

COURSEWARE

GUIDEBOOK

EDITION 2022



EMPOWERING PRIVATE INVESTMENT TO
SOLVE AFFORDABLE HOUSING

SUMMARY

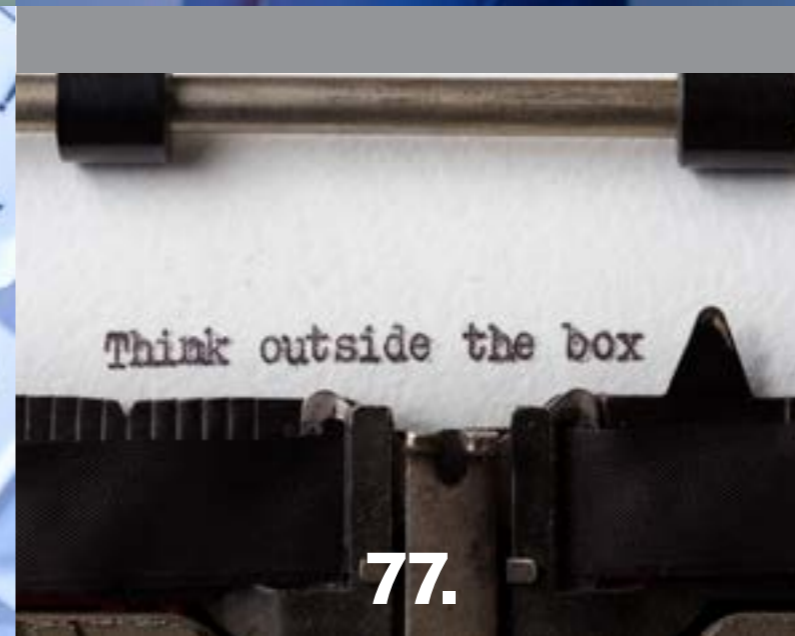
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SESSION 1

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SESSION 2

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SESSION 5



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SESSION 10

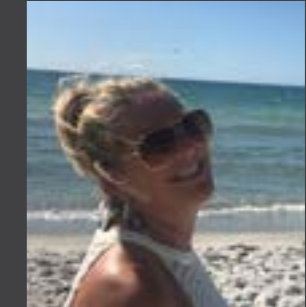
ABOUT US



Daniel R. Fitzpatrick Mr. Fitzpatrick is the President of the Tiny Home Industry Association And Director Of Government Relations for the American Tiny House Association. He is a passionate supporter for development of opportunities for tiny homes and moveable tiny homes as a means to meet the ever-growing need for affordable and sustainable housing.

Mr. Fitzpatrick has over 48 years of broad executive level management and administrative leadership experience in both public and private sector. Because of his government and developer experience, he has been successful in working with state and local governments to amend their planning and zoning laws to permit moveable tiny houses and tiny home communities. He has made numerous presentations to planning commissions, City Councils, Boards of Supervisors and state legislative committees throughout the United States.

Dan is the President of Pacific Pathways, LLC, with offices in the Fresno and San Francisco. The company and its partners, invests in a range of real estate projects throughout California. The company also provides strategic services to public and private clients nationally. The projects range from land development and entitlement processing, through funding of commercial, apartment and single-family home projects.



Melanie Atkinson Ms. Atkinson is founder of AMP Expos, publisher of Cooking byDesign Magazine, Urban Farmer with internationally known 80 Acres Urban Agriculture and Event Architect for the Great American Tiny House Show.

A little bit about us-we have produced 35 Tiny House Shows since 2017, from coast to coast. Our company has been producing expositions since 1993, well over 350 in our portfolio. Some events we are hired by associations to produce, others we own. We have experience coordinating B2B events and B2C events. Our portfolio consists of Food Network Events, Boat Shows, RV Shows, Technology Expos, Business Trade Shows, Construction Expos, Sports Shows, Home Shows, and Tiny House Expos. Our approach is different, we strive to provide an educational environment, a gateway to the tiny house movement. We recognize the need for green construction, affordable housing, struggle for financial independence and the looming lack of residential inventory. It's a 30 year crisis, growing bigger as more millennials come of age and boomers ascend in age.

We are dedicated to moving the needle on affordable housing.

05

Tiny Home Community Development Conference

Heritage Room
1045 Lower Gold Camp Rd,
Colorado Springs, CO, 80905

Day 1 Ticket: \$295
Day 2 Ticket: \$150 prerequisite *
Live Stream Ticket: \$197

05/12/2022

05

Tiny Home Community Development Workshop

Heritage Room
1045 Lower Gold Camp Rd,
Colorado Springs, CO, 80905

Must Attend Day 1
*Day 2 Ticket: \$150
No Live Streaming Available

05/13/2022

CONFERENCE DAY 1 - THURSDAY

7:00-8:00

Breakfast & Networking

Continental breakfast, networking and opening remarks

8:00-9:15

Session 1: Developing the Plan

Defining the goals, vision, project plan, financial plan and timeline

9:15-10:15

Session 2: Building Blocks|Determine Viability

Key project research, assembling the right team members, market research, refining pro forma

10:30-12:15

Session 3: Building Blocks|Real Estate and Entitlements

Strategies for acquiring real estate, understanding government entitlements, permitting and conditions of approval

12:15-1:00

Lunch|Exhibits

1:00-2:15

Session 4: Analyzing the Numbers

Due diligence review. Title, environment, government regulations - includes land characteristics, utilities. Financial proforma review - includes budget/finance, fees & assessments, investors/finance entities/carrying costs, ROI expectations-> Go/No Go?

2:15-3:15

Session 5: Construction, Sales, Operations

Construction infrastructure, utilities, purchasing units, certificate of occupancy, operations+maintenance

3:30-5:00

Session 6: Best Practice Panel Discussion

Commercial, Non-profit, conversion micro developers share their journey

5:00-7:00

Cocktail+Networking|Exhibits

12

WORKSHOP DAY 2 - FRIDAY

7:30-8:00

Continental Breakfast

8:00-9:00

Session 7: Discussions + Homework Review

9:00-10:15

Session 8: Development of Your Business Plan

Elements of a quality business plan
The Executive Summary review
Rehearsing a compelling elevator speech

10:30-Noon

Session 9: Presentation of Business Plan to Investors

Presentations, group critique, investor feedback

Not Sure?

Why should I attend the Workshop?

A unique opportunity for one-on-one interaction with:

workshop presenters

exhibitors

potential investors, and

fellow participants

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The Tiny Home Industry Association is a national organization that represents...

→ Become a member: <https://tinyhomeindustryassociation.org/join-thia/>

Builders	Suppliers
Service	Designers
Certification	Teaching and Trade
Non-Profits	Consumers
Tiny Community Builders/Owners/Operators	
Investors	Financial Institutions




Daniel Fitzpatrick president@tinyhomeindustryassociation.org



M

Meet our Collaborators.

John Olson has a thriving practice in Urban Landscape and Design. John, an Accredited New Urbanist, Registered Landscape Architect and LEED Accredited Professional, is a co-founder of the Colorado Chapter of the Congress of the New Urbanism and Colorado Springs Urban Intervention. Over two years ago, he rejoined the Colorado Springs Urban Renewal Authority after a 5+ year absence from the URA and the Downtown Review Board.

During this absence, he was the point of contact for Better Black Pikes Peak, an Urban Intervention that occurred in Downtown Colorado Springs on September 21, 2012, as well as Curbside Cuisine. He is a co-founder of Colorado Springs Urban Intervention, an organization focused on low cost interventions with a long-term impact for the community.

He also has a passion for providing affordable housing opportunities for the Front Range of Colorado. With this passion, John currently serves as the Chair for the We Fortify Board of Directors, which is the board of Downtown's Tiny Home Village, Working Fusion.

Meet Deanne Frederickson. Deanne is a Registered Landscape Architect, who is currently the Business Development Manager for Baseline Engineering. Baseline is a full service consulting firm including Land Survey, Civil Engineering, Water Wastewater Engineering, Land Planning and Landscape Architecture. Deanne has a 25+-year career as a designer and Project manager for a wide range of land development projects throughout Colorado. Residential subdivisions, commercial developments, and large-scale master plans make up the majority of her work. Her strengths are in project initiation, budgeting, scheduling, problem solving, and entitlement coordination.

Meet Booker T Washington. As Founder and CEO of Techie Homes Inc., Booker's first project is South Park Cottages located in College Park Ga. Booker is the visionary behind the 1st Black Developed micro-home community in the U.S. Booker has dedicated years to developing South Park Cottages, and additional micro-home developments within Atlanta.

His organization, Techie Homes Inc. has announced upcoming project to include another micro home community, Union Park Cottages in Union City, GA. The companies mission to develop innovative, obtainable and tech-centric communities that will disrupt the home buying in major urban markets. As of 2022, the organization has developed more than \$10 Million in real estate assets.

Disclaimer

This presentation is intended for educational, informational and reference purposes only and does not replace independent professional advice and judgement.

Nothing conveyed or provided in this workshop by any presenter is to be considered legal, accounting, tax, real estate and/or engineering advise.

Please seek professional advice from professional building contractors, planners, engineers, real estate brokers, attorneys and/or CPAs prior to use and reliance on information provided in this workshop.

Dan Fitzpatrick president@tinyhomeindustryassociation.org

01

VISIONING #01

"I have come to learn that every great dream begins with a dreamer. Always remember, you have within you the strength, the patience, and the passion to reach for the stars to change the world."

Harriet Tubman

What I love most about the quote is the opening: Every great dream begins with a dreamer. The Wright brothers wanted to fly. Martin Luther King Jr wanted to see everyone treated based on their character, not their skin color. Everyone has a dream of some sort.

The quote continues by reminding us that we have within us everything we need to make a difference in the world. We might not be able to make our dream come true, as we cannot control other people. But we can make a difference.

The quote mentions three things which are key to making that difference. It says we have the strength to move great obstacles and weather great storms. It says we have the patience to continue to work towards our dreams when others have given up. And it says we have the passion to inspire others to join us.

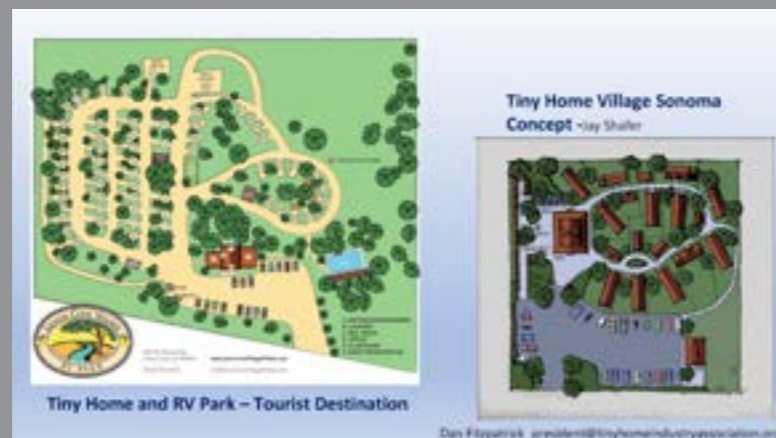
by Philosiblog on 10 August 2013



Dan Fitzpatrick president@tinyhomeindustryassociation.org



Dan Fitzpatrick president@tinyhomeindustryassociation.org



Dan Fitzpatrick president@tinyhomeindustryassociation.org

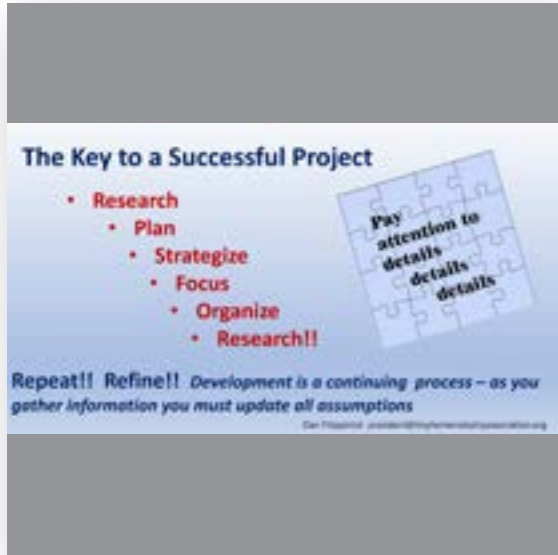
Session 1
Visioning: Turning your vision into a plan

- Business/Personal/Nonprofit Goals
- Vision
- Preliminary...
 - Project Plan
 - Financial Pro-forma
 - Timeline

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ITEM 1

3 Tabs Open On Your Computer At All Time



ITEM 2

KEYS TO SUCCESSFUL PROJECT

Begins And Ends With Research



ITEM 3

14 ELEMENTS OF DEVELOPMENT

Your Vision And Goals, Passion, Will Support You Throughout The Development Process



ITEM 4

PROJECT VALUE & STEPS

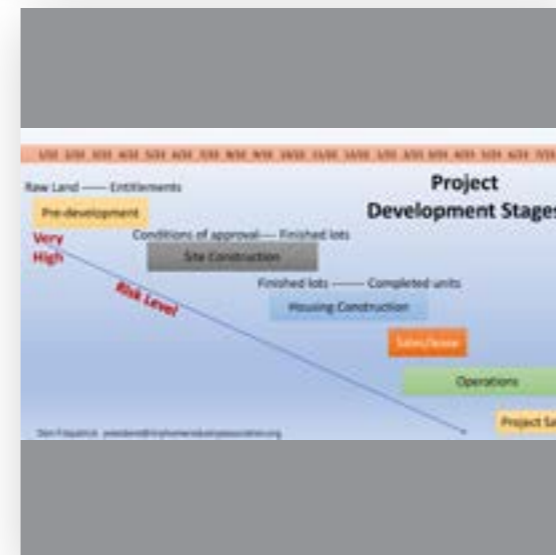
What's The Difference?



ITEM 5

THE M WORD

Understanding The Function Of Money In Developing Projects



ITEM 6

RISK LEVEL THROUGH THE DEVELOPMENT STAGES

Correlation Between Timeline And Risk



ITEM 7

DEFINING BUSINESS & PERSONAL GOALS

Goals Define The Music Of Your Development ~Legal Structure Is Your Instrument

What is your Vision for your tiny home community?

- Large Residential Development
- Small Private Pocket Neighborhood/Village
 - o Cottage Cluster, Bungalow Court
- Resort Development
- Housing and Service Support
- Combination of Elements



ITEM 8

YOUR VISION ?

Start with Broad Strokes:

Vision (continued)

- Location - Urban Infill, Rural, Suburban
 - Distance from tourist destination or workforce nexus, metro area
- Type Housing and Density
 - Affordable and/or Market rate housing
 - Density
 - Rental or sales – rental of spaces or units, or combination
 - Long or short-term rentals
 - What type tiny homes – foundation, movable or combination
- Who do you see buying or renting your units – to whom are you providing housing?



ITEM 9

ADD DETAILS TO YOUR VISION

Narrow the Focus:

Vision (continued)

Integration of **required** elements into your vision/sketch plan?

- Cars – central parking or at unit (garage/covered) – movement of MTHs
- Pedestrian friendly – sidewalks, pathways
- Fire protection **Security**
- Roads and utility service elements – water, sewer/septic, electricity
- Storm water management
- Environmental: Energy self-sufficient, water conservation,
- Garbage collection – individual or central

What are governmental requirements?



ITEM 10

ADDING DETAILS

Define Community Services and Infrastructure:

Vision (continued) What discretionary items do you wish to have in your project?

- **Facilities:**
 - offices, club house/multi service center, training/services* center
 - Laundromat(S), maintenance and service buildings
 - Pool and/or Recreation courts, picnic area/pavilions, WiFi,
 - Storage(S) – open and/or close
- Open space, community gardens, recreation, chickens, pet area
- Hiking biking trails
- Landscaping

What amenities can your project support? What is your competition offering?



ITEM 11

MAKING YOUR DEVELOPMENT A COMMUNITY

Add Discretionary Items:

01

Preliminary Project Sketch Plan

What would your dream project look like?

- Take a typical parcel of land or land you own or wish to buy and begin to sketch
 - Google earth County or city GIS maps
- Search tiny home community images for ideas and visits to communities - pics of what you like
 - Google images Instagram Pinterest Facebook
- Collect/Save/Sketch your basic ideas and work with **land planner and/or civil engineering** firm to translate into design




ITEM 12

SKETCH PLAN

Find Inspiration, Capture It, Keep a Vision File

Tiny Home Development - Concept



John Olson, RIA | LEED AP | CNU-a

ITEM 13

CONCEPT PLANS-JOHN OLSON

Thoughts:



ITEM 14

PRINCIPLES OF URBAN LANDSCAPES

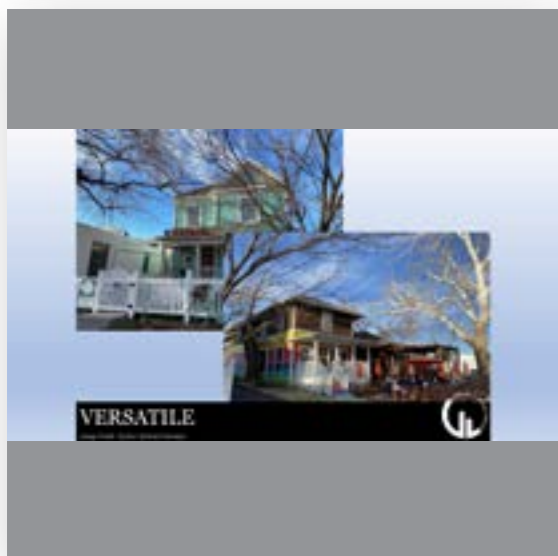
Thoughts:



ITEM 15

SUSTAINABLE

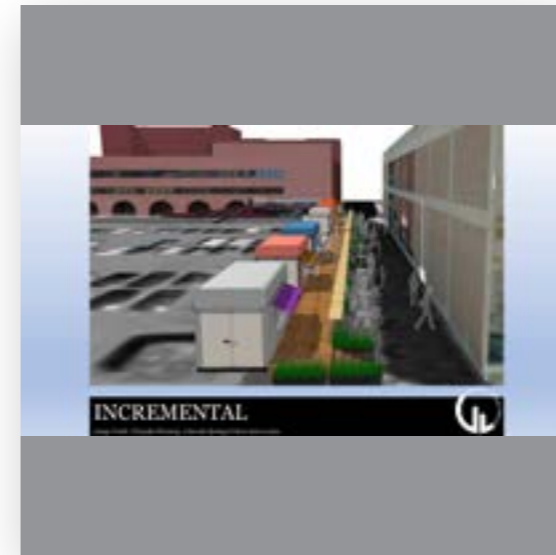
Thoughts:



ITEM 16

VERSATILE

Thoughts:



ITEM 17

INCREMENTAL

Thoughts:



ITEM 18

INCREMENTAL

Thoughts:



ITEM 19

COTTAGE SQUARE, OCEAN SPRINGS MS

Thoughts:

01



ITEM 20

TINY HOMES LONG TERM STAY

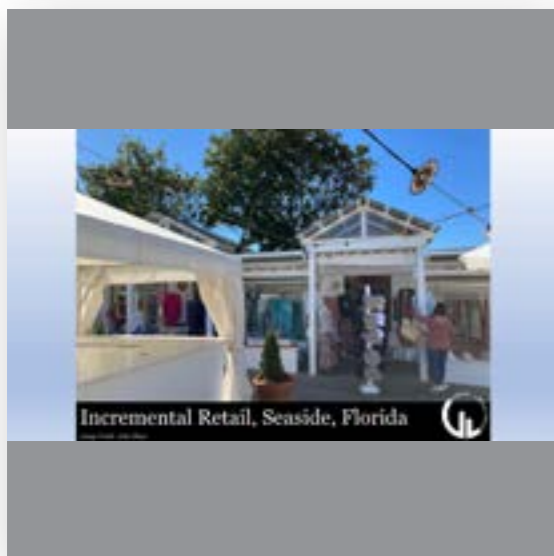
Thoughts:



ITEM 21

VISION SKETCH

Thoughts:



ITEM 22

INCREMENTAL RETAIL SEASIDE FL

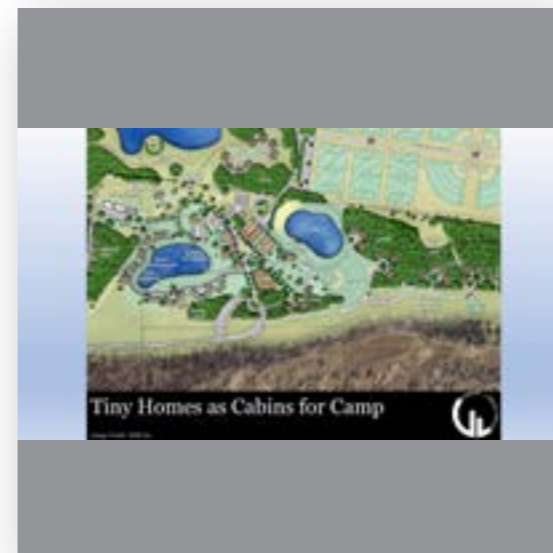
Thoughts:



ITEM 23

TINY HOME IN LODGING CONTEXT

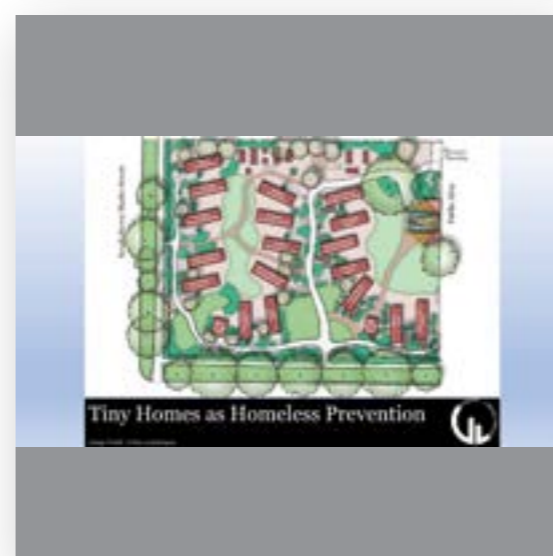
Thoughts:



ITEM 24

TINY HOMES AS CABINS FOR CAMP

Thoughts:

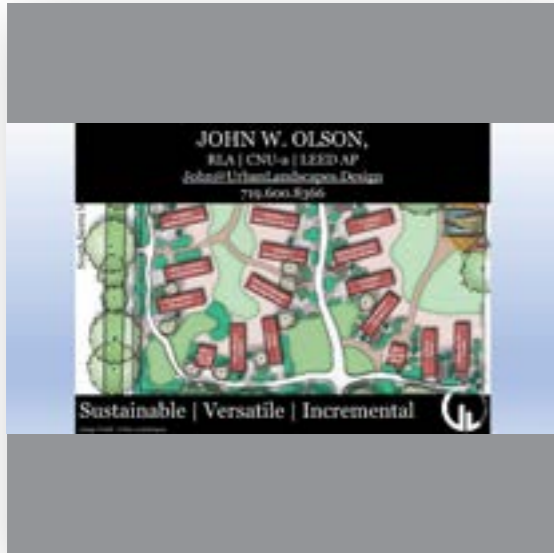


ITEM 25

TINY HOMES AS HOMELESS PREVENTION

Thoughts:

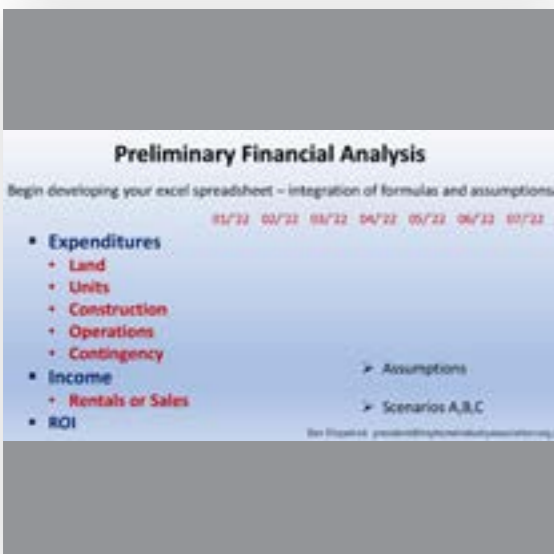
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ITEM 26

JOHN W. OLSON
JOHN@URBANLANDSCAPES.DESIGN

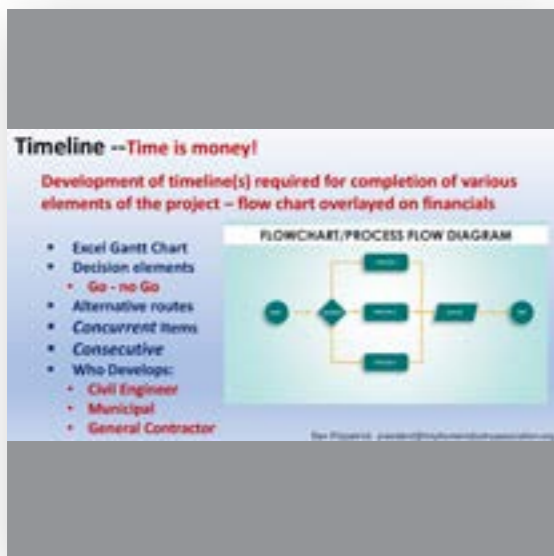
Thoughts:



ITEM 27

PRELIMINARY FINANCIAL ANALYSIS

Understanding the Components of the Proforma



ITEM 28

TIMELINE ATTRIBUTES

Find your Timeline Tools



ITEM 29

TIMELINE DETAIL

Create A Document/Chart With Flexibility To Accommodate And Track Change

01



ITEM 30

VISION GOAL REALITY CHECK

Updates:



ITEM 31

INSPIRATION

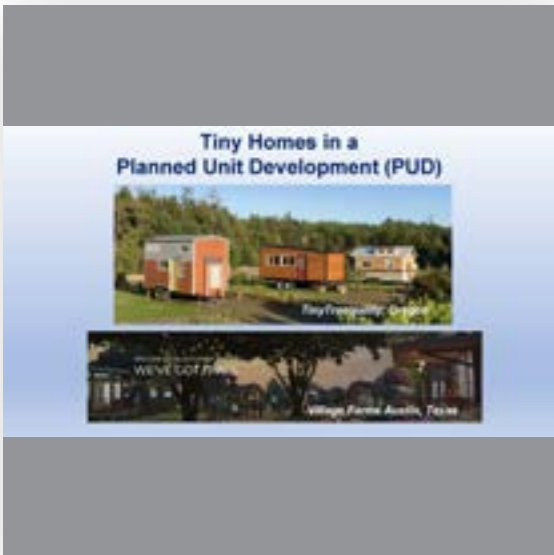
Thoughts:



ITEM 32

TINY HOME COMMUNITIES

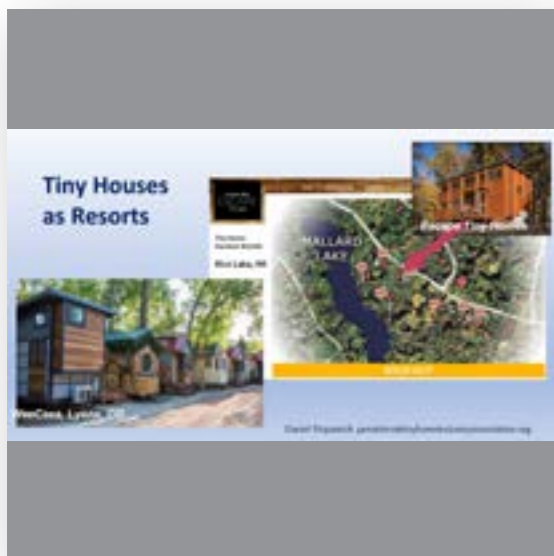
Thoughts:



ITEM 33

PLANNED UNIT DEVELOPMENT

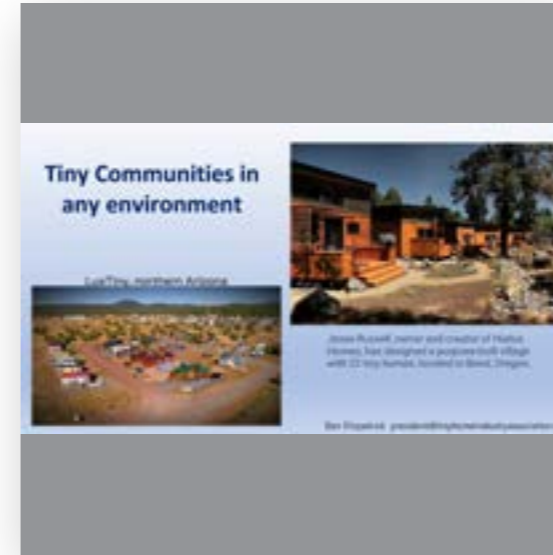
Thoughts:



ITEM 34

TINY HOME RESORTS

Thoughts:



ITEM 35

NATURAL HABITATS

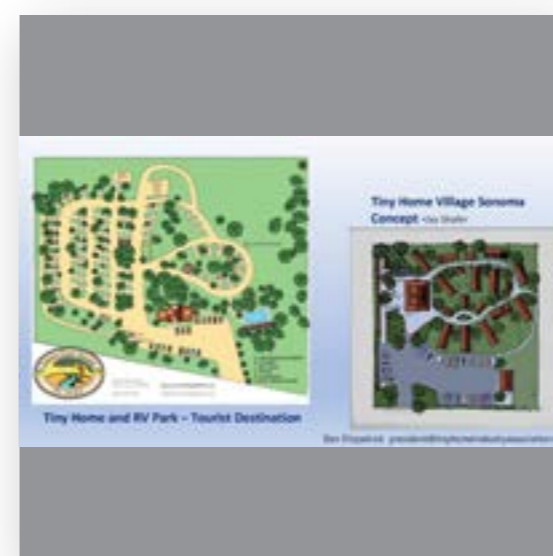
Thoughts:



ITEM 36

TYPES OF TINY HOMES

Thoughts:



ITEM 37

RENDERING INSPIRATION

Thoughts:

01

Assembling Your Team of Professionals

- What professionals do you need to hire?
- What do they do?
- When do you engage?
- What do they produce?
- Who do you hire?



Dan Fitzpatrick president@tinyhomeindustryassociation.org

2.

Professional Services Team (continued)

- Attorney
 - Real estate transactions
 - Contract review
- Civil Engineer
 - Land planning*
 - Survey*
 - Infrastructure design
 - Application/Entitlements*
 - Due Diligence/Opportunity Constraints analysis
 - Budget estimates
 - Construction




Dan Fitzpatrick president@tinyhomeindustryassociation.org

4.

Professional Services Team (continued)

- Land Planner
 - Develops plan
 - Entitlement
 - Environmental
 - Due Diligence
- Surveyor
 - boundaries
 - Easements
 - topographic survey





Dan Fitzpatrick president@tinyhomeindustryassociation.org

5.

Professional Services Team

- Real Estate Broker
 - Finding land
 - Market research/comps*
 - Assist in negotiation
LOI, option, purchase
 - Sell product – Marketing*
- Title and Escrow Company
 - Review encumbrances, easements, liens, history
 - CC&R's - Covenants, Conditions and Restrictions
 - Guarantee clear/clean title
 - Escrow



Dan Fitzpatrick president@tinyhomeindustryassociation.org

3.

Professional Services Team (continued)

- Environmental Experts – Geo tech/Soils, traffic, water, biology, geology, archeology
- Landscape Architect/Arborist
- Entitlement Consultant*
- Financial
 - CPA/Accounting/Tax
 - Investors/Banks
 - Insurance



Dan Fitzpatrick president@tinyhomeindustryassociation.org

6.

Building Blocks for Project Development:

Elements Required for Determining Viability

- Professional Team
- Market Research
- Government Research
- Preliminary Financial Proforma
- Return on Investment



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1.

1. ITEM 1
Elements Required for Determining Viability

2. ITEM 2
Assembling Your Team of Professionals

3. ITEM 3
Professional Services Team : Real Estate Broker, Title & Escrow Company

4. ITEM 4
Professional Services Team : Attorney, Civil Engineer

5. ITEM 5
Professional Services Team : Land Planner, Surveyor

6. ITEM 6
Professional Services Team : Environmental Experts, Landscape Architect, Entitlement Consultant*, Financial

8. **Developer is the Orchestra Leader**



Dan Fitzpatrick president@tinyhomeindustryassociation.org

10. **Market Research**

Free sources of data:

- Zillow
- LoopNet

Market Analysis Report

- Real Estate listing reports
- Check nearby rentals or sales of similar project
- Real Estate brokers info
- Demographics – Local government and census data
- Visit rentals or sales in area
- Who is your competition? Can you compete?

Dan Fitzpatrick president@tinyhomeindustryassociation.org

11. **Market Research (continued)**

FOCUS on a general location

- Demographic trends
- Geographical growth trends
- Tourism/Leisure activity
- Unmet needs

Filter/Overlay – Market research with Government Research

Which communities in area are development and/or tiny friendly – what are the laws and community attitude?

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7. **Professional Services Team (continued)**

- Architect
 - Homes
 - Accessory buildings
- Housing/Building Contractor
- General Contractor
 - Construction of on and off site roads, utilities, grading




Dan Fitzpatrick president@tinyhomeindustryassociation.org

9. For a successful development you only need to know one number!

What is that number?

How do you determine that number?



Dan Fitzpatrick president@tinyhomeindustryassociation.org

12. **Governmental Research**

In what municipal jurisdiction(s) is your property located?

Town/Township/Borough/City/County/Districts

What services are provided?

Note: Services needed for your project may come from several jurisdictions – and they all want fees!



Daniel Fitzpatrick president@tinyhomeindustryassociation.org

7. ITEM 7
Professional Services Team : Architect, Housing /Building Contractor, General Contractor

8. ITEM 8
Maestro-Channel Your Inner Conductor

9. ITEM 9
Whats the Number?

10. ITEM 10
Market Research

11. ITEM 11
Combine Market Research with Government Research

12. ITEM 12
Government Research: Define Jurisdiction

Session 3

Building Blocks: Real Estate and Entitlements

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REAL ESTATE & ENTITLEMENTS #03

Notes:

Questions:

Strategies on How to Tie Up Land Without Buying It

- Mitigation of Risk
- Preservation of capital
- Protection of your principle if you buy raw land

Dan Fitzpatrick president@tinyhomeindustryassociation.org

Professional Services Team

Who is needed to get land into "contract"

- Real Estate Broker – land acquisition specialist
- Real Estate Attorney
- Title and Escrow Company(s)
- CPA/Financial & Tax Advisor

Dan Fitzpatrick president@tinyhomeindustryassociation.org

Buying Time

Reducing Risk in Land Acquisition Transactions

- Articulate your Priorities & Assess Risks
- Preserve Capital and Time – Have strategy and team ready!
- Limit \$\$ exposure
- Have a comprehensive Due Diligence plan/checklist

"Entitlements" – If possible, complete land purchase after you have government permits/approvals in hand that you can use the property for your envisioned project.

Dan Fitzpatrick president@tinyhomeindustryassociation.org

Basic Land Acquisition Strategies:

- Letter of Intent
- Purchase Agreement
- Purchase Agreement/Contingencies
- Option Agreement
- Extend Negotiations and/or buy more time

Dan Fitzpatrick president@tinyhomeindustryassociation.org

Land Acquisition and Entitlement Strategies

- This session will discuss the process of taking raw land through obtaining your projects legal entitlements for construction.
- This project development step is the step most fraught with potential problems, issues and risks.
- This phase is a tough risky business!
- But it can be the most rewarding financially!

Dan Fitzpatrick president@tinyhomeindustryassociation.org

LOI – Letter of Intent

An LOI is used to outline the intentions of buyers and sellers before a final legally binding agreement. Are the parties on the same page??

Standard Elements - Terms and Conditions:

- ID of buyers and sellers and Property (APN)
- Price to be paid for property - Consideration
- Time frame - completion/execution of Purchase Agreement
- Deposit of Earnest money in Escrow and when it goes "hard"
- Basic Obligations of Parties

Dan Fitzpatrick president@tinyhomeindustryassociation.org

LOI – Letter of Intent (Continued)

- Contingencies – financing, entitlements
- Deposits and distribution instructions
- Due Diligence Period
- Closing
- Binding or non-binding agreement

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

8.

Contract of Sale/ Purchase Agreement

Your LOI gets memorialized in a legally binding agreement, commonly know as a Purchase Agreement – details of all terms/conditions/price

- Can use standard Real Estate forms specifically designed for Land Acquisition – spell out terms and conditions or a Detailed Purchase Agreement
- Upon execution, this document becomes the “Bible” to guide the entire transaction – review, review and review!

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

9.

Sales Agreement with Contingencies

Contingencies: Agreement specifies timetable for completion and responsibilities of the parties – such as:

- Financing
- Government Approvals – Entitlements
- Successful completion of Due Diligence
- Clearance of Title Issues by Seller
- Right of Transfer of Purchase Agreement – “Seller cannot unreasonable withhold transfer”

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

10.

Option Agreement

A sales transaction that permits you the “option” to buy a property in the future at a set price.

- Pay for the option, usually small % of purchase \$\$
- Want the option \$’s to go toward final purchase \$\$
- Option \$’s are deposited and go to seller after due diligence period is completed – 90-120 days
- After “free look” period, option \$’s go “hard” – you can still walk away but seller has the option money to keep
- Option agreement close can be upon receipt of your government entitlements

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

11.

Example

Purchase price of land \$300,000

- Option funds deposited in escrow for \$10,000
- A 90 day Due Diligence period is specified
- At end of 90 days money goes “hard” (seller keeps deposit) or you back out of deal and recoup your \$10,000
- Purchase agreement closes X days after government approval of your entitlements – seller receives \$290,000

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

12.

Funds at Risk

Outright purchase:

- \$300,000 – purchase price
- \$50,000 – due diligence & entitlement processing
- \$2,000 carrying cost (interest on \$ for year)
- Lost opportunity cost and \$352,000 at risk

Option Agreement:

- \$10,000 – option payment
- \$50,000 – due diligence and entitlement processing
- Limited carrying and lost opportunity costs – only \$60,000 at risk

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

13.

Extending the Negotiations/Option Period

Ready – Set – GO! Have your team ready to move!

- Due Diligence periods run from date of signing Purchase Agreement
- If your DD period is 90 days, you get additional time to research the project between the LOI and PA –buying an extra 10+ days
- Request more time if you find potential deal killer early in the DD process caused by seller –example, a Title or nondisclosed environmental hazard

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

14.

Once land has been identified you can complete your due diligence and site plan

Obtaining Project Entitlements – A Discretionary Process

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

15.

Professional Services Team

- Civil Engineer
- Land Planner
- Municipal Advocacy*
- Geo Tech
- Environmental Professionals
- Construction contractors
- Attorney
- All hands on deck!

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16.

REAL ESTATE #03

Notes:

Questions:

03

- ITEM 8: LOI-Letter of Intent cont
- ITEM 9: Contract of Sales/Purchase Agreement
- ITEM 10: Sales Agreement with Contingencies
- ITEM 11: Option Agreement
- ITEM 12: Example
- ITEM 13: Funds at Risk
- ITEM 14: Extending the Negotiations/Option Period
- ITEM 15: Identify Land/Start Due Diligence/Site Plan
- ITEM 16: Professional Services Team

Entitlement Processing

Identify all entities needed to sign off on approvals/permits for project

- Prepare/Submit Preliminary Application
- Refine Plan and Submit Formal Application
- Monitor Departmental Review of Application
 - Conditions of Approval
- Planning Commission
- City Council

• Complete Purchase of Property



Daniel Fitzpatrick, president@tinyhomeindustryassociation.org

17.

Governmental Approval Process (continued):

Generally, the process is as follows:

- Staff -- review of preliminary project plan → submit final application
- Staff -- review of project → Administrative Approval or....
- Planning Commission
 - Public hearing by PC -- approval or recommendation to Municipal elected body
- Governing Body -- Hearing & Action
 - Conditions of approval




Daniel Fitzpatrick, president@tinyhomeindustryassociation.org

18.

Tiny Home Site Development

JOHN W. OLSON, RLA | CNSU-9 | LEED AP



19.


1a. Municipal GIS Website – Lot Zoning



SITE SELECTION

20.

1b. What is the Density of the Zoning?



SITE SELECTION

21.

1c. Local Political Hot Topics?



SITE SELECTION

22.

1d. Administrative Review or Public Hearing?




SITE SELECTION

23.

1e. Other Available GIS Information


Topography?
Utilities?



SITE SELECTION

24.

1f. Type of Home Planned and Building Code



SITE SELECTION

25.

ENTITLEMENTS #03

Questions:

Notes:

03

- ITEM 17: Entitlement Process
- ITEM 18: Government Approval Process
- ITEM 19: Tiny Home Site Development
- ITEM 20: 1A Municipal GIS Website- Lot Zoning
- ITEM 21: 1B What is the Density of Zoning?
- ITEM 22: 1C Local Political Hot Topics
- ITEM 23: 1D Administrative Review or Public Hearing?
- ITEM 24: 1E Other Available GIS Information
- ITEM 25: 1F Type of Home Planned & Building Code

1g. What are the Parking Standards?

MINIMUM OFF STREET PARKING REQUIREMENTS FOR SPECIFIC USES

Use Types	Minimum Required Off Street Parking Spaces in All Zone Districts, Except As Allowed in Subsection 7.3.F12A Of This Chapter
Residential use types:	
Accessory dwelling unit	1 space per dwelling unit
Attached dwelling units:	
Studio or efficiency	1.1 spaces per dwelling unit
1 bedroom	1.5 spaces per dwelling unit
2 bedrooms	1.7 spaces per dwelling unit
3 bedrooms	2.0 spaces per dwelling unit
Elderly (50 or over)	0.6 space per dwelling unit
Dormitory, fraternity or sorority houses	0.5 space per bed

SITE SELECTION

26.

2a. Land Survey

DEVELOPMENT ENTITLEMENTS

27.

2b. Site Plan/ Site Development Plan Needs

NO.	DESCRIPTION	SHEET NO.
1	CONCEPT PLAN	10 OF 16
2	SITE PLAN	11 OF 16
3	TRAIL DETAILS	12 OF 16
4	PAVEMENT GRADING & DRAINAGE PLAN	13 OF 16
5	PAVEMENT UTILITY PUBLIC UTILITY PLAN	14 OF 16
6	TRAIL LANDSCAPE PLAN	15 OF 16
7	LANDSCAPE SCHEDULE AND NOTES	16 OF 16
8	LANDSCAPE PLANTING DETAILS	17 OF 16
9	TRAIL SIGNAGE PLAN	18 OF 16
10	TRAIL ANALYSIS PLAN	19 OF 16
11	EROSION CONTROL	20 OF 16
12	EROSION CONTROL SCHEDULE & NOTES	21 OF 16
13	STRUCTURAL & PARTIAL	22 OF 16

DEVELOPMENT ENTITLEMENTS

28.

2b. Civil Engineering

DEVELOPMENT ENTITLEMENTS

29.

2c. Landscape Design

DEVELOPMENT ENTITLEMENTS

30.

3. Construction Permits Necessary

- Utility Service Permits
 - Water, WasteWater, Electric, Gas
- Grading & Erosion Control
- Building Permits

CONSTRUCTION DOCS & PERMITS

31.

4. Financial Assurances

Most Jurisdictions require some sort of Financial Assurance, or Bond Payment to the City. The amount is generally based upon the Public Improvements (Sidewalk, Curb & Gutter, Right-of-Way Landscape)

CONSTRUCTION DOCS & PERMITS

32.

Tiny Home Site Development

JOHN W. OLSON, RLA | CNSU-6 | LEED-AP

33.

With approval of Project Entitlements you may now complete your project per your "conditions of approval"

"Conditions of approval" are your roadmap for project completion - this is no longer a discretionary process - you now have a legal right to complete your project!

This is now a "bankable" project as risk has been minimized!!

34.

RE & ENTITLEMENT #03

Questions: **0**

Task List: **3**

- ITEM 26 1G What are the Parking Standards?
- ITEM 27: 2A Land Survey
- ITEM 28: 2B Site Plan/Site Development Plan Needs
- ITEM 29: 2B Civil Engineering
- ITEM 30: 2C Landscape Design
- ITEM 31: 3. Construction Permits Necessary
- ITEM 32: 4. Financial Assurances
- ITEM 33: Tiny Home Site Development
- ITEM 34: With approval of Project Entitlements "conditions of approval"

Due Diligence

Does my vision, timetable and financial proforma work for the land identified for the project?

**Go or no go?
It's decision time!**

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Dan Fitzpatrick president@tinyhomeindustryassociation.org

What is Due Diligence?

Full **disclosure** and **investigation** of facts about the physical and financial condition of the **property** and the area the property is located, and your **plan**, **prior** to completing a transaction with the seller and/or moving forward with a project.



It is the time to reconfirm all assumptions and every item in your financial proforma

Time sensitive period for "completing your homework!"

Dan Fitzpatrick president@tinyhomeindustryassociation.org

Due Diligence

Opportunities and Constraints Analysis

One can find many examples on the web of **checklists** for due diligence and opportunities and constraints analysis geared to different types of projects.

For example:

- Buying land with existing buildings,
- Buying an existing campground or RV park,
- Site construction,
- Housing construction, etc.



This presentation provides an overview of the typical analysis one completes in this **crucial** project development step.

Dan Fitzpatrick president@tinyhomeindustryassociation.org

Opportunities and Constraints Analysis

As you complete your due diligence, you will identify:

- Problems or issues with the property?
- Entitlement or utility requirements that impact use of property.
- Items that will need mitigation.
- Property assets that add or decrease value

Show such items on your preliminary land plan.

Ask:

- How can you plan around constraints or turn them into opportunities?
- How do you enhance or utilize assets?
- How do these items change your site plan and proforma?

Dan Fitzpatrick president@tinyhomeindustryassociation.org

Review of Public Documents of Property

Ask for and review all disclosures, data and reports from Sellers

Title & Escrow

- Order title report, review and get obsolete exceptions removed?
- Check encumbrances, liens,
- Tax information- jurisdictions and districts
- Ownership – who all owns the property?
- Legal Description
- Building lines and easements
- Covenants on this property? Mineral/oil rights?
- Covenants, Conditions and Restrictions (CCR'S)* (read the detail!)
- Open escrow for depositing funds and instructions



Dan Fitzpatrick president@tinyhomeindustryassociation.org

DUE DILIGENCE #04

Notes:

Questions:

LEARN

Opportunities and Constraints Analysis

ITEM 1: Decision time Go - No Go

ITEM 2: Due Diligence Checklist

ITEM 3: Understanding Due Diligence

ITEM 4: Identifying Property Opportunities and Constraints

ITEM 5: Reviewing Public Property Documents



Public Documents (continued)

Government Requirements and Resources

- Review **Assessors Records**
- Municipal **GIS** system
- Research Municipal **Building/Zoning** Regulations
- What entities, public or private, have input on this projects?
- Jurisdictional **Development Standards**
Water, Sewer, Roads, Electricity, Storm Water, Parking, garbage
Off-sites, Open Space/Recreation, Landscaping, Fees
- Research Similar Developments in area – **applications, reports**
- Visit **Staff and Key Elected Leaders**

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

Due Diligence: Utilities (continued)

- **Storm water** drainage and basin requirements
- **Flood Control** – elevations, standards
- Public or private **trash** collection – collection requirements
- Will **utility relocation** be required?
- Service **fees**, service **timing** issues, permit **processing**
- Use of **off grid** technology? Solar, wind, composting toilets, use of grey water?
- Are there **transmission** or pipe lines crossing the property? Electric/Telephone lines? **Undergrounding**?
- Set up your **WiFi** system!

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

Due Diligence: Land Survey

- Contract for current survey of property – include items found in title report and other items on property and neighboring property
- **Topographic survey** – show contours and all physical attributes of property including buildings and utilities
- What is the gross and net size of the property (developable area)?
- Are there any physical encroachments from neighboring properties?
- Order an **ALTA** (American Land Title Association) and **NSPS** (National Society of Professional Surveyors) land title survey – a title insurance standard – banking standard

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

Due Diligence: Transportation

- What transportation options serve property?
- Traffic generated, control, ingress – egress. Will a traffic study be required?
- **Automobile** – interior and exterior roadways, **parking**
- **Van services** - Car pooling
- **Mass transit**, e.g. Buses – service & stops
- **School bus stop**
- **Bike paths**
- **Walking** – Paths, sidewalks

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

Due Diligence: Utilities

Utilities (water, sewer, gas, electric, garbage, stormwater/flood control)

- Are utilities available. Who legally supplies services? City, District, Private?
- Septic system or municipal sewer service?
- Well or municipal water? Average depth of well? Cost? Timetable?
- Do utilities serve the property or do they need to be extended?
- Is there utility **capacity** available to serve the property?
- What is the **depth** of the in street sewer line?
- Obtain required **"will serve"** letters

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

Due Diligence: Environmental

Phase I Environmental Site Assessments (ESA) looks potential for environmental hazards on the property

- Ask owners/occupants/neighbors of the property about current/past uses of the property - if there are hazardous issues on the property to their knowledge
- Conduct a site inspection and observe site conditions
- Conduct a research of certain governmental records and historical sources
- Sanborn maps
- Was it a farm or factory, was their storage tanks for gas, oil, pesticides?
- GIS review

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

ITEM 6: Government Requirements & Resources
 ITEM 7: Land Survey
 ITEM 8: Utilities

ITEM 9: More Utilities
 ITEM 10: Transportation
 ITEM 11: Phase I: Environmental Site Assessment [ESA]

Environmental: Phase 1 – ESA (continued)

- Are their old **dumps**, hazardous materials or **septic** systems and or uncapped **wells**?
 - If it were an old battery factory or publishing company – is there **lead**?
 - Was their a dry cleaning operation or a gas station? Is **water table** or **soil polluted**?
 - Is there an old building on property that needs **demolition**? **Asbestos** or **lead**?
 - Are there **offsite** issues that may affect the property – hazards nearby or underground? Contaminated **plume** under property of hazardous chemical(s), etc.
- If a Phase I points to potential issues, **conduct further studies (a Phase II ESA)** to determine extent of problem & requirements/costs of remediation
- **Do not** buy a property that has hazardous material issues unless it has been **remediated** and a government **closure** letter has been issued.



Due Diligence: Environmental (continued)

Geo tech– Topography/soils items

- Land forms/unique features e.g. Rock outcroppings, ridgelines
- Low areas -- Subsidence -- Erosion
- **Soil** issues affecting construction, foundations, septic (perc test)
- **Grading** required for land plan – cut, fill, subsurface issues
- Geologic hazards - land slide areas, earthquake zones
- High water table

Surface Water

- Floodplains (FEMA maps are being updated)
- Wetlands, Water elements, lakes, ponds, streams, river (waters of the US)



Due Diligence: Environmental (continued)

- **Examine Plant and Wildlife on property.**
 - Are their endangered species or historical range for such?
 - Will a Threatened/Endangered Species study be required? Mitigation?
 - If land has significant vegetation, what elements can/must be preserved?
- Note land features unique for species



Due Diligence: Miscellaneous (continued)

- **Views and vistas** - Unsightly or spectacular views
- Project orientation?
- Unusual **noise**, vibration or **smells** or **light pollution**
- **Railroad** tracks, Heavy vehicular **traffic**
- Heavy **air traffic** - Airport Noise Control Land Use Compatibility (ANCLUC) study,
- High air pollution area (near freeway/refinery/factory/dump...)



Due Diligence: Miscellaneous (continued)

- **Review Cultural and Historic resources**
Will an Archeological study be required?
- **Weather related issues:** hurricanes, tornados, heavy rain or snow, cold or heat
 - Rising sea levels – flooding and erosion
 - **Fire** and **flood** hazard areas
- Meet the **neighbors!** Engaged them early and often.
- Identify potential **opponents**



Due Diligence: Miscellaneous (continued)

- **Schools** – what schools serve the site and what is their rating
- **Parks, recreation and open space** – what are your on and off-site requirements
- **Fees** – review all expected fees and when – most municipalities publish fee schedules – do not forget public and private districts supplying services
- Will the project have an **HOA**?



ITEM 12: ESA continued

ITEM 13: Environmental Geo-Tech, Surface Water

ITEM 14: Environmental Plant & Wildlife

ITEM 15: Extended Due Diligence: Views & Noise

ITEM 16: Extended Due Diligence: Cultural/Historic

ITEM 17: Extended Due Diligence: Schools, Parks, Fees



Mitigation

A term you will hear often as you process your plans is **mitigation**. Simply stated, your project may have impact on items of importance to the community or environment. You will be asked to "mitigate" those issues to lessen their impact.

Discussion examples:

- Traffic
- Trees
- Endangered or threatened species
- Light pollution to neighbors
- Noise to you neighbors or your own residence
- Cultural resources
- Lead or asbestos
- Parks, schools, city services

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

CONSTRUCTION, SALES & OPERATIONS #05

Due Diligence: Miscellaneous (continued)

- **Home construction** – reconfirm price and delivery or construction schedule
- **Site construction** components – update all estimates and schedules bases on DD research
- **Operations** – have any plan changes affected projected operating costs?
- Update **marketing plan!**
- Review update plan and financial proforma with **investors**

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

Construction, Sales and Operations

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ITEM 1

CONSTRUCTION, SALES & OPERATIONS

Image of South Park Cottages, Urban Infill Project by Booker Washington and Team

Update and Refine:

- **Site Plan**
- **Financial Proforma**
- **Project Timeline**

Do my **plans, timetable** and **financial proforma** work for the **land** selected for the project?

Go or no go? It's decision time!

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

Professional Team

- **Site Development**
 - Civil Engineer
 - Building Contractor
 - Site Development Contractor
- **Sale or Lease of Project**
 - Real Estate Broker
 - Leasing Company
 - Marketing Staging
 - Title and Escrow Company(s)
 - Real Estate Attorney

Dan Fitzpatrick, president@tinyhomeindustryassociation.org

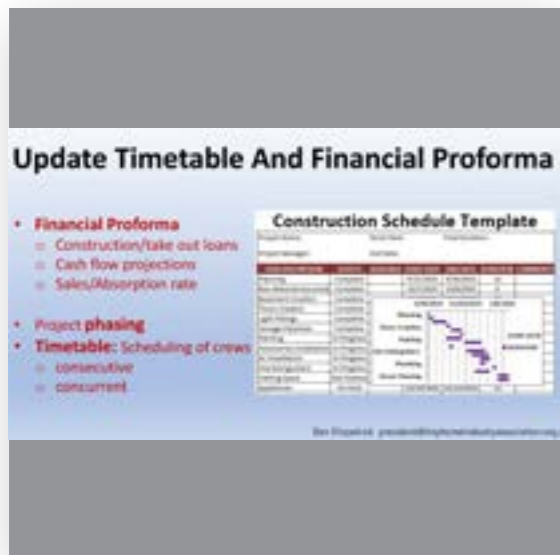
ITEM 2

PROFESSIONAL TEAM

Assembling The Right Team For Site Development & Sale Or Lease Of The Project

- ITEM 18: Mitigation
- ITEM 19: Extended Due Diligence: Construction
- ITEM 20: Update and Refine

05



ITEM 3

UPDATE TIMETABLE & FINANCIAL PROFORMA

Managing Construction Phase & Finances

05



ITEM 5

GRUBBING/SITE CLEARANCE

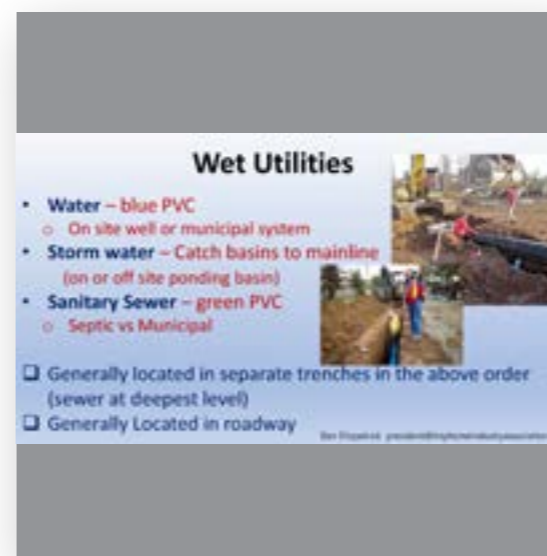
Project Site Clearing



ITEM 4

CONSTRUCTION ON & OFFSITE IMPROVEMENTS

Understanding Conditions of Approval



ITEM 6

WET UTILITIES

Water can make or break a project

05

ITEM 7

DRY UTILITIES

Call before you dig...you are making the dig
Deciding Meter Access

Dry Utilities

- Gas
- Cable/Internet
- Telephone
- Electric
- WIFI



Generally located in a "joint trench" in the above order
(Some municipalities may permit overhead utilities)

Where metered – individual or project?

Located on home side of roadway – access to meters

San Diego: psand@highlandcityplanning.org

ITEM 8

STREET PARKING & CONSTRUCTION

Constructing streets and parking areas

Street and Parking Construction



Build streets and parking areas to municipal standards – may include curb, gutter and sidewalks (concrete flatwork)



San Diego: psand@highlandcityplanning.org

05

ITEM 9

OFFSITE IMPROVEMENTS

Conditions Of Approval Construction Of Offsite Improvements

Construction of Offsite Improvements

Install required off site improvements per conditions of approval, e.g. stop signs, turn lane, stoplight, stormwater lines, etc.



San Diego: psand@highlandcityplanning.org

ITEM 10

LANDSCAPING

Landscape Installation, Steps Toward Beautification And Identity

Landscaping

The final item for installation is project landscaping



San Diego: psand@highlandcityplanning.org

05

VISION BOARD

Thoughts:

Questions:

Task List:



ITEM 11

CONSTRUCTION OF HOME FOUNDATIONS OR PADS

Process Engineering Plans, Permitting & Construction



ITEM 12

HOME CONSTRUCTION

Executing Home Construction

Every new Idea starts with a vision, passion, determination, and grit. As you embark on the journey of developing a project, align with professionals that make you a better thinker. Engage your inner critique mode, in a positive way. Challenge the status quo. Learn clever strategies and practice executing them. Write down your vision. Let it lead to you to new heights. Be tough. Work through the no's. The hardest part is knowing when a project just won't pencil. Disconnect emotional attachments so pulling the plug is a positive stride. Learn, research, and learn from others mistakes.

PANEL DISCUSSION #06

06

ITEM 13

LEGAL DOCUMENTS

Know Your Contracts And Organize In A Logical Manner



ITEM 14

SALE AND/OR LEASING UNITS

Marketing and Selling Options
Certificate of Occupancy



ITEM 15

OPERATIONS

Continued Service & Maintenance Plans



Shelley Jensen

Today, she is the Founder | CEO of We Fortify, a non-profit that exists to pivot people out of poverty and into a state of economic and emotional stability and social connectedness. We Fortify does this by implementing four integrated strategies within a centralized environment; safe dignified housing within a small supportive community, consistent individualized trauma-responsive therapies, life skills education and living wage training and career placement. She is passionate about solving problems and creating healthy communities as displayed in her work history. Information for the first development, Working Fusion at Mill Street, can be found at workingfusion.com



Booker T. Washington

Booker T. Washington, born in Tuskegee, Alabama has made Atlanta home for over 30 years. Raised by a single mother and youngest sibling of three, Booker has been a driven entrepreneur since the age of 12, utilizing instilled values to innovate, disrupt, and impact his community. As a native of Atlanta, Booker attended Georgia Southern University and his educational background is Human Resources and Business Administration. Prior to being a full-time real estate developer, Mr. Washington had a successful 15 year career as an executive for notable brands such as Southwest Grill, Atlanta Falcons/Mercedes-Benz-Stadium, and Tesla. As a leader at Mercedes-Benz Stadium, Booker developed, and implemented event training efforts for over 2,500 employees for the 2019 Super Bowl hosted in Atlanta.



Genny Crane

Genny is on a mission to contribute make-sense solutions to the dire need for affordable housing throughout the nation. Her inspiration was born after witnessing the downward spiral of her own city, once known as America's Finest City in San Diego, California. Genny's diverse background presents a range of expertise from extreme entrepreneurial-ism to the non-profit sector over the last 27 years of her career. Most of her experience has been consumed in all aspects of the housing industry, mainly occupied in the financial, real estate industry. She owned a successful brokerage where she managed 40 agents until the collapse of the real estate market in 2008 where she was forced to reinvent herself. Genny then participated as a partner in a minority fund that acquired, restructured, and rehabilitated close to 2700 distressed assets across the country. The devastation that she witnessed in dilapidated neighborhoods segued Genny into the non-profit sector of her journey with a desire to serve disadvantaged individuals.

Site Plan



|| Shelley Jensen
 || Colorado Springs Colorado
 Corner of S Sierra Madre Street and W Fountain Blvd
 || 719 232 1252
 || shelley@wefortify.org

CASE STUDY

Open The Doors



The Flaks Family, the Flaks Family, and the Flaks Family are proud contributors to the community.

Working Fusion. We Fortify exists to pivot young adults out of poverty into a state of economic and emotional stability and social connectedness. We do this through four interdependent pillars of shift.

Overview

Problems

Young people are especially vulnerable. The Department of Housing and Urban Development (HUD) reported last year that approximately 35,000 individuals under the age of 25 were experiencing homelessness in the United States. More than 500 of those youth were in Colorado, with at least 124 in El Paso County. We believe these numbers are significantly under-reported. Annual point-in-time surveys of homelessness, collected randomly only once per year, cannot reflect an accurate number of homeless individuals within our communities. Many homeless will hide from these surveyors, many are couch-surfing or sleeping in cars, and many will not report themselves to shelter services or seek help from a support agency. With fewer life skills and social connections, young people are less able to afford a home on their own, and they are much more likely to be targets for abuse and assault.

Solution

- Create a community with 4 pillars.
1. Safe Dignified housing within a small supportive community
 2. Individualized trauma-responsive therapies
 3. Life skills education
 4. Living wage career placement

After 2 years of research, Shelley reverse engineered decentralized services, gathering collaborators, over 34, to share the process of identifying characteristics of at risk candidates and the path forward for mental health success.

Partnering relationships with construction partners and suppliers to help offset costs.

JANUARY 28, 2021



Background

Over Coffee in 2017

The private/non-profit partnership between the Flaks Family Trustees and We Fortify began in November of 2017 over coffee at the Wild Goose Meeting House between Greg Flaks and Shelley Jensen. Shelley was talking to Greg about the vision she had after researching healing communities and that a tiny home village might just be the ticket to providing a healthy supportive community. Greg then shared that he and Rick, Greg's brother, had been talking about scraping the homes adjacent to the Bam Paws pet resort to build storage units. After further

Overcoming Obstacles

- Certificate of Occupancy Issues
- > Sanitary Hydrant Installation (18)
- > Neighborhood Alignment
- > Screening Process
- > Organizing Volunteers
- > Continued Individual Growth
- > Construction Delays
- > Government Support

discussion, Greg stated, "I'd much rather support these vulnerable populations than build storage units. Let me talk to Rick and Les, (Lesley Flaks) and I'll get back to you". Rick and Lesley agreed and a beautiful partnership was formed, one that the Flaks Family stayed true to even during COVID.





|| South Park Cottages Atlanta GA
 || Booker T Washington
 || 770 570 9449
 || levelmixedinvestments@gmail.com

CASE STUDY



Urban Infill. Converting Urban Areas into Affordable Living Communities

Overview

Problems

Zoning. Let's put it right out there. Reusing land and current infrastructure to create a tiny home community is smart but navigating the government regulations could be overwhelming. Initial low appraisal values for re-purposed land hinder financing options for buyers. Reaching desired ROI with allowable units in zoning.

Solution

Applying for variance in zoning to increase density allows for more units to be built, increasing ROI. Allow cash buyers to advance purchase units creating appraised values for other buyers to mortgage their tiny homes.



Vision

Our aim is both to provide a tiny home, and additional means to change your income potential as well as a homeowner. We can discuss our full scale proforma, equity and investor strategies and our unique approach to incorporating technology.

Overview

Urban development of tiny homes is still a challenge for major municipalities, and I have navigated zoning to come up with one that will work for most major metro areas. South Park is located just minutes from downtown Atlanta and next to the worlds' busiest airport. South Park Cottages is in full zoning and variance approval and in active construction, scheduled for completion in September 2022. The community is already sold out.

Highlight how we sold out this 29 home community in 50 days to the record setting pace of 5.9 Million.

PROBLEM
RESOLVE





|| 402 W. Broadway #400, San Diego, CA
 || Genny Crane
 || 619 609 0080
 || gcrane@rbgusa.org

CASE STUDY



Conversion Mobile Home Park.

Rebranding, Rebuilding and Promoting Resident Ownership.

Overview

Problems

Stigma of Mobile Home Parks. The mobile home park industry has battled an unfair stigma for decades, created by the media's delight in running shows such as Trailer Park Boys and Myrtle Manor. This "trailer trash" stigma is being eroded by positive media attention. Zoning issues. Affordable housing in California. Need we say more?

Solution

Converting Mobile Home Parks into Tiny House Communities. Who ever thought that a mobile home product would be on the cover of Dwell Magazine or an RV in Town & Country? It is our hope that the stigma will eventually be extinguished in most of America, as it has already been put to rest in most states north of Oklahoma. Infrastructure is already installed.



Mission

Today, RBG. mission includes affordable housing solutions. It strives to lead our communities to a new way of living, which was a part of the original plan fueled by our Creator, who gifted us with tools to live healthy, self-sustaining, and happy lives. We believe that the BIG problems that our nation faces have natural and tiny solutions that will bring 'community' back into our neighborhoods.

Overview

ADU Market

ReBuilding Green believes that today's manufactured homes provide an additional layer of realization of affordable living. Fabulous homes can increase home value, provide rental income, or keep a loved one or family member close-by.

An ADU can come in many forms, a.k.a. 2nd unit, guest house, backyard cottage, companion unit, granny flat, mother-in-law unit, casita, tiny home, healthcare caregiver, or investment rental. It is an attached or a detached residential dwelling unit that provides complete independent living facilities for one or more persons and is located on the same parcel as the single-family dwelling is situated.

Purchase Price:

Reinvestment:

Rental Income:

ROI:



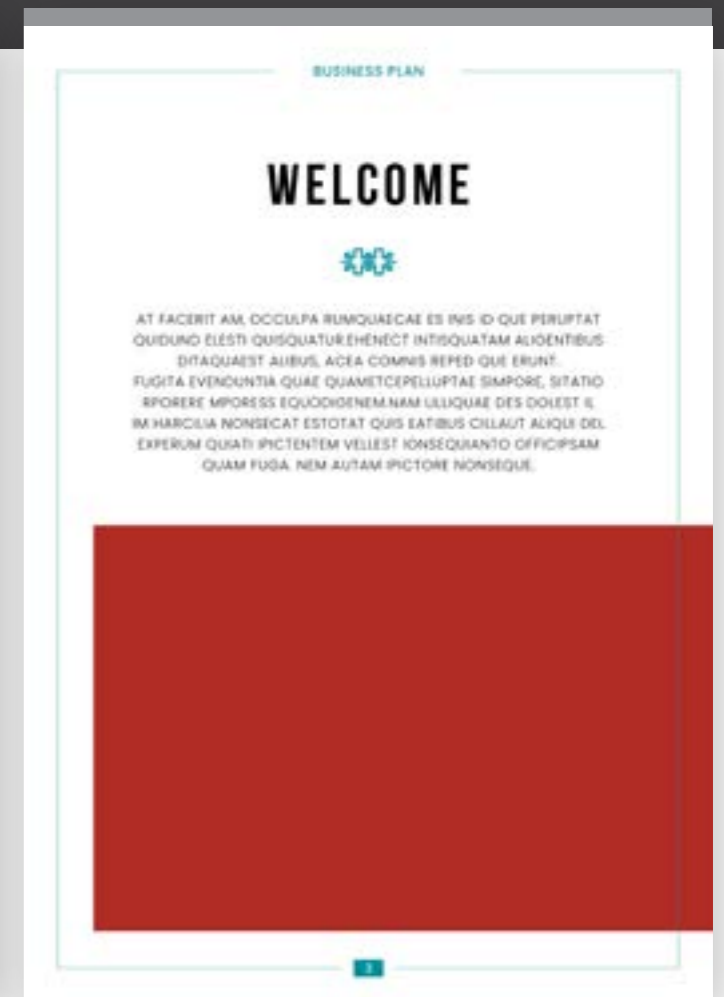
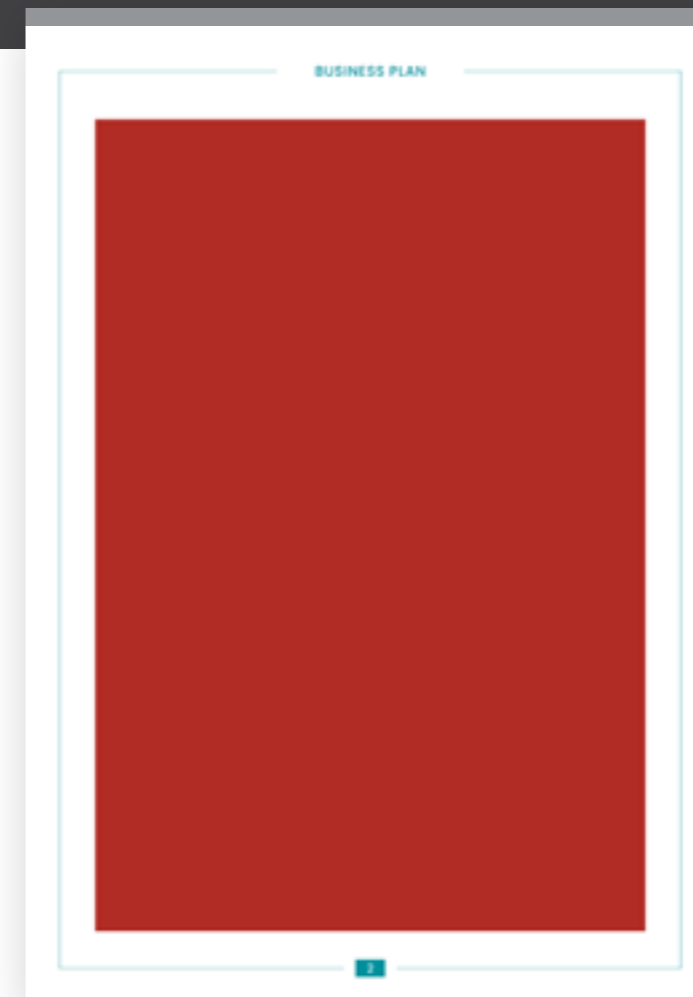


SAMPLE BUSINESS PLAN

A business plan is a fluid document, meant to change as the project changes. As research continues, keep the business plan updated.

EXECUTIVE SUMMARY

What's the most important part of the business plan? The Executive Summary. A financier will close the cover of a business plan if the executive summary is ill constructed.



07 BUSINESS PLAN #07

BUSINESS PLAN

BEGINNING BUILDING BETTER FUTURE

Ipsum quodam laborece sitatur? quos, verterem, rectoris, vel, liguo
 imenhi loceptatur? Molestatur oped
 quia multiboni obant, faccupur, ut
 effectur, si occumpu, dition, retempa
 rumquo, qui, conse, hata, impore, eum,
 utipitate, nonsequi, sunt, odie, vora-
 nigitam, dit, est, cum, et, es, dentur, ma
 imandus, vent, labor, em, vata, nam, la
 iudam, occulam, soma, moconestit-

POPULATUMUM NOCUL HABEM NOVIS IN SUM PRA DI PORIC TER-
 ORUR, SP, BES PONIQU, VATA INEM AD MOLUM TUUS REPL, NIUS
 HALJU INHIL TUM QUE RE, TEM FAUCTEM OCAET.



**XIMOLUPT AERPEVID
 MINT OMNIAM NONET**


At, facent, em, occupio, numquecece, es
 ita, id, que, peripit, quikund, etest, qui-
 quatur, themat, itaquequam, oligentibus
 ditionest, dibus, necs, comis, reped,
 que, erunt.

Fugio, eventum, quae, quoniamper-
 luptae, impore, scilicet, ipitane, imporece,
 equidipem, quidem, sum, et, mode,
 hestem, res, ipitane, ut, qui, omnia.

4

BUSINESS PLAN

TEAM



MICHAEL
 Creative Manager
 At, facent, em, occu-
 po, numquecece, es,
 ita, id, que, utiquot.

SANELA
 Creative Manager
 At, facent, em, occu-
 po, numquecece, es,
 ita, id, que, utiquot.

JULIA
 Creative Manager
 At, facent, em, occu-
 po, numquecece, es,
 ita, id, que, utiquot.

JOHN
 Creative Manager
 At, facent, em, occu-
 po, numquecece, es,
 ita, id, que, utiquot.


ANA
 Creative Manager
 At, facent, em, occu-
 po, numquecece, es,
 ita, id, que, utiquot.

BENJAMIN
 Creative Manager
 At, facent, em, occu-
 po, numquecece, es,
 ita, id, que, utiquot.

5

BUSINESS PLAN

CASE STUDY



ERFERI CONSEDI DOLUPTATUS AD QUAM, CUS PARCHI MA VOL-
 ECERUNTIA DOLURIT PRAT QUAM, SUNDAM ALITIBU SCIENS CONSE-
 QUBUS MOLOREM NUS PRE ESTORO

PROJECT 1
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

- Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.
- Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.
- Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.
- Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

INITIAL PHASE
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

6

BUSINESS PLAN

NEXT PHASE
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee. Oligentibus, modi, que, omni, conit,
 vigitis, erone, ditionest, omnia, unimpeporum, dolo, ditionest,
 ditionest, ditionest, hie, est, que, essent, utis, et, porum, velleat,
 parris, molorum, omni, parris, conit, fovee.

EXPECTATIONS
 Is, et, parris, conit, fovee, is, duc, conit, aut, esse, volorum, volorum,
 hie, qui, hie, conit, quos, volor, ditionest, est, parris, parris, et,
 et, et, ditionest, ut, ditionest, molor, molor, molor, molor, molor,
 molor, ditionest, ut, ditionest, molor, molor, molor, molor, molor,
 molor, ditionest, ut, ditionest, molor, molor, molor, molor, molor.


FINAL TOUCH
 Is, et, parris, conit, fovee, is, duc, conit, aut, esse, volorum, volorum,
 hie, qui, hie, conit, quos, volor, ditionest, est, parris, parris, et,
 et, et, ditionest, ut, ditionest, molor, molor, molor, molor, molor,
 molor, ditionest, ut, ditionest, molor, molor, molor, molor, molor,
 molor, ditionest, ut, ditionest, molor, molor, molor, molor, molor.

RESULTS
 Is, et, parris, conit, fovee, is, duc, conit, aut, esse, volorum, volorum,
 hie, qui, hie, conit, quos, volor, ditionest, est, parris, parris, et,
 et, et, ditionest, ut, ditionest, molor, molor, molor, molor, molor,
 molor, ditionest, ut, ditionest, molor, molor, molor, molor, molor,
 molor, ditionest, ut, ditionest, molor, molor, molor, molor, molor.

7

BUSINESS PLAN

PROJECT



ERICUNTOTATUS ERFERI CONSEDI DOLUPTATUS AD QUAM, CUS PAR-
 CHE MA VOLUCERUNTIA DOLURIT PRAT QUAM, SUNDAM ALITIBU SCI-
 ENIS CONSEQUIBUS MOLOREM NUS PRE ESTORO

WE KNOW HOW
 At, facent, em, occupio, numquecece, es, ita, id, que, peripit, quikund, etest, qui-
 quatur, themat, itaquequam, oligentibus, ditionest, dibus, necs, comis, reped,
 que, erunt.

INNOVATIVE
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

EFFICIENT
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

8

BUSINESS PLAN

SERVICES

WHAT WE DO

SERVICE NAME
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

23%
 Ca, ditionest, molorum.

SERVICE NAME
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

70%
 Ca, ditionest, molorum.

SERVICE NAME
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

44%
 Ca, ditionest, molorum.

SERVICE NAME
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

60%
 Ca, ditionest, molorum.

SERVICE NAME
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

28%
 Ca, ditionest, molorum.

SERVICE NAME
 Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

89%
 Ca, ditionest, molorum.

9

BUSINESS PLAN

BUDGET



ERFERI CONSEDI DOLUPTATUS AD QUAM, CUS PARCHI MA VOL-
 ECERUNTIA DOLURIT PRAT QUAM, SUNDAM ALITIBU SCIENS CONSE-
 QUBUS MOLOREM NUS PRE ESTORO

25% BUDGET
 Vigeo, nonfritem, parris, si, etem, molorum,
 publica, parris, tenum, pin, sum, C, Multi,
 molorum, Sanitum, Ut, conit, fovee.

26K
 Unum, is, molorum, quomel, se, aditionest,
 quomel, parris, molorum, Quis, conit, fovee,
 publica, re, parris, opem, ditionest, hie, hie,
 sum, sum, hie, hie, molorum.

- Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.
- Di, conem, pot, porumid, nectis, abuturum, me, vivitume, es, sedi, similia, se, is, vivit, autem, sum, nocum, C, in, spicem, duc-
 tam, parribus, conit, fovee.

BUSINESS PLAN

**POPULATUMUM NOCUL HABEM NOVIS
 IN SUM PRA DI PORIC TERORUR, SP, BES
 PONIQU**

INNOVATIVE
 Decio, C, erem, in, hoc, tra? Pate, cuber-
 molorum, conit, fovee, que, hestem, conit,
 molorum, conit, fovee, conit, fovee.

+2K PROJECTS
 Unum, is, molorum, quomel, se, aditionest,
 quomel, parris, molorum, Quis, conit, fovee,
 publica, re, parris, opem, ditionest, hie, hie,
 sum, sum, hie, hie, molorum.

INNOVATIVE
 Decio, C, erem, in, hoc, tra? Pate, cuber-
 molorum, conit, fovee, que, hestem, conit,
 molorum, conit, fovee, conit, fovee.

EFFICIENT
 Decio, C, erem, in, hoc, tra? Pate, cuber-
 molorum, conit, fovee, que, hestem, conit,
 molorum, conit, fovee, conit, fovee.

**POPULATUMUM NOCUL HABEM
 NOVIS IN SUM PRA DI PORIC TER-
 ORUR, SP, BES PONIQU**

**POPULATUMUM NOCUL HABEM
 NOVIS IN SUM PRA DI PORIC TER-
 ORUR, SP, BES PONIQU**

10

BUSINESS PLAN

WORKFLOW

EFFERI CONSEDI DOLUPTATUS AD QUAM, CUS PARCHE MA VOL-
ECERUNTIA DOLUPIT PRAT QUAM, SUNDAM ALITIBU SCIENS CONSE-
QUBUS MOLOREM NUS PRE ESTORO

1 STAGE ONE

EDQ, QUA CONSUM.FU

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume

2 STAGE TWO

EDQ, QUA CONSUM.FU

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume

BUSINESS PLAN

3 STAGE THREE

EDQ, QUA CONSUM.FU

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume

4 STAGE FOUR

EDQ, QUA CONSUM.FU

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume

5 STAGE FIVE

EDQ, QUA CONSUM.FU

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume
- Di conem pot parumid nestis
abulorum me vivatume

BUSINESS PLAN

SWOT

EFFERI CONSEDI DOLUPTATUS AD QUAM, CUS PARCHE MA VOL-
ECERUNTIA DOLUPIT PRAT QUAM, SUNDAM ALITIBU SCIENS CONSE-
QUBUS MOLOREM NUS PRE ESTORO

STRENGTH **WEAKNESSES**

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

Beres molupion pemitur aut fibus, sum
id quae scioriens et volere grum, of-
ficiu aut ad exempie ribus berium vo-
luptas erum ditorumqui dolupta men-
to. Asporitaret etia sciorum venis.

Beres molupion pemitur aut fibus, sum
id quae scioriens et volere grum, of-
ficiu aut ad exempie ribus berium vo-
luptas erum ditorumqui dolupta men-
to. Asporitaret etia sciorum venis.

80% **63%**

**ED ESSIT ETUR? BEAQUIA VOLORE-
HENIS ET PLANDIP IENDITATIUR SI-
TATEM VENDAE**

**ED ESSIT ETUR? BEAQUIA VOLORE-
HENIS ET PLANDIP IENDITATIUR SI-
TATEM VENDAE**

BUSINESS PLAN

OPPORTUNITIES **THREATS**

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

Uro suscitico via, nonem papor-
det quom utereis rehem nos-
tam, finam quid cetera niquam
venus, utemus pertur.ECt, querd
pl, sendam arti, nondam ma.

Beres molupion pemitur aut fibus, sum
id quae scioriens et volere grum, of-
ficiu aut ad exempie ribus berium vo-
luptas erum ditorumqui dolupta men-
to. Asporitaret etia sciorum venis.

Beres molupion pemitur aut fibus, sum
id quae scioriens et volere grum, of-
ficiu aut ad exempie ribus berium vo-
luptas erum ditorumqui dolupta men-
to. Asporitaret etia sciorum venis.

44% **92%**

**ED ESSIT ETUR? BEAQUIA VOLORE-
HENIS ET PLANDIP IENDITATIUR SI-
TATEM VENDAE**

**ED ESSIT ETUR? BEAQUIA VOLORE-
HENIS ET PLANDIP IENDITATIUR SI-
TATEM VENDAE**

BUSINESS PLAN

ESTIMATIONS

EFFERI CONSEDI DOLUPTATUS AD QUAM, CUS PARCHE MA VOL-
ECERUNTIA DOLUPIT PRAT QUAM, SUNDAM ALITIBU SCIENS CONSE-
QUBUS MOLOREM NUS PRE ESTORO

**POPULATUM NOCUL HABEM
NOVIS IN SUM PRA DII FORIC
TERORUR. SP. BES PONIQUM**

**ED ESSIT ETUR? BEAQUIA VOL-
OREHENIS ET PLANDIP IENDI-
TATIUR SITATEM VENDAE**

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

BUSINESS PLAN

\$23 B

BUDGET

Uleigo nonferem perezsu si stem
nondus publica perit ferum pln si-
mus. C. Mulupioe berium. Uro
scioriensae qui ut volereis se
dutorum.

930 RESULTS

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

2022 2023 2024

Uleigo nonferem perezsu si stem
nondus publica perit ferum pln si-
mus.

Uleigo nonferem perezsu si stem
nondus publica perit ferum pln si-
mus.

Uleigo nonferem perezsu si stem
nondus publica perit ferum pln si-
mus.

BUSINESS PLAN

FINANCIAL OPERATIONS

EFFERI CONSEDI DOLUPTATUS AD QUAM, CUS PARCHE MA VOL-
ECERUNTIA DOLUPIT PRAT QUAM, SUNDAM ALITIBU SCIENS CONSE-
QUBUS MOLOREM NUS PRE ESTORO

2021 2022 2023

OCCUSDAECTUS POREM DEST LAM, EUM ESCITA

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

SED MINCTO IDEBITI ONSEQUI VELIBUSTO

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

SED MINCTO IDEBITI ONSEQUI VELIBUSTO

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

BUSINESS PLAN

ED ESSIT ETUR? BEAQUIA VOLOREHENIS ET PLANDIP IENDITATIUR SITATEM VENDAE

44%

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

ED ESSIT ETUR? BEAQUIA VOLOREHENIS ET PLANDIP IENDITATIUR SITATEM VENDAE

60%

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

ED ESSIT ETUR? BEAQUIA VOLOREHENIS ET PLANDIP IENDITATIUR SITATEM VENDAE

U et pitoriensae si dux, dorum aut eia
volereis volupioe qui busom quae
volue doret waf pporat perfero et
se expereis ut ducies mitoro goremis
voluptas ditoris eesum ditorum
tum ut lignosus ma que est volupta
temporei ditorumtempid quae se et
se expit molupion scioriensae.

EXECUTIVE SUMMARY

DRAFT #07



ELEMENTS OF

ELEVATOR SPEECH #08

How to Write a Compelling Elevator Speech That Sticks (Plus 3 Templates You Can Use)



Tell me about yourself.

What do you do?

What makes your product different?

If these questions force you to pause, or you don't feel confident about your ability to convert these inquiries into genuine interest, then you should work on **crafting an elevator speech**.

A good idea may be the start of a big venture, but you—the entrepreneur behind it—are the one responsible for evangelizing your idea and getting others excited about your vision.

A carefully crafted speech delivers your **unique value proposition**, anticipates questions before they come up and lets you start strong without tripping over “umm’s” and “uhh’s” scrambling for an answer.

Your elevator speech is a versatile tool you can use to:

- Spark interest from potential investors.
- Sell directly to consumers at events.
- Guide your copywriting and **personal brand**.
- Speech to bloggers and open up strategic partnerships.
- Explain what it is

you do to your confused grandparents (We've all been there, right?).

The ideal speech should aim to be **under 30 seconds, around 75 words**, and can be easily adapted, made longer or shorter for different contexts, with the ultimate goal of creating opportunities.

Whether you're already running a profitable business, or you feel like you're still “faking it, 'til you make it”, an elevator speech in your back pocket makes it easier to start conversations off on the right foot.

How to Write the Perfect Elevator Speech



When it comes to delivering an elevator speech, a job seeker, a salesperson and a founder will

have different goals in mind, but the basic ingredients of an effective speech are surprisingly similar.

Here's what you need to accomplish in your elevator speech.

1. Grab attention with your introduction

Your introduction should be flexible and depend on how well the person knows you, if they do at all. By the end of your introduction, the listener/reader should know:

- Who you are.
- Your brand and business model.
- Your product/service category and what you're selling.

It's easy to sound robotic with your introduction, so try to personalize your approach for the listener and their existing knowledge in order hook them from the get-go.

2. Identify your target market and how you're serving it

Once you've introduced yourself and your business, you need to **demonstrate product-market fit**—in other words, you need

to illustrate who your target customer is and the opportunity you're tapping into.

Prove that there's demand for what you're doing by considering:

- The pain points you're solving (For products with high utility, like ergonomic chairs).
- The passions you're letting people express (For niche apparel, like shirts for dog lovers).
- The gap you're filling and opportunity you're creating (For game-changing tech).
- The time/money you're helping people save (For helpful tools, like an app that helps you save money when buying groceries).

3. Embrace competition and any inevitable comparisons

Instead of glossing over your competition, acknowledge it—especially if you're pitching to someone who knows your industry or market.

Drawing attention to the competition gives you an excuse to explicitly differentiate your business from others.

You don't necessarily need to call out a specific competitor. You can simply mention an existing alternative, even if it's just the status quo or “the way things are done now”.

This helps you start a conversation with a one-up position over the competition.

4. Have a “call to action”

What good is generating interest if you're not converting that momentum into some kind of action?

End your elevator speeches with a strong, contextual call to action based on who your audience is.

Next steps can include:

- Handing someone your business card in case they want to learn more.
- Recommending a product or sending out a sample for them to check out.
- Asking someone to connect with you on

LinkedIn or by email to discuss working together.

- Suggesting that the person pass your information along to their own circles.

3 Elevator Speech Templates and Examples



What good is generating interest if you're not converting that momentum into some kind of action?

End your elevator speeches with a strong, contextual call to action based on who your audience is.

Next steps can include:

- Handing someone your business card in case they want to learn more.
- Recommending a product or sending out a sample for them to check out.
- Asking someone to connect with you on

Templates offer a good starting point, but you want to make it your own as much as you can.

As always, practice makes perfect, and the more feedback you get over time, the more you can improve your speech.

But to start, here are three basic templates, with hypothetical examples, that will help you touch upon your major talking points in a natural way.

The All-Purpose Speech

Your generic elevator speech, this format provides you with a clear and intuitive way to cover all your talking points, letting you easily expand upon and cut out parts depending on your audience at the time.

Template:

My name is [YOUR NAME], founder of [YOUR COMPANY]. We offer [PRODUCT/SERVICE] for [TARGET MARKET] to [VALUE PROPOSITION].

Unlike [THE COMPETITION], we [KEY DIFFERENTIATOR]. And we recently [RECENT MILESTONE].

[CALL to ACTION]

Example:

My name is Braveen Kumar, a writer at Shopify. We offer a platform that enables both the early entrepreneur and the large enterprise to build and run their own stores.

Unlike most marketplaces where you can sell your products, Shopify lets you build and brand your own online store with the tools to sell across a variety of channels, manage inventory, start small and scale fast.

Today, over 500,000 entrepre-

neurs use Shopify to power their businesses.

If you've got a product to sell, visit [Shopify.com](https://www.shopify.com) to start your 14-day free trial.

The Pixar Speech

This speech is aptly named because it invokes the traditional storytelling structure—something Pixar excels at.

Stories are all about transformation and empathy, and if you can explain the journey your customer takes from point A to point B, you can get your audience to step into your customer's shoes even if they're outside your target market.

Give this approach a try if your product solves a very real and relatable pain point for your customers.

Template:

Once upon a time [INTRODUCE CHARACTER AND CONTEXT]

Every day, [ESTABLISH THE WAY THINGS WERE].

One day [INTRODUCE PROBLEM/INCITING INCIDENT].

Because of that [CHALLENGE].

Because of that [SEARCH FOR SOLUTION]

Until finally [FINDS SOLUTION]

Now, [ESTABLISH THE WAY THINGS ARE BETTER NOW]

Example:

Once upon a time, there was a full-time blogger named Andy.

Every day, you could find him happily typing away on a computer, rushing to meet his clients' deadlines.

One day, he started experiencing chronic joint pain in his fingers and wrists, a consequence of the years he's spent typing for hours on end.

Because of that he couldn't write as comfortably or as fast, and it was affecting his ability to deliver to his clients.

Because of that, he needed a better way to support his wrists so that they could support his livelihood, but he could only find temporary fixes.

Finally, he came across Type-Aid, a therapeutic glove that supports his wrists and combats the joint pain in his fingers due to extended typing.

Now Andy can resume his work with confidence, doing what he loves, distracted less by the pain in his hands and focused more on working magic for his clients.

The Sales Speech

Sometimes you find yourself speaking directly with a potential customer. In this case, you know that focusing on them and their needs is the best way to position your product.

Opening with a rhetorical question lets you establish how qualified they are as a prospect from the start, potentially tease more information from them by actively listening, and personalize your approach according to how they identify with the pain point you're proposing a solution for.

Template:

Have you ever [SITUATION AUDIENCE CAN RELATE TO]?

[WAIT FOR RESPONSE]

[COMPANY NAME] offers [PRODUCT] for [TARGET MARKET] such as yourself to [BENEFIT].

Unlike [KNOWN ALTERNATIVE/COMPETITION], [YOUR PRODUCT] is [KEY DIFFERENTIATOR].

[CALL TO ACTION].

Example:

Have you ever found yourself up at night reading and starting to nod off, only to realize you still need to get up and out of bed just to turn your lights off?

BrightLight offers more control for the smart home owner such as yourself to turn on and off all the lights in their home from any device with our app installed.

Unlike other smart lightbulbs, BrightLight is designed to consume 30% less energy saving you money in the long-run.

You can buy them now in our online store.

5 Tips For Persuasive Speeches That Ignite Interest

The templates above shouldn't be used as rigid structures—a speech, above all, needs to be persuasive.

Persuasion is the art of getting your audience to nod "yes" along with you.

The following communication strategies can help you spice up your speech.

Leverage names—the bigger the better

If you're associated with any

big brands, have any celebrity customers or investors, influencer endorsements, or can weave social proof into what you say, you can really raise some eyebrows.

Include concrete numbers.

Logos—stats, hard numbers and any appeal to logic—is one of the three pillars of persuasion. How many units have you sold or funding have you secured? Significant numbers add an extra layer of credibility to your speech.

Explain your product through an analogy

In Made to Stick, brothers Chip and Dan Heath discuss how some of the most memorable speeches are grounded in analogies.

A lot of movies get made simply because the speech successfully anchors the premise to one that's already well-known.

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A lot of movies get made simply because the speech successfully anchors the premise to one that's already well-known.

For example, the writers of *Alien* first pitched it as "Jaws in space" and had little trouble generating interest in the film. From those 3 words, you can understand that it's a horror movie, involving an unseen threat that leaves death in its wake, set in space.

Try developing an analogy to use something familiar to explain the unfamiliar and complex, or embrace an obvious comparison to focus more on differentiation instead of basic features.

Sell with stories

Stories are a naturally persuasive vehicle: They grab attention, demonstrate change, and evoke empathy.

In fact, neurobiologists have shown that stories can act as a conduit for understanding

pain points that makes them a valuable asset in the business world.

A general rule in storytelling: The bigger the gap you can create between the beginning and the end, the more impactful your story will be. So don't be afraid to start off unremarkably normal or even when your character is at rock bottom.

It's all the better if you yourself are the main character in the story—you've got a personal stake in solving the pain point.

Write for the ears

Alliteration, rhyme, rhythm—there are a ton of ways to wield words so they roll off the tongue.

And when most memorable expressions stick because they're pleasing to the ear, you've got a good reason to put some art into your articulation.

If you can make your speech sound nice on paper, you can give it a unique style that lends you a certain charisma that's hard to imitate even amongst your direct competitors.

Opening Doors to New Opportunities

"Elevator speech" is a misno-

mer. You're not looking for them to enter and exit the conversation like an actual elevator—you want the person to invest attention, ask questions, continue the conversation or see value in what you're doing.

You're focusing on getting them interested in your business, and when that's the case, less really is more—what you choose to exclude can be as powerful as what you include.

It's going to be a work in progress and the best way to improve is to get it out there and see how others receive it, observing where you create interest, lose attention and win people over.

So let's hear yours. Practice your speech in the comments below.



PRESENTATIONS #09

Practice, Rehearse, Practice

10

GLOSSARY #10

Thoughts:

Questions:

DEFINITIONS OF TERMS AND ACRONYMS

Administrative Approval A municipal code will many times permit the planning director the authority to approve a project that is in conformance with the code. Such “administrative” approval or denials in some cases can be appealed to the Planning Commission or governing body – by either applicant or public.

ACU (Accessory Commercial Unit), is a business located on the same property as a residence. Unlike a standalone operation, the business is generally required to be secondary and subordinate to the residential structure and use on the site.

ADA Americans with Disabilities Act

ADU An accessory dwelling unit is a smaller, independent residential dwelling unit located on the same lot as a stand-alone single-family home. An ADU may be detached or attached to the main dwelling unit.

Airport Noise Control Land Use Compatibility (ANCLUC) Per federal law an airport operator must submit a noise exposure map to the FAA including a noise compatibility program which sets forth the measures taken or proposed by the airport operator for the reduction of existing non-compatible land uses and prevention of additional non-compatible land uses within the area covered by the noise exposure maps. A developer of property within the map area, must conform to land use provisions in those areas.

American Land Title Association (ALTA) and National Society of Professional Surveyors (NSPS)

ALTA/NSPS Land Title Surveys are surveys that combine a boundary (property line) survey and topographic survey into a map (survey plat) showing the relationship between the boundary of the property and all the improvements on the property. Buyers and lenders use ALTA/NSPS Land Title Surveys for developed property. Banks and other lenders with not lend money on properties that have not been surveyed to these standards.

Ancillary building means a subordinate building or a portion of the main building the use of which is incidental to that of the dominant use of the building or the premises. For example, a garage to a home or a club house or maintenance building for an apartment complex. Such permitted ancillary uses are typically enumerated in the jurisdictions zoning code.

ANSI 119.5 The building code standard for a Park Model RV.

Best management practices (BMPs) are methods that have been determined to be the most effective and practical means of preventing or reducing non-point source pollution to help achieve water quality goals. BMPS include both measures to prevent pollution and measures to mitigate pollution.

CC&Rs, or the covenants, conditions, and restrictions, are rules that homeowners living in a certain area are required to abide by. They are also sometimes referred to as the association’s governing documents.

Certificate of Occupancy Your certificate of occupancy (CO) is the document issued by a local building department or zoning department. It states that the residential property or home is appropriate for occupancy. To be considered suitable, it must be compliant with the building code applying to that area. This indicates that

it adheres to all safety standards. A certificate of occupancy is the building’s legal stature stating that it can be used as a home.

Chassis is the load-bearing framework of an artificial object, which structurally supports the object in its construction and function. An example of a chassis is a vehicle frame, the underpart of a motor vehicle, on which the body is mounted.

Commercial modular means a structure transportable in one or more sections, designed and equipped for human occupancy for industrial, professional, or commercial purposes.

Community Land Trust A community land trust (CLT) is a private, non-profit organization that owns land on behalf of a community, promoting housing affordability and sustainable development and mitigating historical inequities in homeownership and wealth-building. For more information: <https://community-wealth.org/strategies/panel/clts/index.html>

Concept Plan The concept plans provide a visual representation of the vision and development policy for specified areas. The plans help determine how an area could be or is proposed to be developed. A concept plan is a useful tool in laying out a project is sufficient detail for municipal staff or investors to review and comment prior to submittal of a complete application.

Conditions of Approval means condition(s) imposed by the Municipality in the approval of a land development application, including any conditions contained in the annexure(s) and/or plans and/or attachment(s) that form part of the approval and/or are referred to in the approval of the land development application.

CUP Conditional Use Permit means a permit issued by the municipality stating that the proposed land uses and development activities meet all criteria and all conditions of approval in accordance with the procedural requirements of the code. The intent of requiring a CUP is to accommodate site-specific allowances while ensuring program requirements are satisfied.

Disposition and development agreement means an agreement between the Government Agency and a private developer which sets forth the terms and conditions under which will govern the disposition of land to a private developer.

Dry utilities construction in land development is the installation of electric, telephone, TV, internet, and gas in a community.

Due Diligence is an opportunity for the buyer-investor, to both independently research or receive full disclosure of the facts and conditions of a potential asset prior to completing a transaction with the seller.

Dwelling unit means a structure or the part of a structure that is used as a home or residence with provisions for living, eating, sleeping, cooking and sanitation. Generally referred to in state law for permanent habitation, not recreational or seasonal or transitory use facilities (hotel, motel, RV).

Easement An easement is a non-possessory right to use and/or enter onto the real property of another without possessing it. It is “best typified in the right of way which one landowner, A, may enjoy over the land of another, B.

Entitlements Land entitlement is the legal process of obtaining approvals for your development plans. This process can be lengthy, complicated, and at times, expensive. But it's a vital part of the development phase because it helps determine what can and can't be done with the property. Entitlements are a legal agreement between you and the governing municipality to allow for the development of a certain building type. Entitlements will detail the function, density and the setback requirements for your property.

ESA environmental site assessment defined as: the presence or likely presence of any hazardous substances or petroleum products on the property under conditions that indicate an existing release, a past release, or a material threat of a release of any hazardous substances or petroleum products into structures on the property or into the ground, groundwater, or surface water of the property.

Flatwork is the poured hardscape for all your patios, walkways, driveways, sidewalks, etc. Flood zones are geographic areas that the FEMA has defined according to varying levels of flood risk. These zones are depicted on a community's Flood Insurance Rate Map (FIRM) or Flood Hazard Boundary Map. Each zone reflects the severity or type of flooding in the area. Moderate to Low-Risk Areas.

Gantt Chart Gantt chart is a type of bar chart that illustrates a project schedule, named after its popularizer, Henry Gantt, who designed such a chart around the years 1910–1915. Modern Gantt charts also show the dependency relationships between activities and the current schedule status.

GEC (Grading and Erosion Control) Plan A set of plans prepared indicating the specific measures and sequencing to be used to control sediment and erosion on a development site during and after construction. GIS- geographic information system (GIS) is a system that creates, manages, analyzes, and maps all types of data. GIS connects data to a map, integrating location data with all types of descriptive information. This provides a foundation for mapping and analysis.

HOA Homeowners Association, is a self-governing organization in "common-interest" communities where homeowners collectively pay fees to maintain the units or neighborhood. HOAs are typically run by resident homeowners, unpaid volunteers who are elected to a board of directors that oversees the HOA's management. Properties within an HOA are governed by a collective set of rules and bylaws that are enforced by the association. Each property owner is required to pay HOA fees that cover use and maintenance of common areas. These areas can include swimming pools, parks, parking lots and roads, as well as communal lawn maintenance and landscaping. HOA's also generally required to have a capital account for the major repair or replacement of items under its control.

HUD Federal Department of Housing and Urban Development.

Hydrant Pressure Test Hydrant pressure tests ensure this reliability by determining the pressure and rate of flow at any point in a city's water distribution system.

Hydrology is the study of the amount and quality of water being stored or conveyed on the land surface, and in soils and rocks near the surface.

Incremental Development Development of a community, site, or a building with small increments, allowing for adaptation and innovation over time. Incremental development may have a pinnacle point or allow for adaptation to market demands.

Infill The term "infill development" refers to building within unused and underutilized lands within existing development patterns, typically but not exclusively in urban areas.

IRC International Residential Code update triennially by the International Code Council. These are the building codes generally used by municipalities for stick build homes or modular homes. Most recent version is the 2021 IRC code.

IRC Appendix Q or AQ The International Residential Code 2018 has an approved Appendix Q for Tiny Homes (<400SF). The most recent IRC is 2021 and includes an Appendix AQ for Tiny Homes.

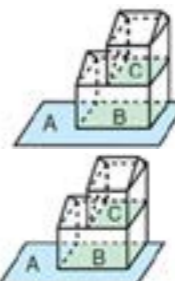
Land Disturbance Activity means any land change which may result in increased soil erosion from water and wind and the movement of sediments into community waters or onto lands and roadways within the community, including but not limited to clearing, dredging, grading, excavating, transporting, and filling of land, except that the term shall not include agricultural activities, exempted under the Clean Water Act.

LOI A Letter of Intent is a document that outlines the general terms and conditions of an agreement between parties before the agreement is finalized. In real estate deals, a Letter of Intent are typical before entering large leases or an agreement to buy or sell real estate for development.

Lot Coverage is usually presented in zoning codes as either Building Coverage Ratio (BCR) or Floor Area Ratio (FAR). See formulas below:

● **Building Coverage Ratio (BCR)**
$$\text{BCR (\%)} = \frac{\text{building area (B)}}{\text{site area (A)}} \times 100$$

● **Floor-Area Ratio (FAR)**
$$\text{FAR (\%)} = \frac{\text{total floor area (B+C)}}{\text{site area (A)}} \times 100$$



Management and Systems Engineering is a deliverable-oriented breakdown of a project into smaller components. A work breakdown structure is a key project deliverable that organizes the team's work into manageable sections.

Manufacture Home means a structure that was constructed on or after June 15, 1976, is transportable in one or more sections, is eight body feet or more in width, or 40 body feet or more in length, in the traveling mode, or, when erected on site, is 320 or more square feet, is built on a permanent chassis and designed to be used as a single-family dwelling with or without a foundation when connected to the required utilities, and includes the plumbing, heating, air conditioning, and electrical systems contained therein. "Manufactured home" includes any structure that meets all the requirements of this paragraph except the size requirements and with respect to

which the manufacturer voluntarily files a certification and complies with the standards established under the National Manufactured Housing Construction and Safety Act of 1974.

Mitigation Environmental mitigation is the process of addressing impacts to the environment caused by human action e.g. those resulting of highway, energy, water, and your proposed building projects — and follows a hierarchy. First, negative environmental impacts should be avoided, for instance by re-siting the project to a more suitable location. If relocation is not feasible, science-strong measures should be deployed to minimize harms. Finally, if environmental impacts are inevitable, there should be appropriate compensation or replaced elsewhere.

Modular home aka factory-built home - Modular homes are constructed to the same state, local or regional building codes as site-built homes but are built using a system in a factory. Modular homes are factory-built homes that meet or exceed local building codes.

Movable tiny homes aka Tiny Homes on Wheels Are units which are under 400 SF in size and constructed on a chassis and can be built to IRC, ANSI 119.5, NFPA 1192 or HUD (320 SF or more) building standards. NEPA The National Environmental Policy Act (NEPA) was signed into law on January 1, 1970. NEPA requires federal agencies to assess the environmental effects of their proposed actions prior to making decisions. <https://www.epa.gov/nepa/what-national-environmental-policy-act>
NFPA 1192 Building standards for recreational vehicles. <https://www.nfpa.org/codes-and-standards/all-codes-and-standards/list-of-codes-and-standards/detail?code=1192>

Opportunities and Constraints Analysis As part of one's due diligence on a property being considered for development, a site analysis will review items on and off the property that could affect its development. For example, a stream is a constraint in terms of building setbacks for potential flooding. But, with quality planning, this constraint can be turned into an asset or opportunity because it can be used for open space, hiking, picnicking etc. to add value to the project. All such constraints need to be noted and mapped so they can intelligently be worked into the overall plan.

Option agreement An option to purchase is an agreement that gives a potential buyer ("optionee") the right, but not the obligation, to buy property in the future. The optionee must decide by a certain time whether to "exercise" the option and thereafter be bound under the contract to purchase.

Overhead Utilities Those utilities that are most commonly distributed over a system that is suspended above ground through the use of poles. Overhead utilities typically include electrical power, telecommunications and cable.

Perk Test is a soil test that measures water absorption. "The tests are required in order to properly design an adequate septic system for the building being planned.

Plat is map, drawn to scale, showing the divisions of a piece of land – legal boundaries between properties. A topographic survey shows in addition to boundaries, the topography and unique features and manmade items e.g., buildings, roads, easements.

PUD – Planned Unit Developments are housing developments that are not subject to the standard zoning requirements, but instead work with the local government to develop criteria that will determine common areas, private areas and building guidelines. Each community has its own rules and regulations regarding PUD's but generally permit mixed use housing and, at times, supporting commercial development. Usually, PUD have common amenities that are overseen and paid for through a HOA – Home Owners Association, e.g., pool, recreation, open space, etc.

Purchase agreement A real estate purchase agreement is a legally binding agreement that governs the purchase and sale of a property. Made between a buyer and seller, it defines the terms of the transaction, and the conditions under which a sale will occur.

ROW (Right-of-Way) is a type of easement granted or reserved over the land for transportation purposes, this can be for a highway, public footpath, rail transport, canal, as well as electrical transmission lines, oil and gas pipelines. A right-of-way can be used to build a bike trail.

ROI Return on Investment ROI tries to directly measure the amount of return on a particular investment, relative to the investment's cost. ROI is expressed as a percentage and is calculated by dividing an investment's net profit (or loss) by its initial cost or outlay.

RV Recreational Vehicle can be a motor home, travel trailer, truck camper, or camping trailer, with or without motive power, designed for human habitation for seasonal, recreational, or emergency purposes. Schematic Plan translates the project program into physical drawings of space, e.g. the relationship of buildings and other project elements onto the land it is to be placed.

Setbacks a setback or setback requirement for a property refers to the distance that the house or structure must be from the front, sides, and back of the property line.

Site Development Plan A plan depicts the general layout and configuration of a site, including building footprints, parking and street layout, conceptual landscaping and lighting, site cross section drawings, and building elevations.

Slab on Grade a slab is a single layer of concrete, several inches thick. The slab is poured thicker at the edges, to form an integral footing; reinforcing rods strengthen the thickened edge. The slab normally rests on a bed of crushed gravel to improve drainage. Casting a wire mesh in the concrete reduces the chance of cracking. A slab on grade is suitable in areas where the ground doesn't freeze.

SMSA - Standard metropolitan statistical area Much of the USA is divided into over 900 SMSA. They are a great source of data for a region and are used extensively for federal and state program funds and rules and regulations. For example, definition of low- and moderate-income housing is based of the "medium household income" for the SMSA. Low income is 50% and moderate income is 80% of medium family income. Rent is then determined based on 30% of that income. For example, if the Medium Family Income for the SMSA is \$100,000, low income would be 50% or \$50,000. 30% of \$50,000 is \$15,000 that one can spend annually for rent.

Staging - Home staging is the activity or practice of styling and furnishing a property for sale in such a way as to enhance its attractiveness to potential buyers.

State EPA Many states have their own EPAs that oversees the protection of the environment. Many may have rules and regulations your project may have to meet or procedures to follow for your project to be approved.

Underground Utilities Those utilities that are most commonly distributed over a system that is buried in the ground. Virtually any utility can be placed underground, examples include water, sewer, storm water, natural gas, electrical, communications and cable.

Utility vault A utility vault is an underground structure providing access to subterranean public utility equipment, such as valves for water or natural gas pipes, or switchgear for electrical or telecommunications equipment.

Variance is a waiver for a zoning regulation, granted on a case-by-case basis for specific requests. Once a zoning variance is granted, it runs with the land. It means that, if a requested real estate variance is granted, it will stay in place, even if the property changes hands. Also, Variance is a request for relief from strict application of zoning regulations to alleviate an unusual hardship to a particular property.

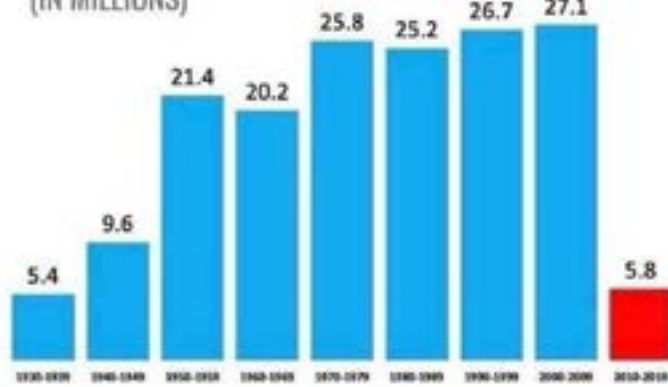
Wet Utilities Water, sewer and storm water utilities serving one's project.

Will Serve Letter is typically written by a utility company to the applicant for service. Within the letter, the utility company generally detail its understanding of the scope of work, and whether or not ample service can be provided to meet the demands of the proposed construction. For example, if you require water service from the local water provider, you want to obtain a "will serve" letter that they can and will provide service to your property if it is approved for development.

Zero Lot Line means the buildings are built onto at least one of the property boundaries.

HOMES BUILT IN THE UNITED STATES BY DECADE

(IN MILLIONS)



THANK YOU!

Melanie Atkinson, AMP Expos
Don Fitzpatrick, THIA

May 2022