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## COMMUNITY & ECONOMIC DEVELOPMENT OFFICE

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149 CHURCH STREET • ROOM 32 • CITY HALL • BURLINGTON, VT 05401  
(802) 865-7144 • (802) 865-7024 (FAX)  
[www.burlingtonvt.gov/cedo](http://www.burlingtonvt.gov/cedo)

TO: City of Burlington City Council  
Community Development & Neighborhood Revitalization Committee

FROM: Noelle MacKay  
Director, Community & Economic Development Office (“CEDO”)

DATE: January 11, 2017

RE: **Inclusionary Zoning (IZ) Ordinance  
Notes Regarding Monitoring**

This memo serves to give further information related to questions, comments, and recommendations about the monitoring of IZ units which were expressed found in the “Evaluation of the City of Burlington’s Inclusionary Zoning Ordinance” by czb LLC and dated January 2017 (“Report”).

The Report calls out that **“units managed or otherwise controlled by not-for-profit agencies (approximately 46% of all inclusionary units), are routinely monitored by those agencies [their emphasis].** Please note that 70% of the units referenced above are also monitored annually by CEDO for compliance with the federal Home Investment Partnerships (HOME) requirements. HOME income and rent limits exceed the IZ ordinance requirements.

The Report also finds that **“a sufficient long-term monitoring system has never truly developed” [their emphasis]** for the remaining units. In response to the discovery of this longstanding oversight, CEDO has been working to create a new monitoring system over the past year. Specifically, CEDO has:

- Researched and built files for all known IZ projects since its inception. This involved a substantial research using individual Planning & Zoning records, electronic files, as well as the City Assessor’s database. This effort is ongoing and we are working assiduously to fill in missing gaps in information.
- Greatly expanded, corrected, and updated the “Inventory of Inclusionary Zoning Units” spreadsheet with information necessary to monitor individual units.
- Developed draft monitoring policies and procedures which includes protocol for ensuring compliance at project completion and for the 99 year term of affordability. Please find a draft policy attached.

- Designated two CEDO staff responsible for IZ monitoring: the Housing Program Manager and the Grants Specialist.
- Planned to notify owners of IZ units that annual monitoring will commence in 2017, after public vetting of the proposed policies and procedures.

Increased funding from the Housing Trust Fund has made the above possible. Continued funding at this level is necessary so the City can ensure that IZ ordinance income and affordability requirements are satisfied in the future.

Encl: IZ Monitoring Policy and Procedure

cc: Marcy Esbjerg, CEDO  
Todd Rawlings, CEDO  
Gillian Nanton, CEDO



EQUAL HOUSING OPPORTUNITY