight and feedback on the framework.

VII. OTHER ITEMS

a. Staff Updates

Summary: MLK Day
January Appointments
January Leadership

VIII. ADJOURNMENT



AGENDA MEMO

To: Davidson Board of Commissioners

From: Alexander Cahill, Affordable Housing & Equity Director

Date: December 19, 2024

Re: November 21, 2024, Minutes

ITEM SUMMARY/OVERVIEW

Approve the minutes from the November 21, 2024, affordable housing & equity board regular meeting.

ACTION/PROPOSED MOTION

Approve the minutes from the November 21, 2024, affordable housing & equity board regular meeting.

RELATED TOWN GOALS

Strategic Plan Alignment

Affordable Living, Equity & Inclusion - Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice. onal, state and federal cooperation.

NEXT STEPS

No additional steps required.



AFFORDABLE HOUSING & EQUITY BOARD

MINUTES

November 21, 2024, 6:30 p.m.

Community Room 120, Town Hall & Community Center
251 South Street, Davidson, NC

I Call to Order

Chair Tisdale called the meeting to order at 6:33pm.

(Technology was down for the evening and the meeting was not recorded)

II Roll Call

Present: Tisdale, Nathan, Graf, Wilson, Roberts, Trovato

Absent: Guernsey, Dnaiel, Sponsel, Wagner, Cheek Absent

*Current appointed membership was 12, making 6 the quorum amount

III Public Comment

There were no public comments made.

IV Approval of the Minutes from September 19, 2024

Approved minutes with an amendment to who closed the September meeting by a vote of 6-0

V Old Business

A. Subcommittee Update

Discussion: The committee would like a better understanding of what the Town Board would like form this group. What advice can they provide? Where should they spend their time? Also a discussion on what their role is (the role is outlined in the bylaws and by both Chair and staff direction). Also discussed finding students to work on synthesizing data. The data would be used to formulate an equity pathway including informing the broader story in Davidson, looking at historical trends, and developing 3-4 pillars of our equity work.

There was a request that the MLK Committee work be more ingrained with the AHEB's wrk.

A. Davidson Planning Ordinance (DPO) Chapter 5 Amendment

Discussion: Excitement about exploring a multifamily option or requirement in the DPO update.

Want a focus on incentives (more density, more height). The board would like a focus on less

punitive approaches and pivot to encouraging housing. The group mentioned Greenville, SC approach as an example to consider.

VI New Business

A. Bylaws

Action: The board voted to recommend an update to the bylaws to change from 13 appointments to 12 appointments. The board recommended approval by a vote of 6-0 (Graf 1st, Wilson 2nd)

Action: The board voted to recommend an update to the bylaws to add a conflict-of-interest clause to the ex-officio section around tenant/property provider relationships. The board recommended approval by a vote of 6-0 (Graf 1st, Roberts 2nd)

Action: The board voted to remove Lake Norman DCD as an ex-officio at the request of Lake Norman CDC Executive Director Michelle HOLverson. The board voted to approve by a vote of 6-0 (Graf 1st, Roberts 2nd)

Action: The board voted to remove Davidson Housing Coalition (DHC) as an ex-officio at the request of sitting board members due to a power dynamic and conflict of interest. The board voted to approve by a vote of 6-0 (Graf 1st, Roberts 2nd)

Action: The board voted to recommended the Town Board appoint Cherese Spand to the vacant seat. The board recommended approval by a vote of 6-0 (Graf 1st, Trovato 2nd)

B. Affordable Housing Action Plan

Discussion: The board presented some ideas on additions to the action plan. The group discussed establishing a google doc to edit in and provide feedback. The discussion centered around actions the board can take between now and the December meeting to make the review happen.

C. Engagement Plan

Discussion: The board voted to continue the item to the December meeting.

VII Other Items

VIII Staff Announcements

Staff reminded AHEB members that the board recognition event is Monday, December 2, at 6:30pm. The event will be held at Hop & Vine.

IX Adjournment



AGENDA MEMO

To: Davidson Board of Commissioners

From: Alexander Cahill, Affordable Housing & Equity Director

Date: December 19, 2024

Re: October 17, 2024 Minutes

ITEM SUMMARY/OVERVIEW

Approval the minutes from the October 17, 2024, Affordable Housing and Equity Board meeting.

ACTION/PROPOSED MOTION

Approve the amended minutes from the October 17, 2024, Affordable Housing and Equity Board meeting.

RELATED TOWN GOALS

Strategic Plan Alignment

Affordable Living, Equity & Inclusion - Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice. rive for local, regional, state and federal cooperation.

NEXT STEPS

No additional steps required



AFFORDABLE HOUSING & EQUITY BOARD

MINUTES

**October 17, 2024, 6:30 p.m.
Community Room 120, Town Hall & Community Center
251 South Street, Davidson, NC**

I Call to Order

Chair Tisdale called the meeting to order at 6:35pm.

II Roll Call

Quorum is not present (NO ACTIONS TAKEN AS QUORUM NOT PRESENT)

III Public Comment

There were no public comments made.

IV Approval of the Minutes from September 19, 2024

UNABLE TO APPROVE DUE TO LACK OF QUORUM

V Old Business

A. Subcommittee Update

Discussion: The affordable housing subcommittee reported on the DPO presentation made by the Planning Director. The committee stated the presentation would come to the full board and we would discuss it in October. The equity subcommittee shared in on their discussion of the Town; s definition of equity, the idea of helping support and operationalize the definition, and asked how the Town Board uses it. The group stated they would use it to: conduct analysis, define the problem and opportunities, and inform restorative justice in the Town's work.

VI New Business

A. Davidson Planning Ordinance (DPO) Chapter 5 Amendment

Discussion: The staff presented on the process of amending Chapter 5 of the DPO. The Board discussed the following in relation to the DPO amendment:

1. Provide multiple options for compliance to developers

2. Increase the PIL fee to make the choice difficult AND
3. The AHEB is ok with PIL contributions and having the Town utilize those funds for affordable housing activities
4. The PIL should be spent more quickly and transparently AND there should be a clear set of rules for how to spend
5. There is concern that 116 units since 2001 is not anywhere near what we need or should be getting...the Board recognizes we may have gotten zero units in that time without the requirement
6. There is concern that the opt-out and conditional zoning pathway is too predicated on people and who is in office
7. We should revisit density as an option (noting the lack of political and community will in that space in the past)
8. There should be a mechanism in the DPO for the 12.5% requirement and PIL number to increase as a corollary
9. 12.5% is not the right number. Research what is the correct number
10. Eliminate the Built Unit Waiver (require what we expect)

Option for developers should actually be the following:

Option 1: DPO required units at X% with NO built unit waiver incentive

Option 2: Payment in Lieu at a rate that doesn't necessarily encourage building units, but allows us to fund other affordable housing activities if the units aren't built

Option 3: A density bonus

The Board also had questions about projections in growth and units. The Board would like to see the last 5 years of permits/units built so that they can extrapolate going forward.

UNABLE TO TAKE ACTION DUE TO A LACK OF QUORUM. ITEM WILL BE ON THE NOVEMBER MEETING

VII Other Items

VIII Staff Announcements

IX Adjournment



AGENDA MEMO

To: Davidson Board of Commissioners

From:

Date: December 19, 2024

Re: Group Agreements

ITEM SUMMARY/OVERVIEW

These are the group agreements the Affordable Housing and Equity Board uses to guide deliberations.

ACTION/PROPOSED MOTION

RELATED TOWN GOALS

rive for local, regional, state and federal cooperation.

NEXT STEPS



AFFORDABLE HOUSING & EQUITY BOARD

GROUP AGREEMENTS

1. Embrace the truth, lived experience and history, and test your assumptions
2. Seek understanding and be curious
3. Create space for others to share
4. Be here, be present, be engaged
5. Honor and accept personal responsibility – be vulnerable and thoughtful
6. Be patient, tolerant, and have grace
7. Embrace tension, be agreeable while working together
8. Utilize the parking lot for tangents



AGENDA MEMO

To: Davidson Board of Commissioners

From: Alexander Cahill, Affordable Housing & Equity Director

Date: December 19, 2024

Re: Affordable Housing Action Plan

ITEM SUMMARY/OVERVIEW

The Affordable Housing & Equity Board has requested an action plan that demonstrates and shows what actions the Town is taking to address affordability. This action plan is a list of evidence-based best practices, community requests, staff requests, and Town Board requests that could potentially move the needle on affordable housing in Davidson. The plan is structured in line with the four pillars, with buckets related to educating, creating, preserving, and supporting affordable housing. Each action has a priority year and staff lift associated so that staff can prioritize time and resources. Town staff are looking for feedback on the action plan.

ACTION/PROPOSED MOTION

Recommend approval of the Affordable Housing Action Plan.

RELATED TOWN GOALS

Strategic Plan Alignment

Affordable Living, Equity & Inclusion - Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice.

Core Values

Davidson's historic mix of people in all income levels and ages is fundamental to our community, so town government will encourage opportunities, services, and infrastructure that allow people of all means to live and work here.

NEXT STEPS

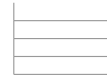
The action plan will go to the Town Board for review.

Educate										
Goals	Strategy (Supply, Subsidy, or Stabilization)	Action Steps	Performance Metric	Priority Score	Begin Implementation Timeline	End Implementation Timeline	Progress to date	Year 1 & 2 Priority	Estimated Town Investment	Basis for Action
Goal E1: Create a marketing and communications plan for affordable housing programs.	Develop educational strategies that support the stability, subsidy, and supply of affordable housing.	Define affordable housing terms and post on Town website.	Terms have been defined and posted on the Town website.	1	May-24	September 2024 (and Ongoing)	Completed	Year 1 Priority	Staff time	Best practice in the academic field of affordable housing.
	Develop educational strategies that support the stability, subsidy, and supply of affordable housing.	Educate the development community on what the DPO requires in terms of affordability through the creation of a developers toolkit.	Number of developers and non-profits that can accurately describe Chapter 5 of the DPO, increases from the baseline.	2	May-25	Jun-25	Not started	Year 1 & 2 Priority	Staff time	Interactions with stakeholders, staff, developers, and community members.
	Develop educational strategies that support the stability, subsidy, and supply of affordable housing.	Develop the fiscal acumen of Town staff around how they can access affordable housing financing, programs, training and exposure.	Number of Town staff that can accurately define affordable housing and accurately describe at least one funding mechanism, increases from the baseline.	2	Oct-24	Ongoing	In Progress	Year 1 Priority	Staff time	Interactions with staff.
	Develop educational strategies that support the stability, subsidy, and supply of affordable housing.	Work with a consortium in North Mecklenburg to develop, brand, and message the benefits of affordable housing.	A campaign has been funded, launched, and the number of community members who state they have more awareness around affordable housing increases.	1	May-24	Ongoing	In Progress	Year 1 & 2 Priority	One-time investment of \$10,000.	Interactions with stakeholders, staff, developers, and community members.
Goal E2: Develop a homebuyer and homeownership education program.	Develop educational strategies that support the stability, subsidy, and supply of affordable housing.	Work with DreamKey to expand their existing counseling program to the Town of Davidson.	The number of community members in Davidson receiving counseling increases from the baseline.	2	Jan-25	Ongoing	Not started	Year 2 Priority	\$3,000 annually for marketing materials, ads, and service provision.	Evidence-based best practice in the field of affordable housing.
Goal E3: Develop a financial literacy program.	Develop educational strategies that support the stability of those living in affordable housing.	Research the development of a wealth-building program for those living in rental housing.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	3	Sep-26	Ongoing	Not started	Year 3 Priority	\$5,000 annually for marketing materials, ads, and service provision.	Evidence-based best practice in the field of affordable housing. Evidence-based best practice in the field of equity work.
Goal E4: Develop a landlord training program.	Develop educational strategies that support the stability, subsidy, and supply of affordable housing.	Encourage landlords to accept Housing Choice Vouchers.	Percentage of landlords with 3 or more units accepting Housing Choice Vouchers.	2	Mar-25	Aug-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Board member request.
	Develop reporting strategies that support the stability, subsidy, and supply of affordable housing.	Consider an ordinance requiring landlords to report tenant, pricing, and unit information annually.	Percentage of landlords with 3 or more units to report annually.	2	Mar-25	Aug-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing.
	Develop reporting strategies that support the stability, subsidy, and supply of affordable housing.	Consider requiring landlords to submit annual reports to the Town on inspections, living conditions, and violation follow-ups.	Percentage of landlords with 3 or more units to report annually.	2	Mar-25	Aug-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing.

Create										
Goals	Strategy (Supply, Subsidy, or Stabilization)	Action Steps	Performance Metric	Priority Score	Begin Implementation Timeline	End Implementation Timeline	Progress to date	Priority	Estimated Investment	Basis for Action
C1: Develop Town-owned land with affordable housing.	Add to the supply of affordable housing by the Town modeling leadership in affordable housing development.	Investigate the feasibility of private development community construct concrete pads with utilities installed and donating/landleasing to Habitat or other housing non-profits.	Number of subdivisions that construct a pad with utilities and donate to Habitat in excess of DPO required units.	2	Mar-25	Jun-25	Not started	Year 2 Priority	Staff time	Best practice from other jurisdictions.
	Add to the supply of affordable housing by the Town modeling leadership in affordable housing development.	Conduct an analysis of publicly-owned land that could support construction of affordable housing.	Completed	1	Jul-22	Jul-24	Completed	Year 1 & 2 Priority	Undetermined at this time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.
C2: Create an incentive program for market-rate and affordable housing developers.	Create additional layers of subsidy through financial instruments.	Encourage and model usage of the 4% and 9% Low Income Housing Tax Credits (LIHTC) Programs.	Number of units funded through LIHTC increases year over year.	1	May-24	Ongoing	In Progress	Year 1 & 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.
	Create additional layers of subsidy through financial instruments.	Investigate partnerships and a program that can provide a competitive affordable housing loan program for market rate, affordable developers and non-profits to apply for and utilize.	Number of loans issued/number of unitsw created from issued loans	3	Feb-26	Jun-26	Not started	Year 3 Priority	Undetermined at this time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing.
	Develop process improvements that support the stability, subsidy, and supply of affordable housing.	Collaborate with the County on exploring the possibility of a process for priority review for projects with an affordable housing component.	The amount a time a project takes from application submittal to certificate of occupancy decreases over time.	2	Mar-25	Aug-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.
	Create additional layers of subsidy through financial instruments.	In conjunction with the County, Investigate the feasibility of reducing or eliminating fees for projects that meet affordability standards as part of the advocacy agenda.	Number of applicants that state reduced fees reduced the cost of their project as passed down to the end user increases	3	Mar-25	Aug-25	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.
	Develop process improvements and instruments that support the stability, subsidy, and supply of affordable housing.	Investigate the use of community benefit agreements/statutory development agreements to incentivize affordable housing in nontraditional projects.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	2	Mar-25	Aug-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.
	Create additional layers of subsidy through financial instruments.	Research and potentially develop a program on the use of municipal housing bonds.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	3	Jun-25	Dec-25	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.
	Create additional layers of subsidy through financial instruments.	Research and potentially develop a program of Synthetic Tax Increment Financing or a Land Use Incentive Grant (LUIG) to financially support affordable housing.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	4	Apr-27	Dec-27	Not started	Year 4 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.
	Create additional layers of subsidy through financial instruments.	Explore methods that ensure increases in property tax increases are invested back into marginalized communities.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	3	Mar-26	Jun-26	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing.

	Create stabilization of the affordable housing inventory through relationship building.	Identify and build strong partnerships with developers who have a mission to provide sustainable affordable housing for a variety of family sizes and types.	Number of developers who build affordable units in Davidson increases. Number of developers who sign an affordable housing values commitment increases.	1	May-24	Ongoing	In Progress	Year 1 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
	Create additional layers of subsidy through financial instruments and create stabilization of the affordable housing inventory.	Advocate and educate landlords on identifying ways to accept alternative forms of credit to secure home loans (i.e. including using on-time payments of rent, utilities and subscription services.), removing credit score requirements, background checks, SSNs, and/or removing credit ratio requirements.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	4	Mar-27	Dec-27	Not started	Year 4 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Interactions with stakeholders, staff, developers, and community members.
C3: Update Chapter 5 of the DPO.	Develop regulatory strategies that support the stability, subsidy, and supply of affordable housing.	Explore revising the DPO to allow for multifamily housing types administratively if certain comprehensive plan policies are met and affordable housing is provided at a set percentage.	Research has been completed and presented to Affordable Housing & Equity Board, Planning Board, and Town Board through an affordable housing work session.	1	Apr-25	Sep-25	In Progress	Year 1 Priority	Staff time	Best practice in the field of Planning. Interactions with stakeholders, staff, developers, and community members.
	Develop regulatory strategies that support the stability, subsidy, and supply of affordable housing.	Revise the DPO to clean up and strengthen language in Chapter 5 to encourage more affordable units.	Research has been completed and presented to Affordable Housing & Equity Board, Planning Board, and Town Board through an affordable housing work session.	1	Jan-24	Feb-25	In Progress	Year 1 Priority	Staff time	Interactions with stakeholders, staff, developers, and community members.
	Develop regulatory strategies that support the stability, subsidy, and supply of affordable housing.	Explore eliminating parking minimums.	Research has been completed and presented to Affordable Housing & Equity Board, Planning Board, and Town Board through an affordable housing work session.	3	Jan-26	Aug-26	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice in the field of Planning.
	Develop regulatory strategies that support the stability, subsidy, and supply of affordable housing.	Explore removing all density limitations created by limitations in allowable structure types.	Research has been completed and presented to Affordable Housing & Equity Board, Planning Board, and Town Board through an affordable housing work session.	3	Jan-26	Aug-26	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice in the field of Planning.
C4: Develop a land acquisition and land banking program.	Develop evidence-based policies that support the stability, subsidy, and supply of affordable housing.	Research options for encouraging the inclusion of units to accommodate affordability in rehabilitated multifamily housing developments anytime a multifamily property is up for sale.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	3	Jun-26	Dec-26	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice in the field of Planning.
	Develop evidence-based policies that support the stability, subsidy, and supply of affordable housing.	Explore the benefits of establishing or supporting a Community Land Trust.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	2	Mar-26	Jul-26	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Interactions with stakeholders, staff, developers, and community members.
	Create and maintain the supply of the affordable housing inventory through land acquisition.	Investigate the feasibility of a land-banking, land acquisition, and land donation program for the potential development of affordable housing. Encourage land donation by dedicated residents, businesses, and other Town partners, including planned gifts.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	2	May-26	Nov-26	Not started	Year 2 Priority	Undetermined at this time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Interactions with stakeholders, staff, developers, and community members.
	Create and maintain the supply of the affordable housing inventory through home acquisition.	Utilize the County Tax Administrator website to monitor foreclosures and identify homes that can be protected or added to the affordable housing inventory.		3	May-26	Nov-26	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Interactions with stakeholders, staff, developers, and community members. Best practice in the field of Planning.

C5: Increase supply	Develop evidence-based policies that support the stability, subsidy, and supply of affordable housing.	Investigate allowing all building structures in all or most zoning districts.	Number of ADUs increases from baseline year.	3	Feb-26	Aug-26	Not started	Year 3 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Interactions with stakeholders, staff, developers, and community members. Best practice in the field of Planning.
	Develop evidence-based policies that support the stability, subsidy, and supply of affordable housing.	Research how to incentivize and encourage mixed-income and intergenerational housing.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	2	May-26	Sep-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Interactions with stakeholders, staff, developers, and community members. Best practice in the field of Planning.
C5: Develop a rental subsidy program.	Create additional layers of subsidy through financial assistance.	Develop a rental subsidy pilot program with Ada Jenkins Center.	A rental subsidy program gets funds to 22 DHC tenants.	1	May-23	Dec-24	In Progress	Year 1 Priority	\$162,000 per year	Interactions with stakeholders, staff, developers, and community members.
	Create additional layers of subsidy through financial assistance.	Develop a scalable tenant-based rental assistance program across affordable units in Town.	Number of tenants receiving assistance increases. Number of tenants paying more than 30% of their income towards rent and utilities decreases.	1	Sep-24	Ongoing	In Progress	Year 1 Priority	\$307,000 per year	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Interactions with stakeholders, staff, developers, and community members.



Preserve										
Goals	Strategy (Supply, Subsidy, or Stabilization)	Action Steps	Performance Metric	Priority Score	Begin Implementation Timeline	End Implementation Timeline	Progress to date	Year 1 & 2 Priority	Estimated Town Investment	Basis for Action
Goal P1: Develop an essential home improvement program.	Create stabilization of the affordable housing inventory through programs that help keep residents in their homes.	Explore updating the essential home improvement program based on what has worked, what hasn't worked, what the community needs, and funding sources.	An updated procedure includes this as part of the scope of work.	1	May-24	Oct-24	Completed	Year 1 & 2 Priority	\$250,000 annually for marketing, vendor work, administration, and materials (for 5 homes)	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
	Create stabilization of the affordable housing inventory through programs that help keep residents in their homes.	Research developing a set of examples of cost-effective, sustainable, green, energy efficient, and high-quality standards that are followed to be used within the essential home improvement program.	An updated procedure includes this as part of the scope of work.	1			Not started	Year 1 & 2 Priority	One time cost of \$10,000 for marketing and plans.	Best practice in the field of sustainability. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
	Create stabilization of the affordable housing inventory through programs that help keep residents in their homes.	Develop a standard to inspect trees and landscaping in every essential home improvement project.	An updated procedure includes this as part of the scope of work.	1	May-24	Aug-24	Completed	Year 1 & 2 Priority	Staff time	Best practice in the field of sustainability. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
Goal P2: Develop an urgent home repair program.	Create stabilization of the affordable housing inventory through programs that help keep residents in their homes.	Develop an urgent home repair program that meets the community need, utilizes a HUB-certified vendor, and is available 24-hours, 7-days per week.	A program is adopted by the Town Board and is monitored over time.	1	May-24	Sep-24	Completed	Year 1 & 2 Priority	\$50,000 annually for marketing, vendor work, administration, and materials (for 33 homes)	Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
Goal P3: Develop an enforcement and administration program.	Create and maintain the supply of the affordable housing inventory through programs that keep homes affordable.	Develop a program for the enforcement of deed restrictions associated with the DPO required affordable housing inventory.	A procedure is established, a schedule of annual certifications is tracked, and a process to manage the 30-year deed restriction update requirement is developed.	2	May-25	Aug-25	Not started	Year 2 Priority	Staff time	Evidence-based best practice in the field of affordable housing. Alignment with state law. Interactions with stakeholders, staff, developers, and community members.
Goal P4: Review and improve the regulatory environment.	Create and maintain the supply of the affordable housing inventory through programs that keep homes affordable.	Partner with Centralina on a grant-funded program through HUD PRO that explores the following: anti-displacement mechanisms, microunits and ADUs, protection from investors, and the regulation of in-home rentals.		2	Apr-25	Apr-26	In Progress	Year 1 & 2 Priority	Staff time	???
Goal P5: Develop an program that leverages historic preservation efforts.	Create and maintain the supply of the affordable housing inventory through historic preservation programs that keep homes affordable.	Consider developing a program that preserves homes built before 1970, focusing on shotgun, mill, rohouses, and bungalows.		3	Jun-25	Oct-25	Not started	Year 3 Priority	Staff time	Research-based best practice in the historic preservation and affordable housing field.
	Create and maintain the supply of the affordable housing inventory through historic preservation programs that keep homes affordable.	Explore adopting a deconstruction ordinance.		2	Feb-25	Jul-25	Not started	Year 2 Priority	Staff time	Research-based best practice in the historic preservation and affordable housing field.
	Create and maintain the supply of the affordable housing inventory through historic preservation programs that keep homes affordable.	Explore the legal framework around a first right of refusal ordinance for any home constructed prior to 1970.		4	Sep-26	Jan-27	Not started	Year 4 Priority	Staff time/Undetermined Acquisition Costs	Research-based best practice in the historic preservation and affordable housing field.
	Create and maintain the supply of the affordable housing inventory through historic preservation programs that keep homes affordable.	Explore the possibility of an affordable housing overlay for the Lakeside neighborhood.		2	Mar-25	Aug-25	Not started	Year 2 Priority	Staff time	Research-based best practice in the historic preservation and affordable housing field.

Support

Goals	Strategy (Supply, Subsidy, or Stabilization)	Action Steps	Performance Metric	Priority Score	Begin Implementation Timeline	End Implementation Timeline	Progress to date	Year 1 & 2 Priority	Estimated Town Investment	Basis for Action
Goal S1: Develop a Down Payment Assistance Program.	Create additional layers of subsidy through financial assistance.	Implement a down payment program through DreamKey Partners.	The number of individuals utilizing down payment assistance increases from the baseline of zero in 2023.	1	May-24	Oct-24	In Progress	Year 1 & 2 Priority	\$90,000 annually for marketing, vendor work, administration, and materials (for 9 households)	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
S2: Assess staffing and capacity.	Develop process improvements that support the stability, subsidy, and supply of affordable housing.	Develop an affordable housing action plan that helps establish a baseline of actions and indicators to measure and track progress.	An action plan is implemented and a corresponding tracking system is established and utilized by all affordable housing department staff.	1	May-24	Jul-24	Completed	Year 1 & 2 Priority	Staff time	Lived experience
	Develop process improvements that support the stability, subsidy, and supply of affordable housing.	Identify and leverage stakeholders that can help build department capacity.	Each program has a Town employee assigned to lead or has an organization with a formal contract assigned to manage the program.	1	May-24	Ongoing	In Progress	Year 1 and Ongoing	Staff time/Undetermined at this time	Best practice from other jurisdictions. Town staff request.
S3: Develop partnerships with affordable housing key players.	Create stabilization of the affordable housing inventory through relationship building.	Explore and define how we work with affordable housing stakeholders, create co-accountability, delineate roles and scope, and cement our understanding of the legal framework.	A definition of the role and what support looks like has been agreed upon and formalized by the respective entities.	1	May-24	Ongoing	In Progress	Year 1 and Ongoing	Staff time	Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
	Create stabilization of the affordable housing inventory through relationship building.	Identify and help support local affordable housing developers from the Black, Indigenous, and Person of Color (BIPOC) community.	The number of developers from the local and BIPOC communities increases from the baseline.	3	Jun-26	Dec-26	Not started	Year 3 Priority	Staff time	Lived experience. Interactions with stakeholders, staff, developers, and community members.
S4: Identify sources of recurring funding.	Create additional layers of subsidy through financial assistance.	Research formalizing a living wage policy.	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	3	Feb-26	Jun-26	Not started	Year 3 Priority	Staff time/Undetermined at this time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
	Create additional layers of subsidy through financial assistance.	Research establishing an endowment for affordable housing. (to fund HOA fees? Maintaining)	Research has been conducted, displayed in a report, and captures the pros, cons, and financial implications of using this method.	3	Jan-26	Apr-26	Not started	Year 3 Priority	Staff time	Give Impact may be able to scope this out and perform the research earlier than these anticipated dates.
	Create additional layers of subsidy through financial assistance.	Seek and apply for grant opportunities that would provide funds for property acquisition.	At least one grant is applied for and awarded each fiscal year.	1	May-24	Ongoing	In Progress	Year 1 and Ongoing	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
	Create additional layers of subsidy through financial assistance.	Adopt a 1 cent property tax dedicated to affordable housing.	A recurring property tax was approved.	1	Apr-23	Ongoing	Completed	Year 1 Priority	Staff time	Interactions with stakeholders, staff, developers, and community members.
	Create additional layers of subsidy through financial assistance.	Explore incentives such as density bonuses, expedited approvals, fee waivers, and other subsidies that voluntary programs offer developers for building affordable units. (work with County)	The number of units increases as a positive correlation with incentives.	2	Jun-25	Oct-25	Not started	Year 2 Priority	Staff time/Undetermined at this time	Best practice in the affordable housing field. Input received from the development community.

S5: Supportive Housing	Create stabilization of the affordable housing inventory through tenant protections.	Explore options for a rental eviction mitigation, foreclosure prevention, and diversion program.	A program is adopted by the Town Board. The number of evictions is reduced from the baseline and continues to approach zero.	2	Apr-25	Aug-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
	Create stabilization in affordable housing through social programmatic design.	Document efforts supporting Town of Davidson housing options.	A procedure has been established and is being monitored for disparate impacts.	1	Aug-24	Oct-24	Completed	Year 1 Priority	Staff time/Resources to pay a property provider	Town Board request around employee workforce housing. Town employee request.
	Create stabilization in affordable housing through social programmatic design.	Develop a preference procedure for housing selection that includes monitoring and tracking for disparate impacts.	A procedure has been established and is being monitored for disparate impacts.	1	Jul-24	Oct-24	Completed	Year 1 Priority	Staff time	Town Board request. Best practice in equity and affordable housing. Community request.
	Create stabilization in affordable housing through social programmatic design.	Explore working with the County on a Housing First Program or work with Mecklenburg County on strengthening a partnership around one. (Housing First is a homeless assistance approach that prioritizes providing permanent housing to people experiencing homelessness, thus ending their homelessness and serving as a platform from which they can pursue personal goals and improve their quality of life.)	A program is adopted by the Town Board.	2	Jun-25	Sep-25	Not started	Year 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions. Interactions with stakeholders, staff, developers, and community members.
S6: Process Innovation	Develop process improvements that support the stability, subsidy, and supply of affordable housing.	Establish programmatic oversight of financial monitoring that includes identifying existing grants and fund balances and ways to grow the balances for future use.	The fund balances have been portrayed on the dashboard. The funds continue to grow overtime (unless they are drawn upon).	1	May-24	Ongoing	In Progress	Year 1 & 2 Priority	Staff time	Best practice in the academic field of affordable housing. Evidence-based best practice in the field of affordable housing. Best practice from other jurisdictions.

Overall Metric

Goals	Baseline
Number of affordable rental units in the Town's inventory increases over time.	2024 data shows 5 units in Town's rental inventory.
Number of affordable rental units located within the Town of Davidson Town limits increases over time.	2024 data shows X affordable rental homes within the Town limits.
Number of affordable for-sale units located within the Town of Davidson increases over time.	2024 data shows 142 affordable for-sale homes within the Town limits.
Number of Davidson residents stating they pay more than 30% of their income on rent/mortgage and utilities decreases over time.	No existing data.
Number of residents who say they can afford to live in Davidson increases over time.	No existing data.
Number of Town employees who say they can afford to live in Davidson increases over time.	2024 data shows that 1 in 33 full-time Town of Davidson employees states they can afford to live in Davidson.

Comprehensive Plan Metrics

5.2.1.A	<p>Quantity of Affordable Housing Stock - Total <i>This metric describes the total amount of affordable housing units.</i></p>
5.2.1.B	<p>Quantity of Affordable Housing Stock - Income Level Served (% of AMI) <i>This metric describes the amount of affordable housing units by income.</i></p>
5.2.1.C	<p>Quantity of Affordable Housing Stock - Affordability Status (Temporary or Permanent) <i>This metric describes the proportion of affordable units based on occupancy.</i></p>

5.2.1.D	<p>Quantity of Affordable Housing Stock - Tenure type (Owner-occupied or Rental) <i>This metric describes the number of affordable units occupied by owners and renters.</i></p>
5.2.1.E	<p>Quantity of Affordable Housing Stock - Tenant Demographics <i>This metric describes the demographic composition of affordable unit tenants.</i></p>
5.2.2	<p>Quality of Affordable Housing Stock <i>This metric describes the proportion of affordable units in need of immediate or emergency repairs, short-term repairs (1-3 years), and long-term repairs or renovations (3-5 years).</i></p>
5.2.3.A	<p>Accessibility of Affordable Housing Stock - Proximity to Employment Centers <i>This metric describes the proportion of affordable units accessible to employment centers via a safe, continuous pedestrian route (< 1 mile).</i></p>
5.2.3.B	<p>Accessibility of Affordable Housing Stock - Proximity to High-Frequency Transit <i>This metric describes the proportion of affordable units accessible to high-frequency transit via a safe, continuous pedestrian route (< 0.5 mile).</i></p>
5.2.3.C	<p>Accessibility of Affordable Housing Stock - Proximity to Schools <i>This metric describes the proportion of affordable units accessible to pre- and K-8 education facilities via a safe, continuous pedestrian route (< 1 mile).</i></p>

5.2.3.D	<p>Accessibility of Affordable Housing Stock - Proximity to Parks or Greenways</p> <p><i>This metric describes the proportion of affordable units accessible to park and greenway facilities via a safe, continuous pedestrian route (< 0.5 mile).</i></p>
5.2.3.E	<p>Accessibility of Affordable Housing Stock - Proximity to Grocery Stores</p> <p><i>This metric describes the proportion of affordable units accessible to a grocery store via a safe, continuous pedestrian route (< 0.25 mile).</i></p>
5.2.3.F	<p>Accessibility of Affordable Housing Stock - Proximity to Amenities (Healthcare/Commercial Centers)</p> <p><i>This metric describes the proportion of affordable units accessible to primary care healthcare and commercial services via a safe, continuous pedestrian route (< 0.25 mile).</i></p>

S

Intended Outcome

Increase from the baseline of 1 in 33. Continue to approach 100% of Town employees stating they can afford to live in Davidson.

116
See Exhibit HE-1
0%

Owner - 77
Rental - 8

XX%

XX%

XX%

XX%

XX%

XX%

XX%

XX%

ACTION	Year		
		Jan	Feb
Educate			
Define affordable housing terms to build a shared understanding.	Year 1 Priority		
Educate the development community on what the DPO requires in terms of affordability through the creation of a developers toolkit.	Year 1 & 2 Priority		
Develop the fiscal acumen of Town staff around how they can access affordable housing financing, programs, training and exposure.	Year 1 Priority		
Work with a consortium in North Mecklenburg to develop, brand, and message the benefits of affordable housing.	Year 1 & 2 Priority		
Work with DreamKey Partners to expand their existing counseling program to the Town of Davidson.	Year 2 Priority		
Research a wealth-building program for those living in rental housing.	Year 3 Priority		
Encourage landlords to accept Housing Choice Vouchers.	Year 2 Priority		
Consider an ordinance requiring landlords to report tenant, pricing, and unit information annually.	Year 2 Priority		
Consider requiring landlords to submit annual reports to the Town on inspections, living conditions, and violation follow-ups.	Year 2 Priority		
Create			
Investigate the feasibility of private development community construct concrete pads with utilities installed and donating/landleasing to Habitat or other housing non-profits.	Year 2 Priority		
Conduct an analysis of publicly-owned land that could support construction of affordable housing.	Year 1 & 2 Priority		
Encourage and model usage of the 4% and 9% Low Income Housing Tax Credits (LIHTC) Programs.	Year 1 & 2 Priority		

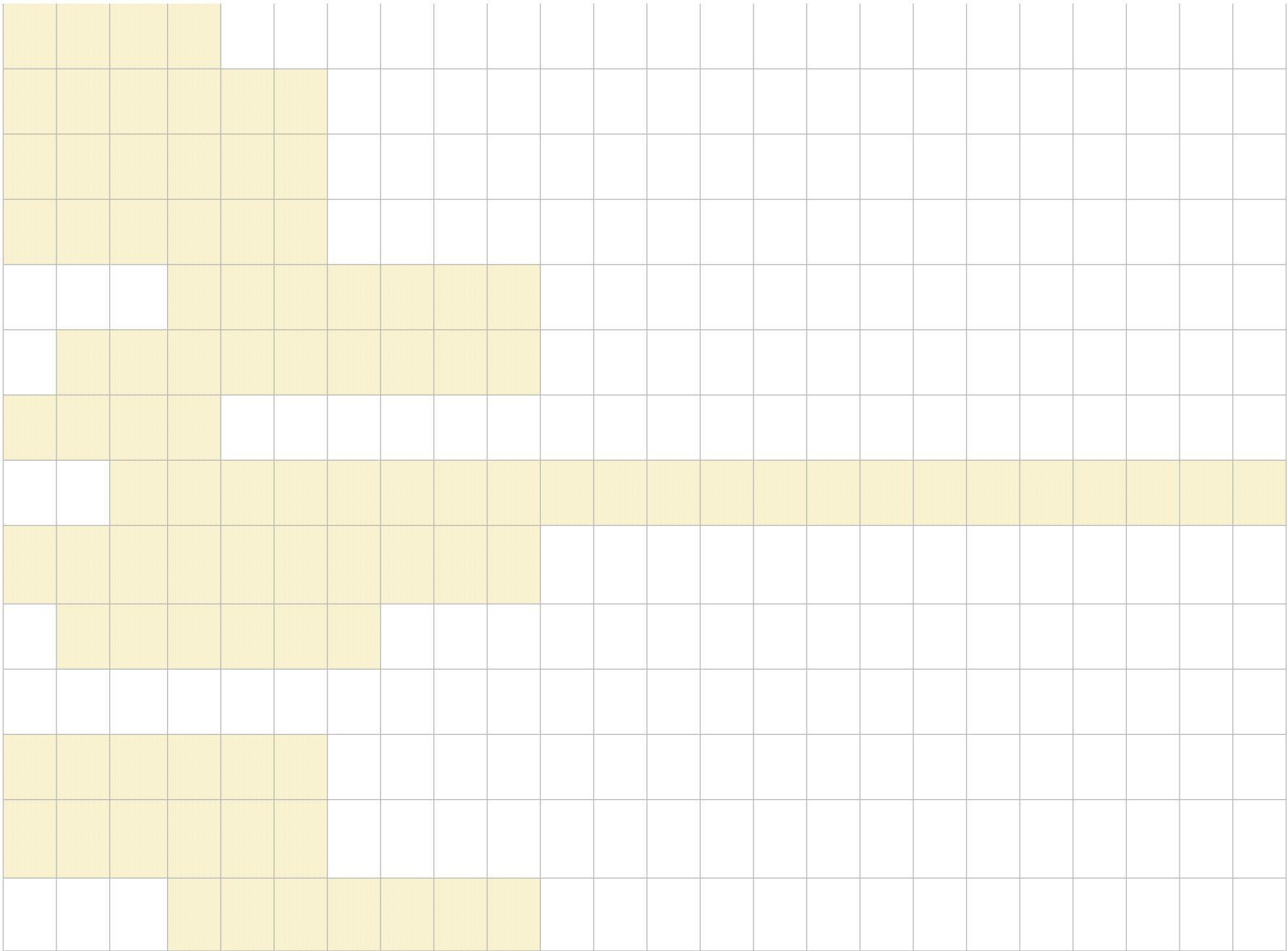
Investigate partnerships and a program that can provide a competitive affordable housing loan program for market rate, affordable developers and non-profits to apply for and utilize.	Year 3 Priority		
Collaborate with the County on exploring the possibility of a process for priority review for projects with an affordable housing component.	Year 2 Priority		
In conjunction with the County, Investigate the feasibility of reducing or eliminating fees for projects that meet affordability standards as part of the advocacy agenda.	Year 3 Priority		
Investigate the use of community benefit agreements/statutory development agreements to incentivize affordable housing in nontraditional projects.	Year 2 Priority		
Research and potentially develop a program on the use of municipal housing bonds.	Year 3 Priority		
Research and potentially develop a program of Synthetic Tax Increment Financing or a Land Use Incentive Grant (LUIG) to financially support affordable housing.	Year 4 Priority		
Explore methods that ensure increases in property tax increases are invested back into marginalized communities.	Year 3 Priority		
Identify and build strong partnerships with developers who have a mission to provide sustainable affordable housing for a variety of family sizes and types.	Year 1 Priority		
Advocate and educate landlords on identifying ways to accept alternative forms of credit to secure home loans (i.e. including using on-time payments of rent, utilities and subscription services.), removing credit score requirements, background checks, SSNs, and/or removing credit ratio requirements.	Year 4 Priority		
Explore revising the DPO to allow for multifamily housing types administratively if certain comprehensive plan policies are met and affordable housing is provided at a set percentage.	Year 1 & 2 Priority		
Revise the DPO to clean up and strengthen language in Chapter 5 to encourage more affordable units.	Year 1 Priority		
Explore eliminating parking minimums.	Year 3 Priority		
Explore removing all density limitations created by limitations in allowable structure types.	Year 3 Priority		
Research options for encouraging the inclusion of units to accommodate affordability in rehabilitated multifamily housing developments anytime a multifamily property is up for sale.	Year 3 Priority		

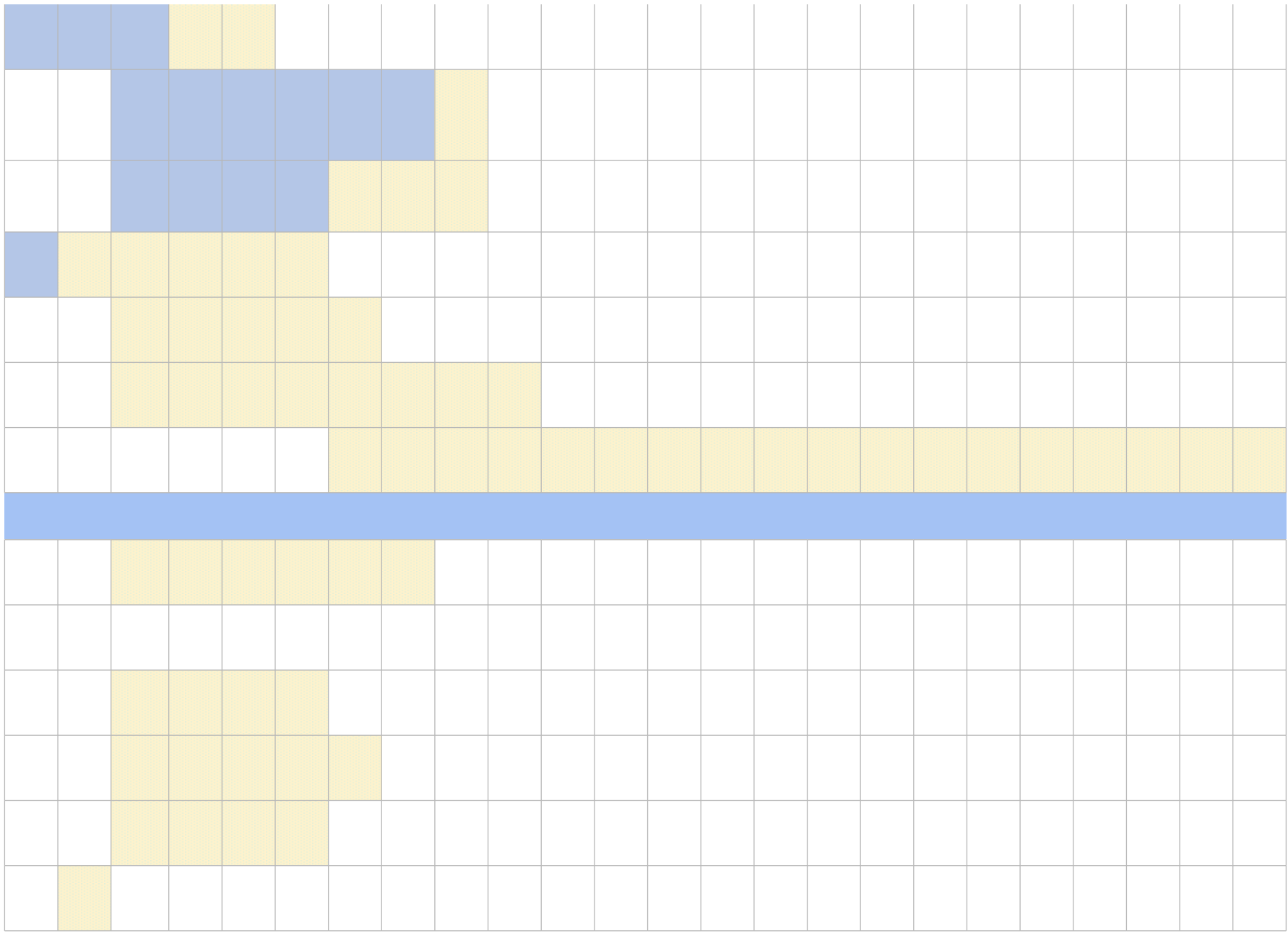
Explore the benefits of establishing or supporting a Community Land Trust.	Year 2 Priority		
Investigate the feasibility of a land-banking, land acquisition, and land donation program for the potential development of affordable housing. Encourage land donation by dedicated residents, businesses, and other Town partners, including planned gifts.	Year 2 Priority		
Utilize the County Tax Administrator website to monitor foreclosures and identify homes that can be protected or added to the affordable housing inventory.	Year 3 Priority		
Investigate allowing all building structures in all or most zoning districts.	Year 3 Priority		
Research how to incentivize and encourage mixed-income and intergenerational housing.	Year 2 Priority		
Develop a rental subsidy pilot program with Ada Jenkins Center.	Year 1 Priority		
Develop a scalable tenant-based rental assistance program across affordable units in Town.	Year 1 & 2 Priority		
Preserve			
Explore updating the essential home improvement program based on what has worked, what hasn't worked, what the community needs, and funding sources.	Year 1 & 2 Priority		
Research developing a set of examples of cost-effective, sustainable, green, energy efficient, and high-quality standards that are followed to be used within the essential home improvement program.	Year 1 & 2 Priority		
Develop a standard to inspect trees and landscaping in every essential home improvement project.	Year 1 & 2 Priority		
Develop an urgent home repair program that meets the community need, utilizes a HUB-certified vendor, and is available 24-hours, 7-days per week.	Year 1 & 2 Priority		
Develop a program for the enforcement of deed restrictions associated with the DPO required affordable housing inventory.	Year 2 Priority		
Partner with Centralina on a grant-funded program through HUD PRO that explores the following: anti-displacement mechanisms, microunits and ADUs, protection from investors, and the regulation of in-home rentals.	Year 1 & 2 Priority		

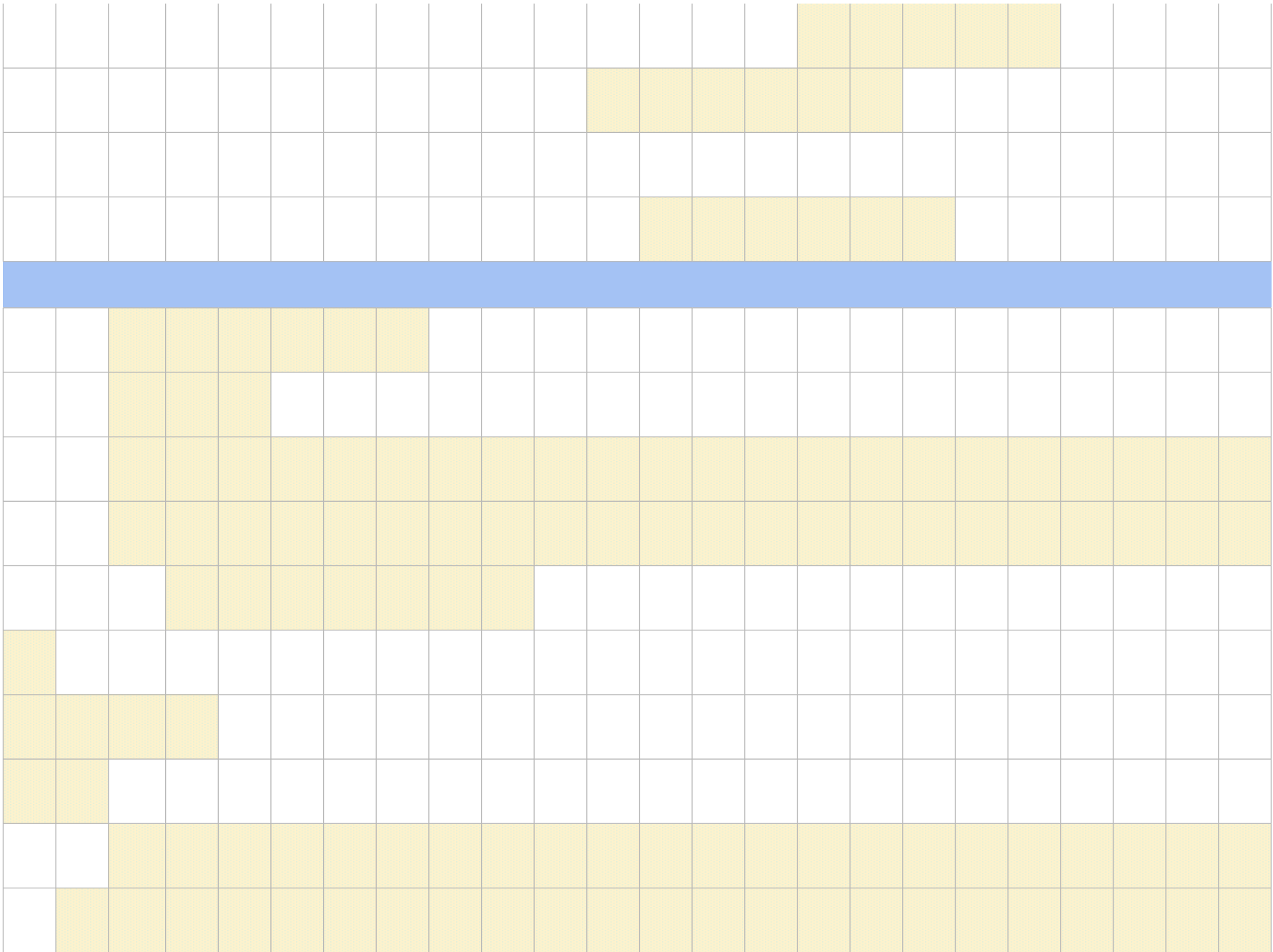
Consider developing a program that preserves homes built before 1970, focusing on shotgun, mill, rowhouses, and bungalows.	Year 3 Priority		
Explore adopting a deconstruction ordinance.	Year 2 Priority		
Explore the legal framework around a first right of refusal ordinance for any home constructed prior to 1970.	Year 4 Priority		
Explore the possibility of an affordable housing overlay for the Lakeside neighborhood.	Year 2 Priority		
Support			
Implement a down payment program through DreamKey Partners.	Year 1 & 2 Priority		
Develop an affordable housing action plan that helps establishes a baseline of actions and indicators to measure and track progress.	Year 1 & 2 Priority		
Identify and leverage stakeholders that can help build department capacity.	Year 1 and Ongoing		
Explore and define how we work with affordable housing stakeholders, create co-accountability, delineate roles and scope, and cement our understanding of the legal framework.	Year 1 and Ongoing		
Identify and help support local affordable housing developers from the Black, Indigenous, and Person of Color (BIPOC) community.	Year 3 Priority		
Research establishing a Guaranteed Income Program	Year 4 Priority		
Research formalizing a living wage policy.	Year 3 Priority		
Research establishing an endowment for affordable housing.	Year 3 Priority		
Seek and apply for grant opportunities that would provide funds for property acquisition.	Year 1 and Ongoing		
Adopt a 1 cent property tax dedicated to affordable housing.	Year 1 Priority		

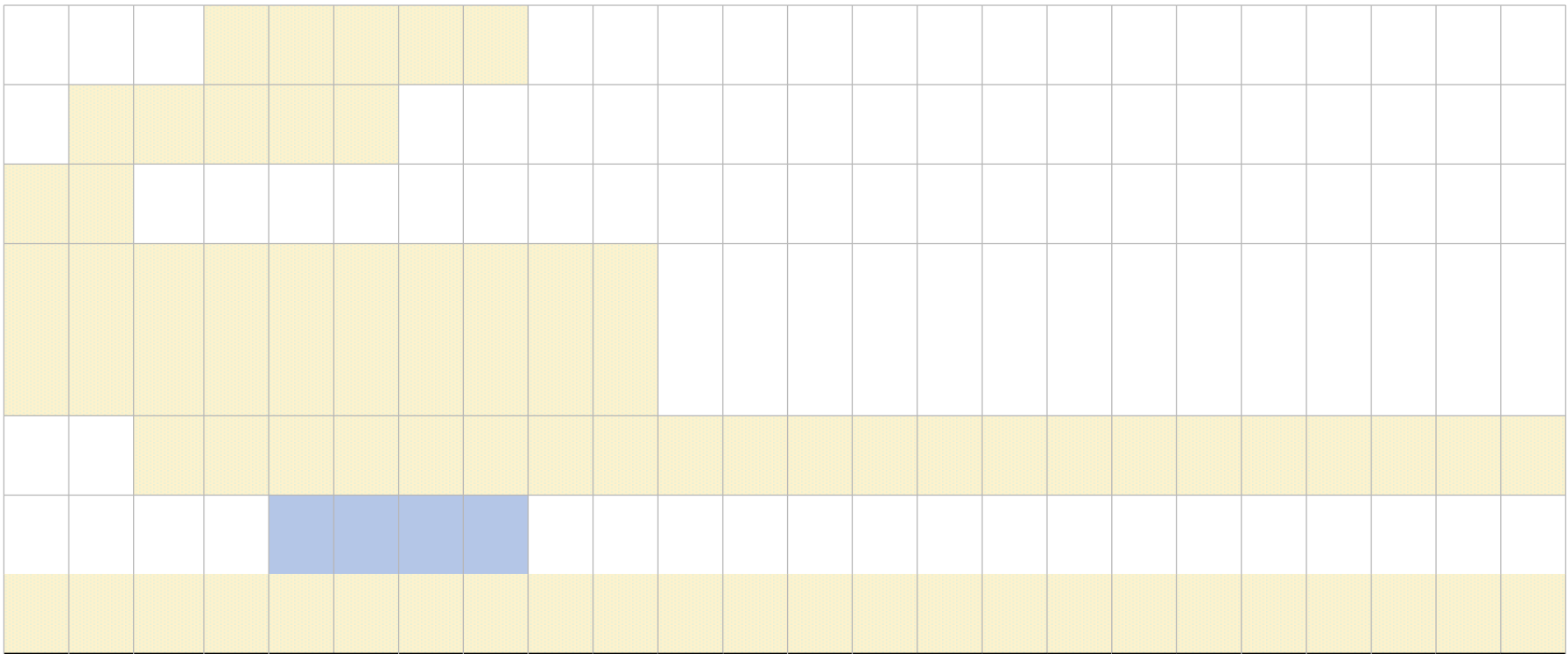
Explore voluntary incentives such as density bonuses, expedited approvals, fee waivers, and other subsidies that voluntary programs offer developers for building affordable units.	Year 2 Priority		
Explore options for a rental eviction mitigation, foreclosure prevention, and diversion program.	Year 2 Priority		
Explore designing projects as trauma-informed and resilient communities.	Year 4 Priority		
Explore working with the County on a Housing First Program or work with Mecklenburg County on strengthening a partnership around one. (Housing First is a homeless assistance approach that prioritizes providing permanent housing to people experiencing homelessness, thus ending their homelessness and serving as a platform from which they can pursue personal goals and improve their quality of life.)	Year 2 Priority		
Establish programmatic oversight of financial monitoring that includes identifying existing grants and fund balances and ways to grow the balances for future use.	Year 1 & 2 Priority		
Develop a preference procedure for housing selection that includes monitoring and tracking for disparate impacts.	Year 1 Priority		

2024										2025													
Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb









2026										2027											
Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

AFFORDABLE HOUSING STRATEGIC FRAMEWORK

Educate

Marketing &
Communications
Plan

Homebuyer &
Homeownership
Education

Financial Literacy



Create

Town-owned Land
Evaluation &
Development

Developer
Incentives

Housing
Ordinance

Land Acquisition

Rental Subsidy
Program

Preserve

Essential Home
Improvement

Urgent Home
Repair

Enforcement &
Administration
(Ongoing
Maintenance)

Support

Down Payment
Assistance

Staffing &
Capacity

Partnerships

Recurring
Funding



AGENDA MEMO

To: Davidson Board of Commissioners

From: Alexander Cahill, Affordable Housing & Equity Director

Date: December 19, 2024

Re: Equity Indicators Research Presentation

ITEM SUMMARY/OVERVIEW

Equity Indicators are a comprehensive tool that can help the Town understand and measure equality or equity in our work. It works across multiple areas (e.g., education, housing, justice) and measures the disparities faced by disadvantaged groups (those most vulnerable to inequity, such as racial and ethnic minorities, immigrants, or individuals living in poverty) across those domains on a regular basis, tracking change over time.

Equity indicators can be used as frameworks to support policy development, demonstrating the effectiveness of current policies and initiatives, and highlighting areas where new policies and initiatives may be needed. By making data publicly available, they increase transparency and accountability, allowing the local community an inside view into the disparities in their city and where progress is—and is not—being made.

This work was posted as an opportunity for scholars at Davidson College. Quinn Dunlap took on the project and led other scholars, including Parker Nunn, to help in the analysis and research. The scholars were provided little framework to follow, and were instead directed to follow where their research took them. The work is critical to understanding where we are, and where we are going.

ACTION/PROPOSED MOTION

For discussion only

RELATED TOWN GOALS

Strategic Plan Alignment

Affordable Living, Equity & Inclusion - Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice.

Operational Excellence - Provide efficient and high-quality public services and facilities through thoughtful and proactive planning, responsible stewardship of Town resources and a professional and committed workforce.

Core Values

Davidson’s historic mix of people in all income levels and ages is fundamental to our community, so town government will encourage opportunities, services, and infrastructure that allow people of all means to live and work here.

NEXT STEPS

The affordable housing & equity board will and should use this information to inform their external equity work.



Equity Indicators: A Tool for the Town of Davidson's Public Policy

Quinn Dunlap '25 and Parker Nunn '26

Absence

- Parker Nunn is absent with pneumonia
- Today, I will be presenting my findings
 - When Parker feels better, he will present his findings individually

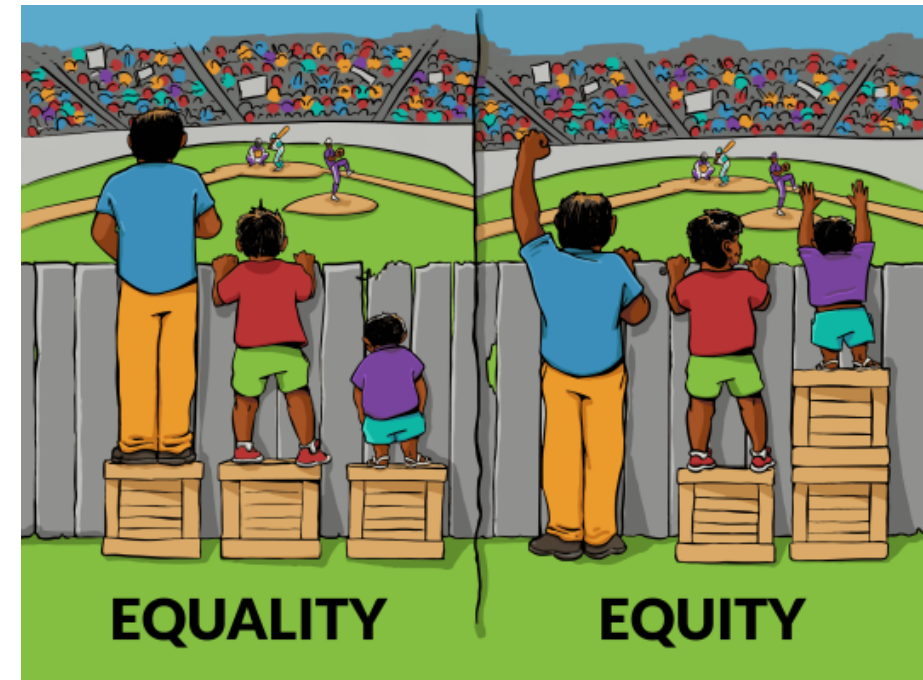
About me

- Quinn Dunlap (Davidson College '25)
 - Political Science and Hispanic Studies double major
 - Bonner Scholar (how I got this position)
 - Just graduated!
 - Interested in a research career
 - A phenomenal, first research opportunity



A launchpad for future researchers

- Only recommendation:
 - Work with Davidson College Bonner Scholars to continue “Equity Indicators” project OR
 - Establish a permanent research position/Equity Department for “Equity Indicators” Report
 - Let new employee make policy recommendations



The Model

ABC Our America Equity Report
(2019)



EQUITY REPORT

CHARLOTTE

← CHANGE CITY

PRINT REPORT

OVERVIEW

HOUSING

HEALTH

EDUCATION

POLICING

ENVIRONMENT

INEQUITIES FOUND IN

19

OF 20 MEASURES STUDIED

i THAT'S MORE THAN IN 80% OF 100 METRO AREAS

The Charlotte metro area includes Anson, Cabarrus, Gaston, Iredell, Lincoln, Mecklenburg, Rowan and Union counties in NC and Chester, Lancaster and York counties in SC.

HOW WE MEASURED EQUITY →

The **Equity Report** measures where your city stands on 20 different measures, across five quality-of-life categories: **Housing, Health, Education, Policing and Environment**. Explore your city's data across each category to learn how social inequities impact the everyday lives of people where you live.

Red dots indicate the areas where we found inequities for at least one racial or ethnic group.

Areas Measured pt. 1

- Housing:

- Segregation
- Segregation of Home Loans
- Home Loan Approvals
- Household Income
- Home Ownership

- Health:

- Access to Health Insurance
- Life Expectancy
- Access to Affordable, Healthy Food

- Education:

- School Days Missed to Discipline
- Schools with Unequal Discipline
- Advanced Courses
- Digital Tools at Home

Areas Measured pt. 2

- Policing:

- Arrests
- Drug Enforcement
- Diversity of Police Forces

- Environment:

- Cancer Risk from Air Pollution
- Respiratory Risk from Air Pollution
- Living Near Water Pollution
- Lead Poisoning Exposure
- Living Near Hazardous Facilities

Disclaimer:

- While a total score of 20 is the worst possible score, most scores in the ABC Equity Report were 15-20.
- Our score is ***flipped***. ABC's scoring didn't make sense.
 - **For Our Report: the closer to 20, the *more* equitable.**
- The Town of Davidson, all things considered, is doing well!
 - But we still have suggestions.
- We do not yet have a score.
 - Lots more research to be done!

My work:

- Housing (1/5)
- Policing (3/3)

Parker's Work

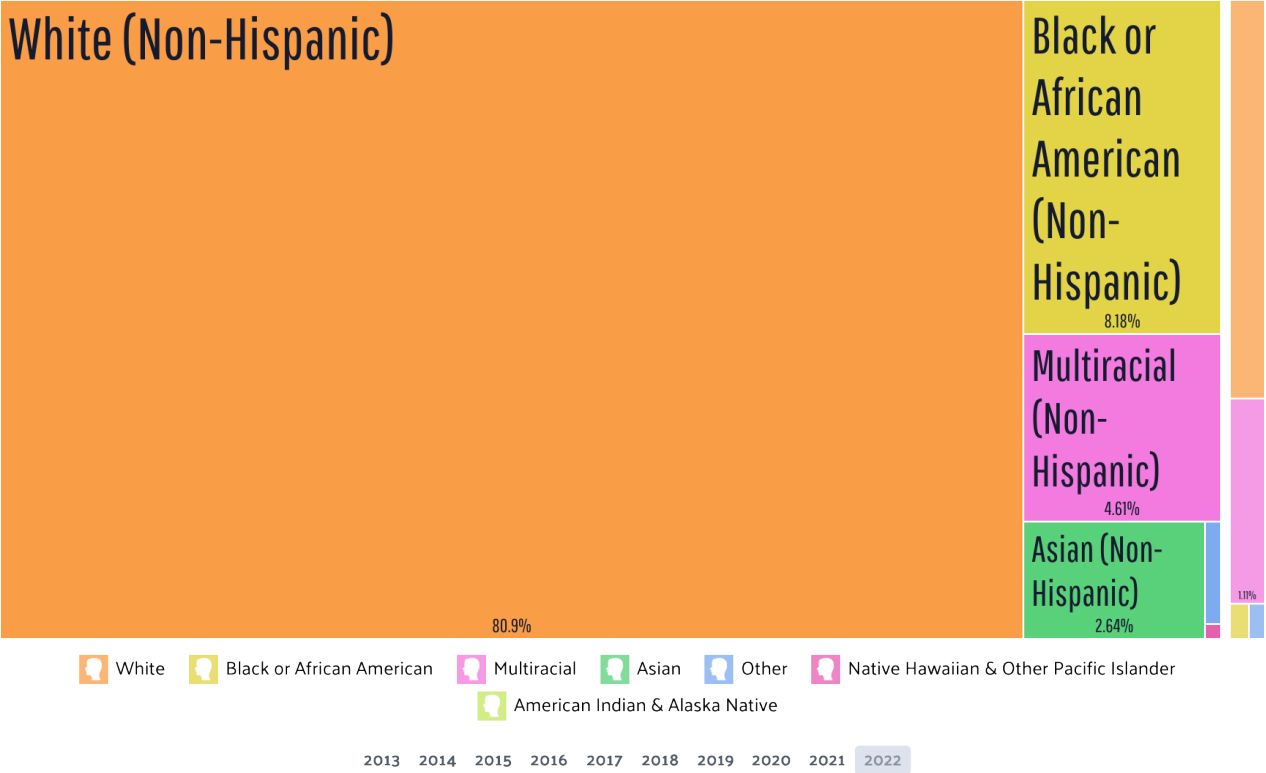
- Health (2/3)
- Education (/4)

Areas not finished:

- Environment (0/5)
- No recommendations will be made. This is the job of future researchers.

Baseline

- 2023 Davidson Population:
- Black 8.3%
- Hispanic: 3.5%
- Asian: 2.68%
- White: 80.9%



Policing:



Arrests

Score: 0/1

Davidson Arrests:

- White: 24 (69% of arrests)
 - 80% of population
- Black: 12 (34% of arrests)
 - 8.3% of population
- Total arrests: 35

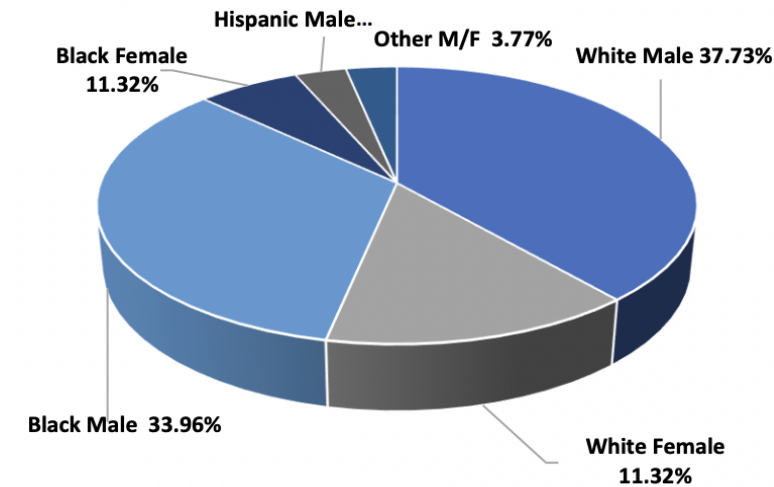
Equity Score:
INEQUITABLE, 0/1

Davidson Police Department Stats:

Arrests relative to population:

- White male 37.7% + white female 11.32% =
 - White 49.02% arrests
 - White population is 80.9%
- Black male 33.96% + black female 11.32% =
 - Black arrests 45.28%
 - Black population is 8.3%
 - Black people in Davidson are arrested 5.5x their demographic

Arrests by Racial Background



Drug Arrests

Score: 1/1

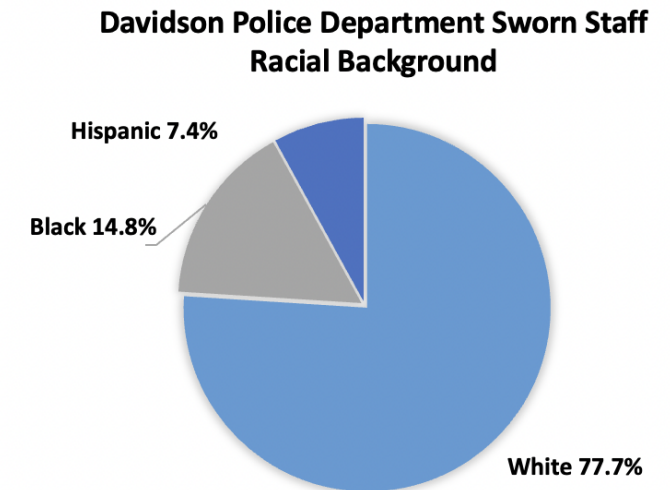
[FBI Statistics:](#)

Drug Arrests:

- Marijuana possession arrest:
 - White: 2
 - All others: 0
- Marijuana citation:
 - Black: 1
 - Hispanic: 1
 - "Other": 1

- Opium or cocaine arrests:
 - White: 2
 - All others: 0

Equity Score:
EQUITABLE 1/1

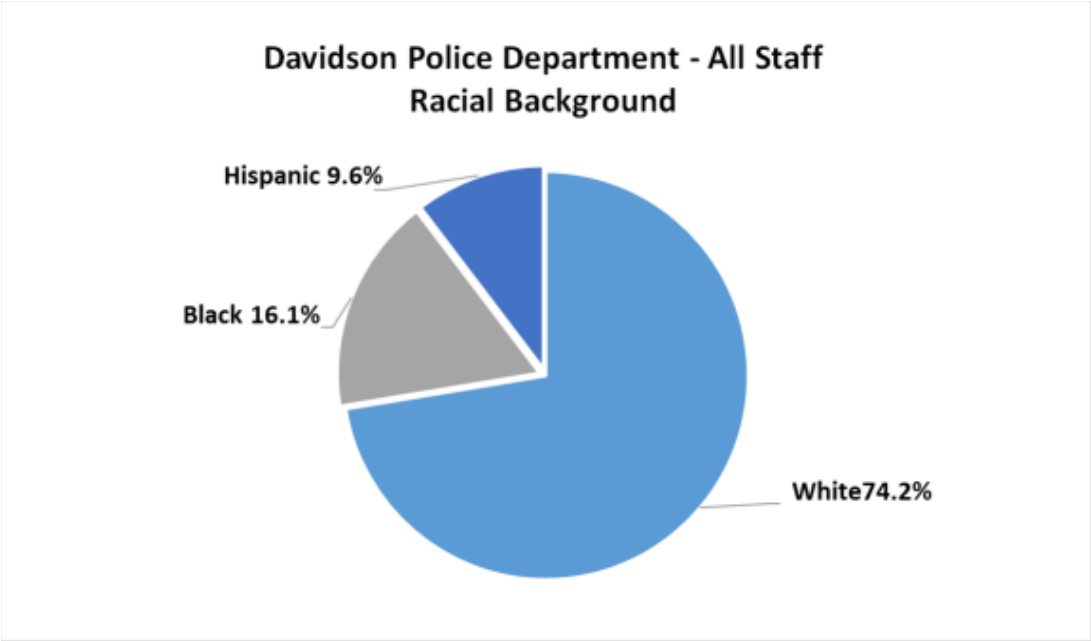


Diversity of Police Force

Score: 1/1

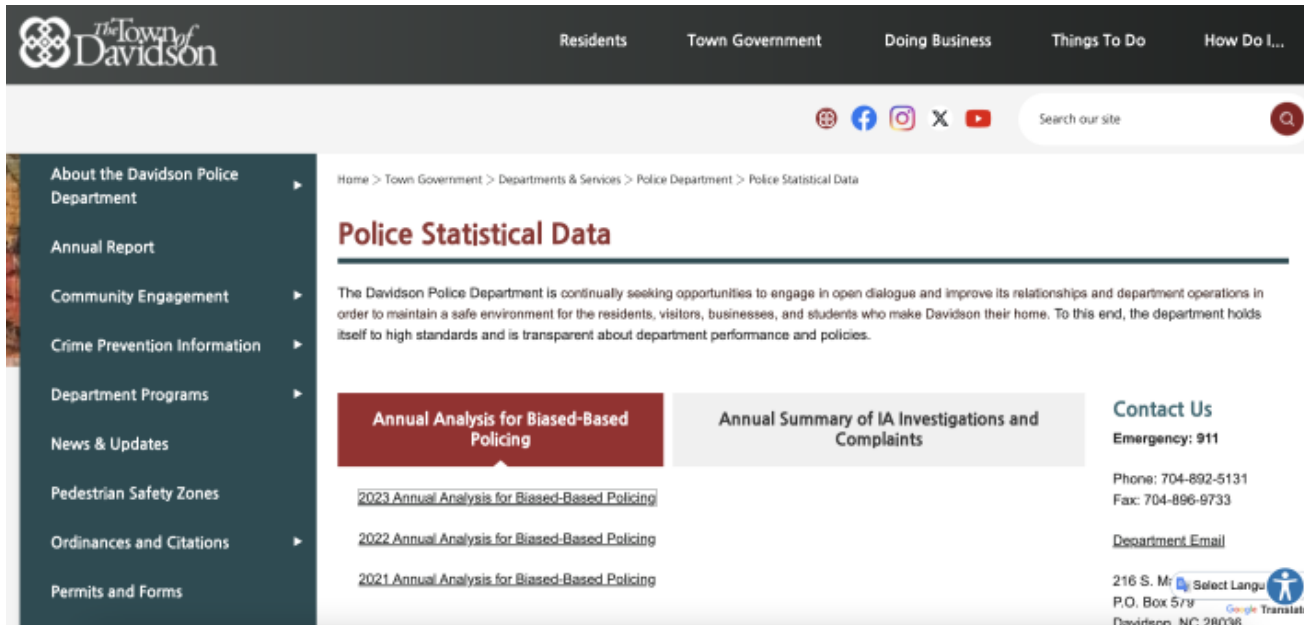
- Davidson population:
- Black 8.3%
- Hispanic: 3.5%
- Asian: 2.68%
- White: 80.9%

Equity Score:
EQUITABLE
1/1



Methodology and Sources

- FBI crime statistics
- Town of Davidson Police Report
- ABC Our America Equity Report



Housing:



Segregation Score: 0/1

Black population = B = 693
 White population = W = 11,279

- **DISSIMILARITY INDEX FOR DAVIDSON = 0.44**
- 0= No Dissimilarity, 1=Complete Segregation
- Dissimilarity Index Calculation
- $(1/2) \sum |b_i/B - w_i/W|$
- **Equity Score: INEQUITABLE, 0/1**

Tract (block)	b_i	w_i	b_i/B	w_i/W	$b_i/B - w_i/W$	$ b_i/B - w_i/W $
1	341	1,591	0.492	0.141	0.351	0.351
2	149	1,397	0.215	0.124	0.091	0.091
3	15	2,191	0.022	0.194	-0.172	0.172
4	10	1,634	0.015	0.145	-0.13	0.13
5	57	1,871	0.082	0.166	-0.084	0.084
6	121	2,595	0.175	0.230	-0.055	0.055
					Sum $ b_i/B - w_i/W $	0.883
					Div b 2	0.4415

Methodology and Sources

- ACS (American Community Survey)
- Howard University Professor Rodney D. Green, Ph.D.
- ABC Our America Equity Report



A screenshot of a website page from Howard University. The header includes the Howard University logo and 'College of Arts and Sciences'. Below the header, there are navigation links for 'COAS Centers' and 'Research Centers'. The main title of the page is 'The Dissimilarity Index as a Tool for Accountability in Ending Racial Segregation'. The author is listed as 'Rodney D. Green, Ph.D.'. The page content begins with a paragraph discussing racial segregation in housing and the impact of legal policies like FHA-sponsored redlining and covenants. It mentions Supreme Court decisions such as Shelley v. Kraemer (1948) and Jones v. Mayer Co. (1968), and federal acts like the Civil Rights Act of 1964 and the Fair Housing Act of 1968. The text continues to discuss the Index of Dissimilarity (DI) as a statistical tool for measuring segregation.

A special thank you to...

- Bonner Scholars Program
 - Christina Eggenberger
 - Hannah Gilbert
- Parker Nunn
- Alexander Cahill
- The Town of Davidson



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AGENDA MEMO

To: Davidson Board of Commissioners
From: Alexander Cahill, Affordable Housing & Equity Director
Date: December 19, 2024
Re: Equitable Engagement Framework (DRAFT)

ITEM SUMMARY/OVERVIEW

The Town of Davidson is committed to preserving its unique character and charm while also promoting diverse representation, inclusive and welcoming environments, transparency, and accountability. One way that we ensure that these values are being upheld is through community engagement efforts. In order to serve the community equitably, an equitable framework around engagement is being proposed to guide future endeavors.

This framework is meant to codify best practices in the engagement field into the work of Town operations. The AHEB is being asked to review the draft framework and provide insight and feedback on the framework.

ACTION/PROPOSED MOTION

Recommend approval of the Equitable Engagement Framework to the Town Board.

RELATED TOWN GOALS

Strategic Plan Alignment

Affordable Living, Equity & Inclusion - Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice.

Core Values

Davidson's historic mix of people in all income levels and ages is fundamental to our community, so town government will encourage opportunities, services, and infrastructure that allow people of all means to live and work here.

NEXT STEPS

The Town Board will have to approve this item.



**Framework for
Equitable,
Inclusive, Valued,
and Empowered
Engagement**

Introduction

The Town of Davidson is committed to preserving its unique character and charm while also promoting diverse representation, inclusive and welcoming environments, transparency, and accountability. One way that we ensure that these values are being upheld is through community engagement efforts.

This Engagement Framework is designed to align with the values of the Town of Davidson while ensuring that our engagement approach is equitable, accessible, inclusive, and empowering. It aims to ensure that community voices, especially those from historically marginalized and underserved populations, are heard and, where possible, represented in the Town of Davidson's decision-making process, minimize adverse effects, and maximize benefits for low-income and priority groups.





Background

The Town of Davidson has a long-standing commitment to community engagement and recognizes a need for a standardized, intentional, and equitable approach. Davidson's position within the growing Charlotte-Mecklenburg Metropolitan region adds urgency to the need for community engagement. As development pressures and the demand for more housing, specifically affordable housing increase, the Town of Davidson will work to ensure that residents are not only informed, but also actively engaged. Inspired by other North Carolina jurisdictions, this framework aims to address the systemic barriers that prevent participation from all members of our community in Town's decision-making.

The Town of Davidson seeks to build on other North Carolina models, adapting it to the Town's unique values of community character, sustainability, and inclusion, as outlined in the Davidson Comprehensive Plan and Climate Action Plan. Through this framework, Davidson aims to shift the focus from simply gathering feedback to fostering long-term relationships with its population, ensuring that the Town's future reflects the needs and aspirations of its current and future residents.



What is Equitable Engagement?

Equitable, inclusive, valued, and empowered engagement is a process that goes beyond traditional community engagement by emphasizing the participation of those who are most affected by governmental decisions yet often least represented. Equitable engagement seeks to ensure that a representative cross-section of a community is actively involved in the decision-making processes.

The goal of cultivating equitable engagement is to center voices that have historically been marginalized or underserved because these are the community members who are most likely to experience the greatest impact from public policies and Town projects.

Collecting lived experience and community voice information from the entire community is a key value of this. This type of engagement requires identifying and addressing systemic barriers that limit access; such as language differences, financial constraints, or lack of access to information; and providing resources like stipends, transportation, childcare, and translation services to remove those barriers. Equitable engagement emphasizes transparency, power-sharing, and accountability, ensuring that contributions from all participants are respected and integrated into decision-making. This approach fosters trust, builds long-term relationships, and ensures that communities are not just informed, but empowered to take action to help shape the outcomes that impact their lives.

Guiding Principles

The following principles will shape Davidson's engagement strategy:

- **Inclusivity:** Ensure that outreach includes people from representative demographics, including race, ethnicity, age, gender, and socio-economic backgrounds, with a particular focus on those most impacted by decisions.
- **Accessibility:** Reduce barriers to participation by providing stipends, childcare, accessible meeting spaces, and translation services (as funding allows).
- **Transparency:** Communicate openly with residents about decision-making processes, including what is being decided and how their input will be used.
- **Collaboration:** Work with community partners, organizations, and local media to extend outreach and build trust.
- **Long-term Relationships:** Develop ongoing relationships with community members, prioritizing sustained engagement beyond one-time events.
- **Acknowledgment:** Acknowledge Davidson's past and present inequities. Acknowledge those working to advance the public good.



Goals

The primary goals of this framework are to:

1. **Ensure Representation:** Engage a cross-section of Davidson's population that reflects its diversity, focusing on key geographic and demographic factors.
2. **Apply an Equity Lens:** While engaging all, emphasize communities most affected by Town decisions and those who have been historically marginalized or excluded. For community efforts with a goal of equitable opportunity and outcomes to reach that goal, equity must be embedded all throughout. Equity must be part at the center of the “doing,” not seen as an add-on or distraction.
3. **Build Trust:** Establish long-term relationships with community members through transparent and responsive engagement.
4. **Compensate Participation:** Provide stipends (when funds are available) to reduce barriers to participation and compensate community members for their time and contributions.
5. **Sustain Participation:** Foster ongoing engagement by providing multiple opportunities for community input at various stages of projects.
6. **Avoid Extraction:** In the extraction model of engagement, communities are not involved in developing the scope, process, or the validity of the findings. This can lead to outsiders obtaining information rather than local people gaining and using it. It can also lead to burnout and engagement fatigue.
7. **Validate Qualitative and Quantitative Methods of Data Collection in Engagement:** Create and perpetuate a system where qualitative comments and stories from community engagement are used to complement and support quantitative data.



How Do We Engage Our Community Equitably?

Step 1: Define the Level of Engagement

Being intentional from the beginning of a project or effort helps tie the outcomes sought with the process that is being designed, and prevents the engagement from being performative.

- **Inform:** Provide clear information about Town projects, policies, and decisions. Use newsletters, social media, and other community mediums to share information.
- **Consult:** Gather feedback through surveys, public comment periods, and focus groups.
- **Involve:** Provide opportunities that encourage active participation in discussions through Town meetings, workshops, and events.
- **Collaborate:** Partner with community members to co-design and implement projects, including advisory committees and task forces. Consider providing stipends to participants who engage in extended consultations, especially from underrepresented groups (as funding permits).
- **Value:** Value what we hear by documenting comments received and incorporating comments where possible.
- **Empower:** Design measures to increase the degree of autonomy and self-determination in people and in communities in order to enable them to represent their interests in a responsible and self-determined way while acting on their own authority.

How Do We Engage Our Residents Equitably?

Step 2: Identify Who to Engage

- While engaging all, emphasize engagement with historically underrepresented groups and/or those most impacted by a decision, project, or program.
- Gather baseline demographic data to ensure representative participation, focusing on the Davidson community's socio-cultural and geographic diversity.
- Establish partnerships with local organizations, places of worship, schools, and other community centers to broaden outreach.
- Identify who would be most impacted by the project, process, or decision.



How Do We Engage Our Residents Equitably?

Step 3: Overcome Barriers to Participation

- **Provide Stipends:** Offer financial compensation for participation to community members who engage in consultations, serve on advisory boards, or contribute substantial time to engagement activities (as funding allows).
- **Childcare:** Offer childcare services during in-person engagement sessions to remove barriers for families or provide childcare reimbursement.
- **Accessibility:** Ensure meeting spaces are ADA-compliant. Offer virtual options to accommodate various schedules when possible.
- **Language Services:** Provide translated materials and interpretation services to accommodate non-English speakers. Ensure translators are compensated for their work. Provide information in both English and Spanish and monitor trends in other non-English language prevalence.
- **Transportation:** Provide transportation services, transit passes, or reimbursement to ensure residents can attend events, including through Charlotte-Area STS, Microtransit, or Rideshare reimbursement.
- **Timing:** Recognize non-traditional work and those who have to work multiple shifts to make ends meet. Schedule with these time barriers in mind.

How Do We Engage Our Residents Equitably?

Step 4: Measure Success

- Use quantitative and qualitative metrics to track the representation and level of participation. Ensure demographic and geographic data collection is part of every engagement effort.
- Assess whether engagement efforts successfully reached underrepresented groups and adjust strategies accordingly. Success should not only be based on numbers but also on the quality of engagement.
- Monitor and track where and how inputs/feedback from community was or wasn't used in decision-making or in the final product.

Step 5: Build Long-Term Relationships

- Foster ongoing relationships by keeping the community informed about the impact of their comments.
- Maintain open communication channels for future engagement opportunities, ensuring continuous participation from diverse groups.

Step 6: Circle Back & Close the Loop

- The most powerful step in equitable engagement is closing the loop and circling back. Sharing back with the community and asking “did we hear you correctly” is powerful in two ways. First, it shows that we are actively listening and not holding sessions just to hold them. More importantly it allows us to hear where we are wrong. We all come with a lens/bias/experience that shapes how we hear and receive things. Going back to community and asking if we heard them correctly allows us to be wrong, and then to get it right before deciding to use or not use feedback collected.

Stipends and Incentives for Participation

In an effort to encourage participation and remove barriers for community members, particularly those from low-income or historically excluded groups, the Town of Davidson will (when funding is available):

- Provide stipends to residents who dedicate time to advisory boards, task forces, or extensive engagement activities
- Compensate community members who assist with outreach efforts for and with the Town
- Compensate community member who co-lead or co-design engagement and/or outreach efforts for and with the Town

Town staff should refer to the Stipend Policy, Policy XX-XXX, when determining if a stipend should be provided.



Did you know...

- There are 8 advisory boards and commissions you can apply to.
- Most advisory boards and commissions meet once a month.
- Each advisory board or commission has it's own webpage on the Town of Davidson website to learn more about each one in depth.

- Affordable Housing & Equity Board (AHEB)
- Design Review Board (DRB)
- Historic Preservation Commission (HPC)
- Livability Board
- Planning Board
- Public Art Commissions (DPAC)
- Sustainability Board
- Board of Adjustment

Implementation and Accountability

- **Community Engagement Team:** Establish a dedicated team responsible for planning and executing engagement efforts. The team will include representation from representative community groups and Town staff.
- **Accountability Mechanisms:** Regularly review the demographic and geographic data collected during engagement efforts to ensure goals of representation are being met.
- **Decision Rationale:** When outcomes differ from popular opinion, the majority, or the loudest voices – this will be mitigated through gaining buy-in on trade-offs early in the process and setting a clear scope or what is being collected.
- **Flexibility:** The engagement process will remain flexible to adapt to changing community needs and to continuously improve based on participant and non-participant feedback.
- **Transparency:** The comments collected will be posted on the Town's website or designated engagement platform and made available within 2 weeks of an engagement event or session, in their raw form. Thematized data will be provided when possible.
- **Attribution:** When commentary or feedback is used, it will be attributed to the source (the event it was collected at). Comments that are not used to inform decisions will be clearly denoted as such.



Strategies in Our Toolkit

Enlisting the Right Messengers

Work with community leaders to identify and enlist the people in the community who can help gain broader participation. They can include our staff members and colleagues, faith leaders, neighborhood leaders, advisory boards, and youth activists.

Encouraging Ownership of the Process

Encourage community members to tell their own stories about equitable engagement and why it is important to them. This can provide a sense of ownership of the plans and programs, fostering authentic and sustained community-based engagement and advocacy.

Meeting People Where They Are

Create opportunities to talk and listen to community members at places where they already meet, feel comfortable, or feel safe.

Listening

Listen closely to the feedback shared and engage community members and voices that have not been heard in the process.

Thematizing

Create qualitatively themed buckets of information to better organize, sort, and utilize community comments.

Scalability

Recognize the Town of Davidson needs to scale efforts to align with our resources and overall strategic goals.

Strategies in Our Toolkit

Monitoring

Monitor participation throughout the process and refer back to this guide to refine your methods of keeping the community involved as needed.

Demonstrate

Demonstrate to the community how their comments are helping to inform the process.

Metrics

Use community-informed metrics or equity indicators to assess how effective and equitable the engagement process is and how it can be improved for future events. Check in on how folks felt the engagement went and adapt accordingly.




What this framework is not?

This framework cannot plan for every event that may arise in engagement efforts. While it is a robust and comprehensive framework, it is meant to work to support other Town initiatives and plans. This framework does not apply to public comments made at public hearings or in front of Boards or Commissions (those comments are regulated by statutes and bylaws).

How to use this framework?

This framework is guidance that should be used when planning engagement processes. Any project that would benefit from an engagement effort should use this guide. Remind ourselves that engagement is an ongoing process. For those of us who like to close something out and move on, this is a paradigm shift and will require a shift in our work.



	<p>CONTÁCTENOS</p> <p>Apartado Postal 579 Calle Sur 251 Davidson, Carolina del Norte 28036</p> <p>Teléfono: 704-892-7591 Teléfono: 704-892-3971</p> <p>Envíe un correo electrónico a los comisionados Más información de contacto</p>	<p>ENLACES RÁPIDOS</p> <p>Oportunidades de Carrera Vías verdes Proyectos de la ciudad Tránsito Aparcamiento</p>	<p>ENLACES DEL SITIO</p> <p>Hogar Mapa del sitio Contáctenos Accesibilidad Avisos de derechos de autor política de privacidad</p>
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AGENDA MEMO

To: Davidson Board of Commissioners
From: Alexander Cahill, Affordable Housing & Equity Director
Date: December 19, 2024
Re: Staff Updates

ITEM SUMMARY/OVERVIEW

MLK Day
January Appointments
January Leadership

ACTION/PROPOSED MOTION

To receive updates from Town staff.

RELATED TOWN GOALS

NEXT STEPS