CASE STUDIES:

The Development of Urban Housing

COURSE OVERVIEW AND OBJECTIVE:
If you are considering becoming a developer of housing after you graduate, this course will provide you with an introductory overview of the issues and challenges developers face in providing small-scale housing in an urban setting. Designed primarily for upper-division undergraduates, this seminar will explore the various elements and stages of the housing development process for projects in Southern California. Students will learn about and prepare each component, including land, entitlements, program, design brief, support spaces, site plan, hard and soft costs and a cost analysis/proforma suitable for presentation to banks, investors and lending institutions. The course will include guest lecturers who are practicing professionals in the Los Angeles housing development arena and who will present a series of local case studies. There will be ample opportunities for open discussion. Each lecture will consist of three parts: A) A short review of the previous lecture B) The lecture or seminar C) discussion with questions and answers. Four short quizzes will be given on class presentation material. The class will start with a one act play, ‘The Development Project,’ where each student(s) will be assigned a specific member of the development team. A reading list is attached and additional handouts will be provided.

Guest lecturers include non-profit and for-profit developers, architects, construction managers, entitlement consultants, cost & estimating specialists, lenders and investors, contractors, and property managers. Lectures will also include architectural design, quality, sustainable design, and the related cost issues.

mutlow@usc.edu

Instructor:
Prof. John V. Mutlow, FAIA
Housing types covered in the development seminar will include single family, multi-family, historic renovation, and mixed use developments. The class will culminate in the students preparing a finished professionally assembled written proposal with which to seek capital from private investors and financial institutions for a small scale housing development project.
GRADING:
Class Participation (Class Notes) 10%
Class Quizzes (5% each x 4 quizzes) 20%
Mid-term Paper (Development Outline & Proforma) 25%
Final Paper (Lending Institution Submittal Proposal) 45%
Total 100%

PROTOCOLS AND CLASS ATTENDANCE
Attending all class meetings is imperative. No absences will be excused without proper documentation. Late arrivals, disappearances or early departures will be considered absences. (Two unexcused absences will affect your grade.) Three or more unexcused absences can lead to failure of the course, even if the course work is completed and deadlines are met.

All work must be done on time to receive full graded credit. Work not completed at the time of due date will receive a drop in one full letter grade.

Unsatisfactory performance reports will be issued to students whose work is not satisfactory. Remember that an incomplete grade (IN) is limited by University policy to cases of extended documented illness or family emergency involving a passing – level student in the last weeks of the semester.
University guidelines relative to plagiarism pertain to original student work. You are expected to do all of your own class assignments. Assistance received or the flagrant appropriation of the work of others will be considered as non-original work and will be treated as plagiarism.

Please review accompanying University Policy on Student Disability Act.

BIBLIOGRAPHY
Required Reading
Authors: Mike E. Miles, Lawrence Netherton, Adrienne Schmitz,
Urban Land Institute, 2015

Reference Reading
Residential Development Handbook
Authors: Adrienne Schmitz et al
Urban Land Institute, 2004

Developing Successful Infill Housing
Author: Diane R. Suchman,
Urban Land Institute, 2002

The HOK Guidebook to Sustainable Design
Author Sandra F. Mendler, William Odell,
John Wiley & Sons, Publisher, 2000
+ Goals p. 6-12, Economics p.13-16, Process p.17-31
+ Case Studies: Edificio Malecon p. 186-193, Green Bay New Academic +
Building p.290-300
Green By Design
Author Angela M. Dean
Gibbs Smith, Publisher, 2003

Housing For Niche Markets
Capitalizing on Changing Demographics
Editor: Jo Allen Gause, Editor
Urban Land Institute, 2005

Workforce Housing
Innovative Strategies and Best Practices
Urban Land Institute, 2006

Affordable Housing
Designing an American Asset
Authors: Adrienne Schmitz et al
Urban Land Institute, 2005

ARTICLES

How to Turn a Parking Lot into Apartments, a Library, and a Grocery Store, the Hard Way
arcCA Issue 04.2, p.33-39, Author David Prowler

Workers’ Growing Need for Housing – Multifamily Trends, summer 2004
p.40-43, 66

The Changing Face of Affordable Housing – Multifamily Trends, summer 2004
p.44-49, 68-69

Architecture in the Public Interest – Architecture, April 2004 p.27-31

How to Design for Humans – Architecture, April 2004 p.39-40

Case Study Handouts of Housing Development Projects by Guest Lecturers/Developers

CLASS SCHEDULE:

Week 1A, 01/08:
An Overview and Introduction of the Course
The Role of the Architect, Developer and Players in the Development Process
Prof. John V. Mutlow, FAIA, USC
Principal, John V. Mutlow Architects, Los Angeles
Class Overview
Role play for the development team members in the housing development process with an overview of the responsibilities of the developer and the role of the architect.
Handouts:
Architecture in the Public Interest – Architecture, April 2004 p. 27-31
Development Process and the Development Team, p. 10-18
(Residential Development Handbook)
CLASS SCHEDULE

Week 1B, 01/08:
The Developer, Programming & Approval Process
   Overview of the Role of the Developer
   Overview and Key Points of Programming for Housing Development
   What Activities/Support Spaces Should be Included and Why?
Handouts:
   Key points of Developer Presentation
   Sample Program for a Housing Project
   Workers’ Growing Need for Housing - Multifamily Trends, summer 2004 p.40-43, 66

The Need for Housing, Site Identification, & Initial Site Feasibility
Prof. John V. Mutlow, FAIA
   How Do You Find a Site?
   Description of Site and Site Issues for a Housing Development
Handouts:
   Key points of site Analysis, Feasibility,

Week 2, 01/15:
University Holiday, MLK Day

Week 3A, 01/22:
Entitlements
Guest Lecturer David Moss, Moss Associates, Entitlement consultant
   What are the Entitlement Concerns for a typical residential site?
   PowerPoint Presentation about Recent Housing Development Activities
Handouts:
   Key points of Entitlement Presentation
   Standard Forms and Petitions for Entitlements
   Packet of Entitlement Issues

Week 3B, 01/22:
Financing: Lending through the Perspective of a Lender
Guest Lecturer Loan Officer - Chase Bank, US Bank, Citibank.
   Overview of Financing for Housing Development
   What Does a Lending Institution Look For?
   What are the Components of the Finance Package?
   PowerPoint Presentation about Finance, Packages
Handouts:
   Key points of Financing Presentation
   Copy of Finance Documents of an existing property

Week 4A, 01/29:
Costs, Estimating, & Construction
Guest Lecturer Cost Estimator, Contractor
   Review of Cost Estimating Construction Documents
   Construction Issues for Small Scale Multifamily Housing
   Description of Construction Issues, Timelines, Subcontractors
Handouts:
   Construction Cost Estimating Standard Sample Form
   Standard Formula for Cost Estimating
   List of Construction Issues
CLASS SCHEDULE

Week 3B, 01/22:
**Financing: Lending through the Perspective of a Lender**
*Guest Lecturer Loan Officer - Chase Bank, US Bank, Citibank.*
- Overview of Financing for Housing Development
- What Does a Lending Institution Look For?
- What are the Components of the Finance Package?
- PowerPoint Presentation about Finance, Packages

**Handouts:**
- Key points of Financing Presentation
- Copy of Finance Documents for a property

Week 4A, 01/29:
**Costs, Estimating, & Construction**
*Guest Lecturer Cost Estimator, General Contractor*
- Review of Cost Estimating Construction Documents
- Construction Issues for Small Scale Multifamily Housing Project
- Description of Construction Issues, Timelines, Subcontractors

**Handouts:**
- Construction Cost Estimating Standard Sample Form
- Standard Formula for Cost Estimating
- List of Construction Issues

Week 4B, 01/29:
**Development Portfolio and Proformas**
*Guest Lecturer, Liz Falletta, MRED USC*
- What are the Elements of a Proforma
  - The Development of a Proforma

**Handouts:**
- Proforma Spreadsheet
- Investors Package

Week 5A, 02/05:
**Architectural Issues: Good Design Matters.**
**Design Quality, Sustainable Architecture**
*Prof. John V. Mutlow, FAIA*
- Does Good Design Matter?
- Does good design Cost?
- Review good design elements.
- Concerns and Benefits of Sustainable Design
- Review of Sustainability/Greenpoint Checklists

**Handouts:**
- Key points of Materials Presentation
- Sustainability/Greenpoint Checklist
- The HOK Guidebook to Sustainable Design / Sandra F. Mendler, William Odell
  Goals p.6-12, Economics p.13-16, Process p.17-31;
- Green by Design / Angela M. Dean, Design Process p. 38-47,
  Case Study p.52-57

Week 5B, 02/05:
**Midterm paper requirements and review**
*Professor John V. Mutlow, FAIA*
- Detail Outline and Review of Contents for Midterm Paper
CLASS SCHEDULE

Saturday, 02/10: 10am-1pm
Site Visit
Modative: Small Lot Sub-Division

Week 6A, 02/12:
Case Study, Multifamily Infill Housing Development.
Guest Lecturer Christian Navar & Alan Dana, AIA,
Modative, Architects, Los Angeles
(USC Architecture Alumni)
- New models for market rate housing on the horizon
- Does Design Matter in Marketing/Sales
- Presentation of Development Portfolio, Small Lot Sub-Division, and
- Multi-Family Housing
Handouts
- Key Elements of Small Lot & Multi Family Infill Housing Development

Week 6B, 02/12:
Typological Study - Small Lot Sub-Division
Ric Abramson, FAIA - Architect, Workplays Studio
Complete Typological Study Presentation
Handouts:
- Case Study: Small Lot Sub-Division
Reading:
- Residential Development Handbook

Saturday 02/17: 10am-1pm
Site visit – Ric Ambramson – Small Lot Sub-Division

Week 7, 02/19:
University Holiday, President’s Day

Week 8A, 02/26:
Case Study, Custom Single Family Housing Development.
Guest Lecturer Professor Kim Coleman, USC
Principal, Cigolle X Coleman Architects
- Challenges and rewards of custom Single-family House Development
- PowerPoint presentation of portfolio samples
Handouts:
- Key Elements of Custom Single-family House Development

Week 8B, 02/26:
Course Review
Final Paper Requirements Review
Prof. John V. Mutlow, FAIA
- Review of course critical elements that need to be included in a request to a financial Institution for financing.

Week 9A, 03/05:
Course and Final Paper Due: Watt 204, 2pm
A Professional Application Package/Request to a Lending Institution for Financing. (Including Proforma)
Academic Conduct

Plagiarism – presenting someone else’s ideas as your own, either verbatim or recast in your own words – is a serious academic offense with serious consequences. Please familiarize yourself with the discussion of plagiarism in SCampus in Section 11, Behavior Violating University Standards https://scampus.usc.edu/1100-behavior-violating-university-standards-and-appropriate-sanctions/. Other forms of academic dishonesty are equally unacceptable. See additional information in SCampus and university policies on scientific misconduct, http://policy.usc.edu/scientific-misconduct/.

Discrimination, sexual assault, and harassment are not tolerated by the university. You are encouraged to report any incidents to the Office of Equity and Diversity http://equity.usc.edu/ or to the Department of Public Safety http://capsnet.usc.edu/department/department-public-safety/online-forms/contact-us. This is important for the safety whole USC community. Another member of the university community – such as a friend, classmate, advisor, or faculty member – can help initiate the report, or can initiate the report on behalf of another person. The Center for Women and Men http://www.usc.edu/student-affairs/cwm/ provides 24/7 confidential support, and the sexual assault resource center webpage sarc@usc.edu describes reporting options and other resources.

Support Systems

A number of USC’s schools provide support for students who need help with scholarly writing. Check with your advisor or program staff to find out more. Students whose primary language is not English should check with the American Language Institute http://dornsife.usc.edu/ali, which sponsors courses and workshops specifically for international graduate students. The Office of Disability Services and Programs http://sail.usc.edu/academicsupport/centerprograms/dsp/home_index.html provides certification for students with disabilities and helps arrange the relevant accommodations. If an officially declared emergency makes travel to campus infeasible, USC Emergency Information http://emergency.usc.edu will provide safety and other updates, including ways in which instruction will be continued by means of blackboard, teleconferencing, and other technology.