

1. Support for the Federal Fiscal Year 2025 Moving to Work Annual Plan. – TO BE HEARD IMMEDIATELY AFTER CONSENT

Recommendation:

The Board of Commissioners of the City of San José Housing Authority adopts a resolution authorizing the:

(a) City of San José Housing Authority Board's Executive Director to submit a letter to the Santa Clara County Housing Authority Board to support the federal Fiscal Year 2025

Moving to Work Annual Plan; and

(b) Executive Director of the Santa Clara County Housing Authority Board and the Chair of the Santa Clara County Housing Authority Board of Commissioners to execute documents required in connection with the federal Fiscal Year 2025 Moving to Work Annual Plan submittal in the name of the City of San José Housing Authority.

CEQA: Not a Project, File No. PP17-0094, Staff Reports, Assessments, Annual Reports, and Informational Memos that involve no approvals of any City action. (Housing)

TO BE HEARD IMMEDIATELY AFTER CONSENT



Memorandum

TO: SAN JOSE HOUSING AUTHORITY
BOARD OF COMMISSIONERS

FROM: Rosalynn Hughey

SUBJECT: SEE BELOW

DATE: March 4, 2024

Approved

Date

3/5/24

**SUBJECT: SUPPORT FOR THE FEDERAL FISCAL YEAR 2025 MOVING TO
WORK ANNUAL PLAN**

RECOMMENDATION

It is recommended that the Board of Commissioners of the City of San José Housing Authority:

Adopt a resolution authorizing the:

- (a) City of San José Housing Authority Board's Executive Director to submit a letter to the Santa Clara County Housing Authority Board to support the federal Fiscal Year 2025 Moving to Work Annual Plan; and
- (b) Executive Director of the Santa Clara County Housing Authority Board and the Chair of the Santa Clara County Housing Authority Board of Commissioners to execute documents required in connection with the federal Fiscal Year 2025 Moving to Work Annual Plan submittal in the name of the City of San José Housing Authority.

SUMMARY AND OUTCOME

Staff from the Santa Clara County Housing Authority (SCCHA) will submit its federal Fiscal Year 2025 Moving to Work Annual Plan (MTW Plan) (see *Attachment – FY2025 Moving to Work Annual Plan*) for consideration to the U.S. Department of Housing and Urban Development (HUD) after approval by SCCHA's Board of Supervisors. Approval from the City of San José Housing Authority (City Housing Authority) is necessary for the SCCHA Board of Supervisors' approval. Housing authorities with HUD's Moving to Work (MTW) designation update and submit plans each year to HUD. MTW is a federal demonstration program that encourages selected housing authorities to propose and, upon HUD approval, implement innovative changes to the way affordable housing programs are administered.

This year, SCCHA's MTW Plan seeks flexibility on the implementation of small area fair market rents to set payment standards for Housing Choice Vouchers, portable rental vouchers typically referred to as the "Section 8" voucher program. City of San José (City) Housing Authority Board of Commissioners' approval of the proposed activity would support SCCHA to minimize rent payment decreases to property owners in areas with lower small area fair market rents. This flexibility would lower the likelihood that property owners in low-rent areas would want to leave the program due to rent payment decreases and minimize the involuntary displacement of renters in low-rent areas.

The 1996 agreement establishing the operational terms between the City Housing Authority and SCCHA (1996 Agreement) requires that SCCHA consult with the City Housing Authority and obtain approval of any significant policy decisions regarding administration of the City Housing Authority programs. MTW plans are considered major policy documents under the 1996 Agreement. This request for approval for the MTW Plan and adoption of the accompanying resolution will also authorize SCCHA to sign and submit the MTW Plan on behalf of the City Housing Authority.

BACKGROUND

Under the 1996 Agreement, the City Housing Authority delegated to SCCHA the entire management of the Section 8 voucher program, and any subsequent HUD contracts, allocations, and programs in the City.

Among other activities, SCCHA administers and manages public housing and approximately 17,000 Housing Choice Vouchers on behalf of HUD to provide rental assistance programs for lower-income families, seniors, and persons with disabilities. SCCHA also administers and manages the public housing and rental voucher programs for the City Housing Authority pursuant to the 1996 Agreement. Sixty percent of the vouchers managed by SCCHA are allocated by HUD to SCCHA under its own name; forty percent of the vouchers managed by SCCHA are allocated by HUD to the City Housing Authority's name.

Moving to Work Designation

Established by Congress in 1996, MTW is a federal demonstration program that links broad federal goals with locally designed affordable housing initiatives. The MTW program encourages selected housing authorities to propose and, upon HUD approval, implement innovative changes to the way in which affordable housing programs are administered in order to meet at least one of the following three federal goals:

- Decrease costs and increase cost effectiveness in housing program operations;
- Promote participants' economic self-sufficiency; and
- Expand participants' housing choices.

MTW annual plans are major policy documents that include numerous policies and guidelines impacting the use, administration, management, and oversight of SCCHA's and the City Housing Authority's rental voucher programs. Each year, SCCHA releases an updated MTW plan with new policies that, once approved by HUD, give them additional flexibility that may be implemented as part of its MTW program. After HUD approves the proposed policies, SCCHA can implement those policies through programs that meet the housing needs of the local community. In 2008, SCCHA entered into an agreement with the City's Housing Department and HUD to become an MTW agency; that agreement expires in 2028.

ANALYSIS

SCCHA recently revamped its MTW program (for the County Housing Authority and the assigned City Housing Authority operations) to better focus on priorities that would more effectively serve the local community and SCCHA's voucher holders, community partners, and affordable housing residents.

This year, the MTW Plan requests HUD's approval of the following activity, as excerpted from the draft MTW Plan:

“Proposed Activity 2025-01 Small Area Fair Market Rents: SCCHA currently sets Housing Choice Voucher payment standards based on the Fair Market Rents that HUD publishes annually for each metropolitan area. Beginning in 2025, SCCHA will be required to use Small Area Fair Market Rents instead, which are based on zip codes instead of metropolitan area. Small Area Fair Market Rents enable higher payment standards in more expensive zip codes, which increases the number of units that are affordable in higher opportunity areas, but it would also reduce payment standards in lower-cost zip codes, where many voucher households currently live. SCCHA seeks the flexibility to set payment standards above the HUD allowable range in target zip codes in order to mitigate the negative impacts on current and future voucher households and prevent involuntary displacement of renters in low-rent areas.”

Need for Signature Authorization

SCCHA's Board of Commissioners chair and the SCCHA executive director continue to sign the authorizations for the City Housing Authority's MTW plans using the titles of “Chair Board of Commissioners of the City Housing Authority” and “Executive Director of the City Housing Authority.”

This memorandum's accompanying resolution is intended to authorize the SCCHA Board of Commissioners chair and the SCCHA executive director to act in the name of the City Housing Authority with respect to the MTW annual plan submittals to ensure that the submittals are fully authorized despite the use of the duplicative titles discussed below.

The City Housing Authority retains its Board of Commissioners and may implement other affordable housing programs not assigned to SCCHA under the 1996 Agreement. Accordingly, the City Housing Authority has a chair and an executive director separate from the SCCHA Board of Commissioners. The 1996 Agreement does not designate the chair of the SCCHA Board of Commissioners as the “Chair of the Board of Commissioners of the City Housing Authority” or confer on SCCHA’s executive director the title of the “Executive Director of the City Housing Authority.” In the documentation attached to the draft MTW Plan, the chair of SCCHA’s Board of Commissioners is executing documents under the title of the Chair of the Board of Commissioners for the City Housing Authority. There is no authorization for the use of these duplicative titles in the 1996 Agreement between the City Housing Authority and SCCHA. Similarly, the executive director for SCCHA is not authorized to sign under the title of the executive director of the City Housing Authority.

Resolution No. 66499.1, approved on March 26, 1996, designated the Housing Director to act as “Executive Director of the City Housing Authority.” The Acting Housing Director for the City is serving as executive director of the City Housing Authority until such time as a permanent Housing Director is appointed.

This approval will allow SCCHA to sign this MTW Plan on behalf of the City Housing Authority and submit the report in a timely manner to HUD. If HUD approves this MTW Plan, SCCHA will be able to keep households using Housing Choice Vouchers stabilized in their existing rental homes in low-rent areas of San José.

EVALUATION AND FOLLOW-UP

Housing Department staff will continue to work with SCCHA to ensure that City Housing Authority’s priorities are considered throughout the implementation of the MTW Plan. Additionally, Housing Department staff will continue to work with SCCHA staff on developing impactful activities to improve the health, income, and educational status of San José residents in future MTW plans. As appropriate, Housing Department staff will return to the City Housing Authority’s Board of Commissioners if further action is needed to provide formal City Housing Authority comments and direction.

COORDINATION

This memorandum has been coordinated with the City Attorney’s Office and the City Manager’s Budget Office.

PUBLIC OUTREACH

This memorandum will be posted on the San José Housing Authority Board of Commissioners agenda website for its March 26, 2024, meeting.

The following outreach was undertaken for this item in addition to the agenda posting described above:

- On February 20, 2024, SCCHA published the draft MTW Plan on its website for a 30-day public review period through March 20, 2024.
- On March 8, 2024, SCCHA held a public hearing on the draft MTW Plan.

The proposed draft MTW Plan (*Attachment – FY2025 Moving to Work Annual Plan*) will also be presented to SCCHA’s Board of Commissioners at its public meeting on March 8, 2024.

COMMISSION RECOMMENDATION AND INPUT

No commission recommendation or input is associated with this action.

CEQA

Not a Project, File No. PP17-004, Government Funding Mechanism or Fiscal Activity with no commitment to a specific project which may result in a potentially significant physical impact on the environment.

PUBLIC SUBSIDY REPORTING

The item does not include a public subsidy as defined in government code section 53083 or 5308.1 or in the City’s Open Government Resolution.

/s/

ROSALYNN HUGHEY

Executive Director, San José Housing Authority

For questions, please contact Kristen Clements, Division Manager, at Kristen.Clements@sanjoseca.gov.

Attachment – FY2025 Moving to Work Annual Plan

Attachment – FY2025 Moving to Work Annual Plan



FY2025 Moving to Work Annual Plan

Housing Authorities of the County of Santa Clara & City of San José

Submitted on April 15, 2024



FY2025 Moving to Work Annual Plan

SANTA CLARA COUNTY HOUSING AUTHORITY (SCCHA)

(Housing Authorities of the County of Santa Clara & The City of San José)

SCCHA's mission is to provide and inspire affordable housing solutions to enable low-income people in Santa Clara County to achieve financial stability and self-reliance.

Serving residents throughout Santa Clara County, the heart of Silicon Valley and part of the greater San Francisco Bay Area, our clients include families with children, seniors, veterans, the disabled and the formerly homeless. The vast majority of our client households are extremely low-income (30% of area median income or less) with half of our assisted households occupied by seniors. **SCCHA currently assists over 19,000 households.**

Board of Commissioners

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Nathan Ho, Senior Strategic Advisor

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I. Introduction

With a resident-centered approach, the Housing Authority is using authentic internal culture change to build stronger local and national partnerships, ensuring a new relevance in Santa Clara County and leading to a growth in Housing Authority developed and owned buildings. The innovative spirit of Silicon Valley is seeping into a new Housing Authority culture where collaborative efforts to address the affordable housing shortage in Santa Clara County are being executed. In FY2025, to ensure equity and justice, the Housing Authority plans to prioritize housing developments for low-income individuals and families, embracing the lived experience of our residents and community members.

According to the Silicon Valley Index Report, wealth inequality in Silicon Valley is more pronounced than in the U.S. overall or globally. The top 1% of households hold 48 times more total wealth than the bottom 50% of households. Approximately 23% of County residents live below the poverty threshold, with higher rates among people of color and marginalized communities. In the face of these statistics the Housing Authority has much work ahead.

Since January 2020, Santa Clara County's supportive housing system has connected more than 5,000 people with permanent housing. The County's \$950 Million Housing Bond has produced more than 4,400 permanent supportive housing units. The Housing Authority is an invaluable partner in this effort with Project-Based Vouchers supporting 2,170 units. The Housing Authority's annual investment is upward of \$74,000,000 and will continue to increase as more projects finish construction and rents increase in years to come. Our community's collective efforts are working. Fewer people are falling into homelessness, we have more temporary housing options and together we're leveraging new sources of local, state, and federal funding to overcome homelessness.

The Housing Authority is engaged in multiple efforts to expand the reach and breadth of programs offered to the community, including developing a Mobility Program and beginning to plan for a Direct Rental Assistance Fund, even as we await approval to use Moving to Work funds in this endeavor.

Moving forward, SCCHA's talented staff is fully engaged in working collaboratively with the community to create a more relevant, connected MTW program, truly driven by local input and efforts.



Bracher Gardens Apartments

In 1967, the Santa Clara County Board of Supervisors established the Santa Clara County Housing Authority (SCCHA). SCCHA has an agreement with the City of San José to administer and manage the Housing Authority of the City of San José (HACSJ)'s Housing Choice Voucher program. This MTW Plan presents a consolidated strategy to be implemented for both the County and City programs.

SCCHA is continuing to improve the Moving to Work Plan process intentionally focusing on collaboration and inclusivity in planning and a purpose-driven approach to activity development.

Vision and Goals

The Housing Authority is undergoing a refresh of the Strategic Plan to ensure the Plan is relevant to the future of the Agency and our role in the local community. The goals have not changed but have been streamlined into more accessible statements of intent that are centered around residents. SCCHA's future actions will be carefully examined through the lens of diversity, equity, and inclusion. These principles will be at the forefront of the agency's thought processes, and will guide the formulation of procedures, policies, and both internal and external engagement.

The Strategic Plan focuses on housing availability, agency partnerships, and operational excellence. Below are the goals of the Strategic Plan accompanied by SCCHA's actions to achieve the goals.

Internal Culture Change

Goal Ensure Santa Clara County Housing Authority is a partner of choice in Santa Clara County.

The Housing Authority is entering an era of increased relevance in the community, both as the administrator of the Section 8 Program and as a highly visible developer of affordable housing. All of this requires dedicated staff, with a vested interest in the work of building vibrant communities through innovation. Team-building events and more transparency are pushing the Agency forward into a more cohesive group, silos falling away in favor of collaboration.

Strengthen Partnerships

Goal Collaborate with diverse partners to holistically support the needs of low-income communities.

We are stronger together as evidenced by the outcome of pairing Project Based Vouchers with the County's \$950 million in Measure A bond funds. By the end of FY2025 the Housing Authority expects to have contributed to Measure A over 2,700 new Project-Based Vouchers for the most vulnerable groups in the County. Measure A as a whole has brought almost 6,500 newly constructed affordable units to Santa Clara County since 2016.

The Housing Authority has active partnerships with local municipalities, non-profit and for-profit developers, and community non-profits. In FY2025 the Housing Authority anticipates strengthening some of these partnerships by joining some of the smaller non-profit developers in the County to aid them in development of affordable housing.

Relevance & Innovation

Goal Develop new ways of thinking and implementing solutions to serve our residents and community.

As the Housing Authority, the County, and the broader community adopt a new normal SCCCHA intends to keep moving the needle on the technology that makes our jobs easier. A planned software conversion in FY2025 will streamline staff processes and make it easier for residents to get quick answers to their questions.

Portfolio Growth

Goal Increasing the value and unit count of our portfolio to ensure sustainable resident success.

Approximately 3,500 multi-family units throughout the County are owned and managed by the Housing Authority, with that number only set to increase in the next several years. In an area where public dollars are competitive and less and less available, the Moving to Work funding is more important than ever and allows our Development Team to continue working on the robust pipeline.

Department Updates

Housing Programs

- Increase community presence by attending local public events
- Introduced the “Eligibility Blitz” to process applicant eligibility in a matter of hours
- Collaborate across teams to lease up Project-Based Voucher units coming down the pipeline

Human Resources

- Enhancing new hire orientation and on-boarding experience
- Developing staff recognition initiatives
- Implementing new recruitment technology

Procurement

- Implement automated management systems
- Train all Agency Departments on updated Procurement procedures
- Update Procurement contract and solicitation templates

Information Technology & Facilities

- Implement and launch Yardi agency wide
- Implement security enhancements to agency’s network
- Incorporating more energy efficient HVAC and lighting systems

Finance

- Assist other departments with HCV Yardi conversion and implementation
- Improve external and internal reporting
- Develop and implement construction module in Yardi

Innovation & Impact

- Draft annual MTW Plans and Reports
- Reviewing and updating PBV policies
- Working with community partners to expand collaborative efforts

Real Estate – Asset Management

- Develop written policies and procedures for Replacement Reserve accounts and withdrawals
- Complete implementation of MRI across portfolio
- Create dashboard with key performance metrics

Real Estate - Development

- Construction continues at Alvarado Park Senior Housing (89 units) and Bellarmino Place Family Housing (115 units).
- Construction will begin for at Hawthorne, a 107-unit property reserved for chronically homeless families.
- Capital repairs and rehabilitation for several newly acquired properties - Jardines Paloma Blanca, Girasol Housing, Las Golondrinas Apartments, and Rincon de los Esteros.

PBV Pipeline

SCCHA's PBV pipeline is detailed in Section II of this Plan. Several of the projects completing construction in FY2025 have come through the County's \$950 million Measure A bond, which provides funds for the development of affordable housing and permanent supportive housing. Attaching vouchers to the Measure A development funds ensures that units will be affordable for the County's vulnerable populations, and that new construction properties will have sufficient and long-lasting operating revenue. SCCHA is committed to making available as many additional PBVs in support of Measure A as HUD regulations and funding availability allow.

Projects awarded through the Housing Authority's 2020 RFP are also finishing construction and will be leasing up in FY2025. Two and 3-bedroom units were the focus of the 2020 RFP and the families for those units come from the Housing Authority's wait list. The projects in the PBV pipeline will increase the local affordable housing stock by over 2,300 units, at least 650 of those supported by PBVs, once all units are constructed. In FY2025 9 projects are expected to finish construction, bringing 331 PBVs online, most set aside for chronically homeless families being added to the affordable housing stock.

In FY2025 SCCHA plans to work with local developers in strategizing future PBV awards.

New Proposed Activities for FY2025

In FY2025 and beyond, SCCHA intends to align the MTW Plan more closely with the strategic goals of the agency. Serving residents and prioritizing the needs of the local community will be the guiding focus of the proposed initiatives.

SCCHA is proposing one new activity in this year's Plan. The activity is in response to the HUD-issued Federal Register Notice requiring SCCHA to implement Small Area Fair Market Rates. The goal of the activity is to protect families from displacement.

Full details of the proposed activities can be found in Section III of this MTW Plan.

Overview of SCCHA's MTW Activities

Note: Closed Out Activities 2009-3, 2009-4, 2009-6, 2009-7, 2009-10, 2009-12, 2010-1, 2012-1, 2014-1a, 2014-1b, 2014-2, 2015-1, 2016-1, 2018-1, and 2020-6 are not shown.

| MTW Statutory Objectives | | | | |
|--|--|---|---|--|
| ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #) | ACTIVITY | REDUCE COST & ACHIEVE GREATER COST EFFECTIVENES S IN FEDERAL EXPENDITURE S | PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY | INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES |
| 2009-1 (Amended in FY2016; and FY2021) | Reduced Frequency of Tenant Reexaminations | X | X | |
| 2009-2 | Expediting the Initial Eligibility Income Verification Process | X | | |
| 2009-5 | Exploring New Housing Opportunities for the Chronically Homeless | | | X |
| 2009-8 | 30-Day Referral Process for Project-based Vacancies | X | | |
| 2009-9 | Utilization of Low-Income Housing Tax Credit (LIHTC) Tenant Income Certification (TIC) for Income and Asset Verification | X | | |
| 2009-11 | Project-Base 100 Percent of Units in Family Projects | | | X |
| 2009-13 | Combined Waiting Lists for the County of Santa Clara and the City of San José | X | | |
| 2009-14 (amended in FY2014) | Payment Standard Changes Between Regular Reexaminations | X | | |
| 2010-2 | Excluding Asset Income from Income Calculations for Families with Assets Under \$50,000 | X | | |
| 2010-3 | Applying Current Increased Payment Standards at Interim Reexaminations | X | | |
| 2010-4 (amended in FY2023) | Allocating Project-Based Vouchers to SCCHA-Owned Projects Without Competition | X | | |
| 2010-5** | Assisting Over-Income Families Residing at SCCHA-Owned Project Based Voucher Properties | | | X |

| MTW Statutory Objectives | | | | |
|--|--|---|---|--|
| ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #) | ACTIVITY | REDUCE COST & ACHIEVE GREATER COST EFFECTIVENES S IN FEDERAL EXPENDITURE S | PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY | INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES |
| 2011-1 | Streamlined Approval Process for Exception Payment Standard for Reasonable Accommodation – HCV | | | X |
| 2011-2 | Simplify Requirements Regarding Third-Party Inspections and Rent Services | X | | |
| 2012-2 | Minimum Two-year Occupancy in Project-Based Unit | X | | |
| 2012-3 | Create Affordable Housing Acquisition and Development Fund | X | | X |
| 2012-4 | Create Affordable Housing Preservation Fund for SCCHA- and Affiliate-Owned Properties | X | | X |
| 2012-5** | Expand Tenant Services at SCCHA or Affiliate-Owned Affordable Housing Properties | | X | |
| 2013-1 | Elimination of the Earned Income Disallowance (EID) Calculation | X | | |
| 2014-3** | Freeze on Contract Rent Increases | X | | |
| 2014-4 (amended in FY2015 & FY2024) | Increased Tenant Contribution—Up to 35 Percent of Gross Income | X | | |
| 2015-2 | Project-Based Voucher Inspection Self-Certification | X | | |
| 2015-3 | Modify Elderly Definition for PBV | | | X |
| 2016-2 | Streamlining of PBV Selection Requirements | | X | |
| 2017-1 | Phasing in the Subsidy Standard Change | X | | |
| 2017-2 | Special Needs Population Direct Referral Program | | | X |
| 2017-3 (amended in FY2018, FY2019, & FY2024) | Landlord Initiatives | | | X |
| 2017-4* | Setting the Payment Standards Above 110 Percent of HUD Fair Market Rents | | | X |
| 2019-1* | Graduation Bonus | | X | |
| 2019-2 | Family Self-Sufficiency Program- Waive Contract of Participation Requirements | | X | |

| MTW Statutory Objectives | | | | |
|--|---|---|---|--|
| ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #) | ACTIVITY | REDUCE COST & ACHIEVE GREATER COST EFFECTIVENES S IN FEDERAL EXPENDITURE S | PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY | INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES |
| 2019-3 | Waiving the Requirement that a PHA Re-Determine Rent Reasonableness for Manufactured Home Spaces Annually | X | | |
| 2019-4 | Streamlining the Lease-Up Process | X | | X |
| 2020-1 | Increase Percentage of Project based Vouchers (PBV) | | | X |
| 2020-2 | Interim Housing | | | X |
| 2020-3 | Over Housed/Under Housed Project Based Voucher (PBV) Households | | | X |
| 2020-4 | Rent to Owners & Rent Reasonableness | | | X |
| 2020-5** | Eliminate the 40% of Income Cap at Initial Leasing | | | X |
| 2021-1 | Impose Limits on PBV to HCV Conversion | X | | X |
| 2021-2 | Simplify Minimum Rent Hardship Exemption | X | X | |
| 2022-1* | Homeownership and Asset Limit for Eligibility | X | | |
| 2022-2* | Waive Full-Time Student Income Exclusion for Families Which Earn 80% of Area Median Income | X | | X |
| 2022-3* | Mainstream Turnover Voucher Issuance Flexibility | | | X |
| 2022-4* | Modified PBV Contract Rents | X | X | |
| 2023-02 | Strive Scholarship | | X | |
| 2024-01* | Digital Inclusion | | X | |
| 2024-02* | Rental Assistance for Post-Secondary Education Students with Children | | X | X |
| 2024-03* | Short-Term Bridge Loan | | | X |
| 2024-04 | Streamline Offer of New Lease Process | X | | |
| 2024-05 | Buena Vista Mobile Home Park | | | X |

* Activities Not Yet Implemented

** Activities on Hold

II. General SCCHA Operating Information

A. HOUSING STOCK INFORMATION

i. Planned New Public Housing Units

New public housing units that the MTW PHA anticipates will be added during the Plan Year.

| ASSET MANAGEMENT PROJECT (AMP) NAME AND NUMBER | BEDROOM SIZE | | | | | | TOTAL UNITS | POPULATION TYPE* | # of Uniform Federal Accessibility Standards (UFAS) Units | |
|--|--------------|---|---|---|---|----|----------------|---------------------|---|-----------|
| | 0/1 | 2 | 3 | 4 | 5 | 6+ | | | Fully Accessible | Adaptable |
| None | 0 | 0 | 0 | 0 | 0 | 0 | 0 | None | 0 | 0 |
| None | 0 | 0 | 0 | 0 | 0 | 0 | 0 | None | 0 | 0 |
| None | 0 | 0 | 0 | 0 | 0 | 0 | 0 | None | 0 | 0 |

Total Public Housing Units to be Added in the Plan Year

0

* Select "Population Type" from: General, Elderly, Disabled, Elderly/Disabled, Other

If "Population Type" is "Other" please describe:

N/A

ii. Planned Public Housing Units to be Removed

Public housing units that the MTW PHA anticipates will be removed during the Plan Year.

| AMP NAME AND NUMBER | NUMBER OF UNITS TO BE REMOVED | EXPLANATION FOR REMOVAL |
|------------------------|-------------------------------------|-------------------------|
| None | 0 | N/A |

Total Public Housing Units to be Removed in the Plan Year

0

iii. Planned New Project Based Vouchers

Tenant-based vouchers that the MTW PHA anticipates project-basing for the first time during the Plan Year. These include only those in which at least an Agreement to enter into a Housing Assistance Payment (AHAP) will be in place by the end of the Plan Year. Indicate whether the unit is included in the Rental Assistance Demonstration (RAD).

| PROPERTY NAME | NUMBER OF VOUCHERS TO BE PROJECT-BASED | RAD? | DESCRIPTION OF PROJECT |
|-----------------------|--|------|--|
| 797 Almaden | 35 | No | New construction project consisting of both family and special needs units. Of the 98 total units, 10 family units and 25 units for chronically homeless families will be supported by PBVs. |
| 961 Meridian | 38 | No | New construction family and veterans project. 38 family units will be supported with MTW PBVs, while 35 units for veterans will be supported with HUD-VASH PBVs. |
| Distel Circle | 27 | No | New construction project consisting of 88 total units. 27 MTW PBVs are set aside for large families and chronically homeless families. |
| EAH Blossom Hill | 6 | No | New construction project consisting of 84 total units. 6 family units will be supported with PBVs. |
| Hawthorn | 48 | No | New construction project consisting of 103 total units. 26 family units and 22 chronically homeless units will be supported with PBVs. |
| Magnolias | 23 | No | New construction project consisting of 66 total units. 16 MTW PBV units are set aside for chronically homeless families and 7 units are for veterans supported by HUD-VASH PBVs. |
| Mil on Main | 55 | No | New construction project consisting of 219 total units. 55 MTW PBVs are for large families |
| Mountain View Lot 12 | 25 | No | New construction project consisting of 120 total units. 25 MTW PBV units are for large families. |
| Rincon de los Esteros | 120 | No | Existing project acquired by the Housing Authority. MTW PBVs will support 120 family units |

377

Planned Total Vouchers to be Newly Project-Based

iv. Planned Existing Project Based Vouchers

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP is already in place at the beginning of the Plan Year. Indicate whether the unit is included in RAD.

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|--|----------------------------------|-------------------------------------|------|--|
| 2275 Ellena Dr | 1 | Leased/Issued | No | Family project consisting of 4 units (4 2-bedroom). One PBV unit. |
| 2287 Pasetta Dr | 1 | Leased/Issued | No | Family project consisting of 4 units (4 2-bedroom). One PBV unit. |
| 777 West San Carlos | 16 | Committed | No | New construction project consisting of both family and special needs units. Of the 154 total units, 16 family units will be supported by PBVs. |
| Mariposa Place (formerly 750 West San Carlos) | 40 | Committed | No | New construction family project consisting of 80 total units. 40 PBVs will support the project, directed towards those with special needs. |
| The Algarve | 36 | Committed | No | 91 affordable units, 46 supported by PBVs - 36 for chronically homeless individuals and families, and 10 for HUD-VASH |
| Alum Rock | 26 | Committed | No | New construction family project consisting of 60 total units. 26 family units will be supported with MTW PBVs. |
| Alvarado | 41 | Committed | No | New construction senior project consisting of 90 total units. 41 senior units will be supported with PBVs. |
| Agrihood Senior Apartments | 54 | Committed | No | New construction senior project consisting of 165 total units. 109 of the units will be affordable, and of those 54 will be supported with PBVs for seniors. |
| Anne Way Residence | 4 | Leased/Issued | No | Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over. |
| Auzerais | 64 | Committed | No | Family project consisting of 128 total units. 64 PBVs will support the project, directed toward the homeless and those with special needs. |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|-------------------------------|----------------------------------|-------------------------------------|------|---|
| Bascom | 11 | Committed | No | Family project consisting of 90 total units. 11 will be supported with MTW PBVs and 5 with HUD-VASH PBVs. |
| Bellarmino | 53 | Committed | No | New construction family project consisting of 116 total units. 29 family units and 24 permanent supportive housing units will be supported with PBVs. |
| Blossom Hill Residence | 5 | Leased/Issued | No | Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over. |
| Calabazas | 80 | Leased/Issued | No | New construction family project consisting of 136 units. 80 PBVs will support the project, directed toward the homeless and those with special needs. |
| Carroll Inn | 20 | Leased/Issued | No | Family project consisting of 121 Studio units. PBV units are for disabled persons. |
| Casa De Novo | 27 | Leased/Issued | No | Family project consisting of 56 units. 27 units provide long-term supportive housing, 29 units operate as a hotel offering temporary supportive housing. PBV units are for chronically homeless families. |
| Casa Feliz Studios | 6 | Leased/Issued | No | Family project consisting of 60 studio units. PBV units are for chronically homeless families. |
| Charities Blossom Hill | 49 | Leased/Issued | No | Senior project consisting of 147 total units. 49 PBVs will support the project for seniors with special needs. |
| The Charles | 44 | Committed | No | New construction project consisting of 99 total units. 44 family units will be supported with PBVs. |
| Connell Apartments | 5 | Leased/Issued | No | Family project consisting of 28 units (1 studio, 17 1-bedroom, and 10 2-bedroom). PBV units (2-Bedroom) are for families. |
| Corde Terra Senior Apartments | 199 | Leased/Issued | No | Senior project consisting of 199 1-bedroom units. PBV units are for persons aged 55 years and over. |
| Corinthian House | 6 | Leased/Issued | No | Senior project consisting of 102 units (62 studios and 40 1-bedroom). PBV units (1-bedroom) |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|-----------------------------------|----------------------------------|-------------------------------------|------|--|
| | | | | are for persons aged 62 years and over. |
| Country Hills | 37 | Leased/Issued | No | Family project consisting of 152 units (40 studio, 64 1-bedroom, and 48 2-bedroom). PBV units (8 studio, 16 1-bedroom, and 13 2-Bedroom) are for families. |
| Crescent Terrace | 20 | Leased/Issued | No | Senior project consisting of 48 1-bedroom units. PBV units are for persons aged 62 years and over. |
| Crest Avenue Apartments | 4 | Leased/Issued | Yes | RAD conversion of former Mod Rehab project with four 2-bedroom units. |
| Crossings on Monterey | 20 | Leased/Issued | No | Family, new construction project, consisting of 39 units (6, 1-bedroom, 18, 2-bedroom and 15, 3-bedroom). PBV units are for chronically homeless families. |
| Curtner SRO's | 6 | Leased/Issued | No | Senior project consisting of 6 SRO units. PBV units are for persons aged 62 years and over. |
| Cypress Gardens Senior Apartments | 124 | Leased/Issued | No | Senior project consisting of 124 units (111 1-bedroom and 13 2-bedroom). PBV units are for persons aged 55 years and over. |
| Dent Avenue Apartments | 4 | Leased/Issued | No | Family project consisting of 24 units (6 studio, 12 1-bedroom, and 5 2-bedroom). PBV units (2 SRO and 2 2-bedroom) are for families. |
| Donner Lofts – CHDR | 20 | Leased/Issued | No | Family project consisting of 101 units (92 studio and 9 1-bedroom). PBV units are for chronically homeless families. |
| Eagle Park | 16 | Leased/Issued | No | 14 Studio and 2 1-bedroom units. PBVs are for the chronically homeless and those with special needs. |
| Edwina Benner Plaza | 23 | Leased/Issued | No | Family new construction project consisting of 66 total units. 23 PBVs for families and those with special needs. |
| Eklund Gardens I Apartments | 10 | Leased/Issued | No | Family project consisting of 10 2-bedroom units. PBV units are for families. |
| Eklund Gardens II Apartments | 6 | Leased/Issued | No | Family project consisting of 6 3-bedroom units. PBV units are for families. |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|---|----------------------------------|-------------------------------------|------|--|
| Emerson North | 1 | Leased/Issued | No | Family project consisting of 6 studio units. PBV unit is for families. |
| Emerson South | 1 | Leased/Issued | No | Family project consisting of 6 studio units. PBV unit is for families. |
| Fair Oaks Senior Plaza | 93 | Leased/Issued | No | Senior project consisting of 124 units (11 1-bedroom and 14 2-bedroom). PBV units (80 1-bedroom and 13 2-bedroom) are for persons aged 62 years and over. |
| Fairlands SRO's | 5 | Leased/Issued | No | Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over. |
| Ferne | 1 | Leased/Issued | No | Family project consisting of 16 2-bedroom units. PBV unit is for families. |
| Fuji Towers | 104 | Leased/Issued | No | Senior project consisting of 124 units (72 studio and 68 1-bedroom). PBV units (53 studio and 51 1-bedroom) are for persons aged 62 years and over. |
| Gallup & Mesa | 23 | Leased/Issued | No | New construction family project consisting of 45 total units. 23 PBVs will support the project, directed toward the homeless and those with special needs. |
| Gish Apartments | 6 | Leased/Issued | No | Family project consisting of 35 units (9 studio, 14 2-bedroom, and 12 3-bedroom units). PBV units (3 studio and 3 2-bedroom) are for disabled families. |
| Hillview | 132 | Leased/Issued | No | 132 total units, with 100 supported by Mainstream Program PBVs and 32 PBV units for the chronically homeless. |
| Homestead SRO's | 4 | Leased/Issued | No | Senior project consisting of 4 SRO units. PBV units are for persons aged 60 years and over. |
| Jamesi Village (North San Pedro Apartments) | 60 | Leased/Issued | No | Family and veteran's new construction project, with 135 total units. 60 PBVs will be dedicated to the chronically homeless and 49 for HUD-VASH. |
| Immanuel-Sobrato | 97 | Leased/Issued | No | 106 total units for the chronically homeless, 97 supported with PBVs |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|----------------------------------|----------------------------------|-------------------------------------|------|--|
| Julian Gardens | 9 | Leased/Issued | No | Family, new construction project, consisting of 9 3-bedroom units. PBV units are for families. |
| Kifer Senior | 33 | Leased/Issued | No | New construction project consisting of 80 total units. 33 MTW PBVs will support units for the chronically homeless and 8 HUD-VASH PBVs will support units for veterans. |
| Kings Crossing Apartments | 25 | Leased/Issued | No | Family project consisting of 94 units (34 1-bedroom, 34 2-bedroom, and 26 3-bedroom units). PBV units (9 1-bedroom, 12 2-bedroom, and 4 3-bedroom) are for chronically homeless families. |
| Klee/Offenbach SRO's | 5 | Leased/Issued | No | Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over. |
| La Avenida | 7 | Committed | No | New construction project consisting of 100 total units. 7 units for the chronically homeless will be supported with MTW PBVs and 25 units for veterans will be supported by HUD-VASH PBVs. |
| Laurel Grove Family Apartments | 81 | Leased/Issued | No | Family, new construction project, consisting of 82 units (14 1-bedroom, 43 2-bedroom, and 25 3-bedroom units). PBV units are for families and to be identified special needs and/or chronically homeless families. |
| Leigh Avenue Senior Apartments | 63 | Leased/Issued | No | New construction senior project, 100% PBVs for seniors. |
| Lenzen Gardens Senior Apartments | 93 | Leased/Issued | No | Senior project consisting of 94 units (89 1-bedroom and 5 2-bedroom). PBV units (89 1-bedroom and 4 2-bedroom) are for persons aged 62 years and over. |
| Llewellyn Residence | 5 | Leased/Issued | No | Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over. |
| Lucretia Gardens | 16 | Leased/Issued | No | Family project consisting of 16 3-bedroom units. PBV units are for families. |
| Markham Plaza I (Tully Gardens) | 20 | Leased/Issued | No | 152-unit family project with 10 SRO PBV units for disabled |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|-------------------------|----------------------------------|-------------------------------------|------|--|
| | | | | families and 10 PBV units for chronically homeless families. |
| Maryce Freelen Place | 18 | Leased/Issued | No | Family project consisting of 74 units (24 1-bedroom, 26 2-bedroom, and 24 3-bedroom units). PBV units (2 1-bedroom, 6 2-bedroom, and 10 3-bedroom units) are for families. |
| Met South | 10 | Leased/Issued | No | Family, new construction project, consisting of 31 units (9 studios, 8 1-bedroom, 5 2-bedroom, and 9 3-bedroom). PBV units are for seniors and large families. |
| Miramar Apartments | 16 | Leased/Issued | No | Family project consisting of 16 units (8 1-bedroom and 8 2-bedroom). PBV units are for families. |
| Mitchell Park | 25 | Committed | No | New construction project consisting of 50 total units. 25 MTW PBV units will be set aside for families with special needs. |
| Monroe Street | 8 | Leased/Issued | No | Family project consisting of 65 total units. 8 family units will be supported with PBVs. |
| Monticelli Apartments | 23 | Leased/Issued | No | Family and Senior project consisting of 52 units (25 1-bedroom and 27 3-bedroom). 14 1-bedroom PBV units are for persons aged 62 and over, and 9 3-bedroom PBV units are for families. |
| Monterey Gateway | 37 | Leased/Issued | No | Senior, new construction project, consisting of 75 units (64, 1-bedroom and 11, 2-bedroom). PBV units are for chronically homeless and homeless seniors. |
| Moulton Plaza | 8 | Leased/Issued | No | Family project consisting of 66 units (30 1-bedroom, 26 2-bedroom, and 10 3-bedroom). PBV units (2 2-bedroom, and 6 3-bedroom) are for families. |
| Onizuka Crossing - CHDR | 13 | Leased/Issued | No | Family, new construction project, consisting of 58 units (27 1-bedroom, 11 2-bedroom, and 20 3-bedroom). PBV units (13 1-bedroom) are for chronically homeless families. |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|----------------------------|----------------------------------|-------------------------------------|------|---|
| Opportunity Center | 55 | Leased/Issued | No | Family project consisting of 88 units (70 studios, 12 1-bedroom, and 6 2-bedroom). PBV units (48 studio, 3 1-bedroom, and 4 2-bedroom) are for chronically homeless families. |
| Orchard Ranch (Palomino) | 18 | Leased/Issued | No | Family, new construction project, consisting of 18 total units. PBV units are for large families, those with special needs, and chronically homeless families. |
| Orchard Ranch (Overo) | 8 | Leased/Issued | No | Family, new construction project, consisting of 8 units. PBVs are for those at risk of homelessness. |
| Orchard Ranch (Tobiano) | 14 | Leased/Issued | No | Family, new construction project, consisting of 14 total units. PBVs units are for large families, families at risk of homelessness, and chronically homeless families. |
| Page Street | 27 | Leased/Issued | No | New construction family project consisting of 81 total units. 27 PBVs will support the project, directed toward the homeless and those with special needs. |
| Park Avenue Senior Housing | 99 | Leased/Issued | No | Senior, new construction, 94 1-bedroom, 5 2-bedderoom. PBV units are for persons aged 55 years and over. |
| Parkmoor Apartments | 41 | Committed | No | New construction project with 79 total units. 20 of the PBVs will be for chronically homeless families and 21 PBVs will be for low-income families |
| Parkside Studios | 7 | Leased/Issued | No | Family project consisting of 59 units (58 studios and 1 1-bedroom). PBV units (7 studios) are for chronically homeless families. |
| Parkview Senior Apartments | 24 | Leased/Issued | No | Senior project consisting of 140 1-bedroom units. PBV (24 1-bedroom) units are for persons aged 55 years and over. |
| Pavilion Inn | 21 | Committed | No | Rehabilitation project consisting of 43 units. 21 MTW PBV units are set aside for families with special needs. |
| Poco Way Apartments | 10 | Leased/Issued | No | Family project consisting of 130 units (14 1-bedroom, 54 2- |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|----------------------------------|----------------------------------|-------------------------------------|------|---|
| | | | | bedroom, 54 3-bedroom and 8 3-bedroom units). PBV units (3 1-bedroom, 3 2-bedroom, and 4 3-bedroom) are for families. |
| Pollard SRO's | 5 | Leased/Issued | No | Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over. |
| Quetzal Gardens | 32 | Leased/Issued | No | Family, new construction project, consisting of 70 total units. 32 PBVs dedicated to large families, those with special needs, and the chronically homeless. |
| Renascent Place | 160 | Leased/Issued | No | Family, new construction project, consisting of 160 units. PBV units are for chronically homeless families. |
| Rincon Gardens Senior Apartments | 198 | Leased/Issued | No | Senior project consisting of 200 units (190 1-bedroom and 10 2-bedroom). PBV units (189 1-bedroom and 9 2-bedroom) are for persons aged 55 years and over. |
| Roosevelt Park | 20 | Committed | No | New construction project consisting of 80 total units. 20 family units will be supported with PBVs. |
| Royal Oak Village | 22 | Committed | No | Family project consisting of 73 total units. 22 PBVs will support large families. |
| San Antonio Place | 30 | Leased/Issued | No | Family project consisting of 120 units (118 studio, 1 1-bedroom, and 1 2-bedroom). 30 studio PBV units are for families. |
| San Veron Park Apartments | 6 | Leased/Issued | No | Family project consisting of 32 units (10 2-bedroom, 15 3-bedroom, and 7 4-bedroom). PBV units (3 2-bedroom, 2 3-bedroom, and 1 4-bedroom) are for families. |
| Sango Court | 40 | Leased/Issued | No | Family project consisting of 101 total units. 40 MTW PBVs will support the project, directed toward the homeless and those with special needs. 7 HUD-VASH PBVs will also support the project. |
| Santa Familia | 13 | Leased/Issued | No | Family project consisting of 79 units (30 1-bedroom, 23 2-bedroom, and 26 3-bedroom). |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|----------------------------------|----------------------------------|-------------------------------------|------|---|
| | | | | PBV units (4 1-bedroom, 4 2-bedroom, and 5 3-bedroom) are for families. |
| Second Street Studios | 134 | Leased/Issued | No | Family, new construction project, consisting of 135 units (128 studios, 6 1-bedroom, and 1 2-bedroom units). PBV units are for chronically homeless families. |
| Shorebreeze | 20 | Leased/Issued | No | Family, new construction project, consisting of 61 total units. 20 PBVs for those at risk of homelessness. |
| Sobrato Apartments | 40 | Leased/Issued | No | Existing project with 40 PBVs for chronically homeless families. |
| Sonora Court | 30 | Committed | No | New construction family project consisting of 177 total units. 30 family units will be supported with PBVs. |
| Stevenson House | 10 | Leased/Issued | No | Senior project consisting of 120 studio and 1-bedroom units. PBV units (6 studio and 4 1-bedroom) are for persons aged 62 years and over. |
| Sunnyvale Block 15 | 22 | Leased/Issued | No | New construction project consisting of 90 total units. 22 family units will be supported with PBVs. |
| Sunset Gardens Senior Apartments | 74 | Leased/Issued | No | Senior project consisting of 75 units (70 1-bedroom and 5 2-bedroom). PBV units (70 1-bedroom and 4 2-bedroom) are for persons aged 55 years and over. |
| Tamien Station | 33 | Committed | No | New construction project consisting of 134 total units. 33 family units will be supported with MTW PBVs. |
| Timberwood Apartments | 20 | Leased/Issued | No | Family project consisting of 286 units (84 studios, 164 1-bedroom, and 38 2-bedroom). PBV units (6 studio, 6 1-bedroom, and 8 2-bedroom) are for families. |
| Tyrella Gardens Apartments | 11 | Leased/Issued | No | Family project consisting of 56 units (12 1-bedroom, 32 2-bedroom, and 12 3-bedroom). PBV units (4 1-bedroom, 6 2-bedroom, and 3 3-bedroom) are for families. |

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|--|----------------------------------|-------------------------------------|------|---|
| Vela Apartments (Alum Rock Family Housing) | 29 | Leased/Issued | No | New construction family project consisting of 87 total units. 29 PBVs will support the project, directed towards the homeless and those with special needs. |
| Ventura | 1 | Leased/Issued | No | Family project consisting of 12 1- and 2-bedroom units. One 2-bedroom PBV units is for families. |
| Ventura Apartments | 1 | Leased/Issued | No | Family project consisting of 12 1- and 2-bedroom units. One 2-bedroom PBV units is for families. |
| Veranda | 6 | Leased/Issued | No | Senior, new construction project, consisting of 19 units. 6 studio PBV units are for persons aged 55 years and over. |
| Village at Willow Glen | 20 | Leased/Issued | No | Senior project consisting of 133 units. PBV units (17 1-bedroom and 3 2-bedroom) are for persons aged 55 years and over. |
| Villas at Fourth Street | 93 | Leased/Issued | No | New construction permanent supportive housing project with 93 PBVs for the chronically homeless. |
| Villas on the Park | 83 | Leased/Issued | No | Family project consisting of 83 units. PBVs are for the chronically homeless. |
| Waldo | 3 | Leased/Issued | No | Family project consisting of six 1- and 2-bedroom units. Three 1-bedroom PBV units are for families. |
| Westwood Ambassador | 10 | Leased/Issued | Yes | 10 PBVs units for former Mod Rehab project. |
| Wheeler Manor | 10 | Leased/Issued | No | Senior project consisting of 111 1-bedroom units. PBV units (10 1-bedroom) are for persons aged 62 years and over. |
| Wolfe SRO's | 4 | Leased/Issued | No | Senior project consisting of 4 SRO units. PBV units are for persons aged 60 years and over. |

3,599

Planned Total Existing Project-Based Vouchers

v. Planned Other Changes to MTW Housing Stock Anticipated During the Plan Year

Examples of the types of other changes can include (but are not limited to): units held off-line due to relocation or substantial rehabilitation, local, non-traditional units to be acquired/developed, etc.

PLANNED OTHER CHANGES TO MTW HOUSING STOCK ANTICIPATED IN THE PLAN YEAR

SCCHA does not anticipate holding any units off-line or acquiring or developing any additional local, non-traditional units during the Plan year.

vi. General Description of All Planned Capital Expenditures During the Plan Year

Narrative general description of all planned capital expenditures of MTW funds during the Plan Year.

GENERAL DESCRIPTION OF ALL PLANNED CAPITAL EXPENDITURES DURING THE PLAN YEAR

Construction continues at Alvarado Park Senior Housing (89 units) and Bellarmino Place Family Housing (115 units).

The first phase of the East Santa Clara site (ESC), Hawthorn, will be using MTW funds for planning and pre-development work in FY2025 in addition to starting construction. Subsequent (ESC) phases, including Sage and Trillium, will be using MTW funds for planning and pre-development work as well.

The site at Autumn/Montgomery will use MTW funds in FY2025 for predevelopment and due diligence activities.

Buena Vista and Willows will use MTW funds for planning and pre-development as they prepare for funding applications to leverage outside resources.

As part of the North First Street project (formerly SureStay), located at 1488 N. 1st St, San Jose, SCCHA plans to spend up to \$5M to continue predevelopment activities.

MTW funds are planned for capital repairs and rehabilitation of several newly acquired properties, Jardines Paloma Blanca, Girasol Housing, Las Golondrinas Apartments, and Rincon de los Esteros.

B. LEASING INFORMATION

i. Planned Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA plans to serve at the end of the Plan Year.

| PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH: | PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED** |
|--|--|---|
| MTW Public Housing Units Leased | 48 | 4 |
| MTW Housing Choice Vouchers (HCV) Utilized | 219,588 | 18,299 |
| Local, Non-Traditional: Tenant-Based^ | 4,320 | 360 |
| Local, Non-Traditional: Property-Based^ | 10,920 | 910 |
| Local, Non-Traditional: Homeownership^ | 0 | 0 |
| Planned Total Households Served | 234,876 | 19,573 |

| LOCAL, NON-TRADITIONAL CATEGORY | MTW ACTIVITY NAME/NUMBER | PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED** |
|---------------------------------|--|--|---|
| Tenant-Based | Interim Housing - Activity 2020-2 | 4,320 | 360 |
| Property-Based | Create Affordable Housing Preservation Fund for SCCHA and Affiliate-Owned Properties/Activity 2012-4 | 10,920 | 910 |
| Homeownership | N/A | 0 | 0 |

* "Planned Number of Unit Months Occupied/Leased" is the total number of months the MTW PHA plans to have leased/occupied in each category throughout the full Plan Year.

** "Planned Number of Households to be Served" is calculated by dividing the "Planned Number of Unit Months Occupied/Leased" by the number of months in the Plan Year.

^ In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households to be served, the MTW PHA should estimate the number of households to be served.

ii. Discussion of Any Anticipated Issues/Possible Solutions Related to Leasing

Discussions of any anticipated issues and solutions in the MTW housing programs listed.

| HOUSING PROGRAM | DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS |
|----------------------------|---|
| MTW Public Housing | None |
| MTW Housing Choice Voucher | The Santa Clara County rental market continues to have a low vacancy rate, which leads to difficulties in leasing Housing Choice Vouchers. HCV holders who are looking for housing continue to face extremely high rents and a competitive rental environment. The Housing Authority will implement Small Area FMRs in January, 2025. Community partners continue to assist voucher holders in their housing search. The Development team has a robust pipeline to expand affordable housing supply. Project-Based Vouchers continue to be instrumental in affordable housing production within the County. Approximately 457 MTW PBV units are anticipated to complete construction in FY2025. |
| Local, Non-Traditional | None |

C. WAITING LIST INFORMATION

i. Waiting List Information Anticipated

Snapshot information of waiting list data as anticipated at the beginning of the Plan Year. The "Description" column should detail the structure of the waiting list and the population(s) served.

| WAITING LIST NAME | DESCRIPTION | NUMBER OF HOUSEHOLDS ON WAITING LIST | WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED | PLANS TO OPEN THE WAITING LIST DURING THE PLAN YEAR |
|----------------------------------|-------------|--------------------------------------|---|---|
| Federal MTW Public Housing Units | Site Based | 685 | Closed | No |

| | | | | |
|--|-------------------|---------|----------------|-----|
| Federal MTW Housing Choice Voucher Program | Program Specific* | 36,100* | Open | Yes |
| Project-Based, Local, Non-Traditional MTW Housing Assistance Program | Site Based | 2,400 | Partially Open | Yes |

* SCCCHA's Interest List opened in December 2020. Smaller waiting lists are created by randomly drawing active applicants from its interest lists, as vouchers are available or PBV projects come online.

Please describe any duplication of applicants across waiting lists:

SCCHA has 11 properties where households are assisted through Project-Based, Local, Non-Traditional MTW Housing Assistance Programs. Buena Vista Mobile Home Park does not have a waitlist. There may be duplication of applicants among the remaining lists as applicants can put their name on as many lists as are open. The number of people on the waitlists for the rest of the projects are as follows: 107 for Morrone Gardens, 110 for DeRose Gardens, 91 for El Parador Apartments, 39 for San Pedro Gardens Apartments, 486 for Pinmore Gardens Apartments, 150 for Blossom River Apartments, 600 for Helzer Court Apartments, 260 for Clarendon Apartments, 240 for Bendorf Drive Apartments, 317 for Ford Road Plaza.

ii. Planned Changes to Waiting List in the Plan Year

Please describe any anticipated changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list, during the Plan Year.

| WAITING LIST NAME | DESCRIPTION OF PLANNED CHANGES TO WAITING LIST |
|--|--|
| Federal MTW Housing Choice Voucher Program | There are no planned changes to the waiting/interest list. |

III. Proposed MTW Activities (HUD Approval Requested)

This section describes the MTW activity proposed by SCCHA for implementation in FY2025.

2025-01: SMALL AREA FAIR MARKET RENTS

(Proposed Activity)

Activity Description

SCCHA proposes a modified implementation of Small Area Fair Market Rents (SAFMRs) for setting HCV payment standards. Currently, SCCHA sets payment standards based on the Fair Market Rents (FMRs) that HUD publishes annually for each metropolitan area. The payment standards are used to calculate the maximum subsidy that SCCHA will pay for voucher holders. Under a recent HUD-issued Federal Register Notice (FR-6426-N-01), SCCHA will be required to use SAFMRs, which are based on zip codes, instead of the metro area FMRs. SAFMRs are intended to better reflect the rental market in individual zip codes, making more neighborhoods affordable for voucher holders. SAFMRs increase the value of the voucher in more expensive neighborhoods, but also reduces it in lower-cost neighborhoods.

Santa Clara County has one of the most expensive rental markets in the country. While there are significant variations in market rents by neighborhood, the lack of affordable housing is a challenge impacting all communities in the county. Strategies to affirmatively further fair housing must include expanding affordable housing access to more neighborhoods, as well as preserving affordable housing in low-income communities to mitigate displacement.

The current SAFMR rule requires payment standards set between 90% to 110% of the SAFMR in each zip code. With this requirement, SCCHA estimates it would need to reduce payment standards in 18 ZIP codes, where 7,500 (48%) HCV households currently live, and that 2,400 of these households would get a reduction in subsidy without a hold harmless policy in place. This would have a disproportionate impact on Hispanic and Asian households, as the ZIP codes with the lowest SAFMRs and highest voucher concentrations are in predominately Hispanic/Asian neighborhoods. Housing authorities may adopt a hold harmless policy that would protect existing voucher holders from payment standard decreases as long as the household continues to receive voucher assistance in their current unit. However, it would not apply to new program families or existing program families who lease a new unit with their voucher assistance after the new payment standards go into effect.

SCCHA is proposing to modify the SAFMR rule such that the agency could set payment standards exceeding 110% of SAFMR in certain zip codes to mitigate involuntary displacement. SCCHA may consider multiple factors, including but not limited to:

1. Disparity between SAFMR and actual rents based on third-party market reports and HCV program data,

2. The number of families that would be negatively impacted by a reduction in payment standards,
3. Disparate impacts by race/ethnicity or family types,
4. Alignment with city/county strategies targeting areas for anti-displacement or revitalization efforts.

This flexibility will help SCCHA balance the goals of expanding affordable housing access to more areas, while also preserving affordability in lower-cost communities. SCCHA will continuously monitor the impact and efficacy of its payment standards through metrics such as third-party rental data, per-unit cost, tenant rent burden, locational outcomes, voucher success rates, voucher utilization rates, and total voucher households served.

Relation to Statutory Objectives

This activity supports the statutory objective of increasing housing choice.

Anticipated Schedule for Achieving the Stated Objectives

SCCHA anticipates implementing this activity in this fiscal year, with the new payment standards going into effect January 1, 2025.

Proposed Baseline, Benchmarks, Metrics and Data Collection

Data related to this activity will be collected and retrieved at least annually from the Agency's electronic database. As this activity is implemented, SCCHA may revise the activity's metrics and further quantify and refine its performance baselines and benchmarks.

| Activity 2025-01: Small Area Fair Market Rents | | | | |
|---|----------|-----------|-------------------|---------------------|
| Unit of Measurement | Baseline | Benchmark | Projected Outcome | Benchmark Achieved? |
| HC #2: Units of Housing Preserved | | | | |
| Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box. | 0 | 300 | 300 | N/A |

Cost Implications

SCCHA anticipates that the proposed activity could increase HAP expenditures by an estimated \$1 million in the first year, when compared to implementing a standard hold harmless policy without this activity. SCCHA will monitor actual HAP expenditures after implementation and consider cost impacts when updating payment standards on an annual basis.

Authorization for the Activity

The proposed activity is authorized in Attachment C, Paragraph D, Section 2, Subsection a. of SCCHA's MTW Agreement with HUD and waives certain provisions of Sections 8(o)(1), 8(o)(2),

8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 CFR 982.508, 982.503 and 982.518, as necessary to implement SCCHA's MTW Plan. This authorization is needed to establish local payment standards outside of the basic range of the applicable SAFMRs in certain zip codes.

Rent Reform Impact Analysis, Hardship Case Criteria, Annual Reevaluation and Transition Period

This activity does not qualify as a Rent Reform Initiative.

This activity was made available for public review and included as a proposed activity in the public hearing held for the FY2025 MTW Annual Plan. SCCHA will obtain approval from its Board of Commissioners prior to the activity's implementation. The impact of this activity will be evaluated annually in SCCHA's MTW Report.

IV. Approved MTW Activities (HUD Approval Previously Granted)

To date, SCCHA has had 65 activities approved by HUD. Of these, seventeen were closed out in previous years.

The first four numbers of each activity signify the fiscal year in which each activity was approved. Except where indicated in the activity status explanation, SCCHA does not anticipate any changes or modifications to the activities during the Plan year.

Implemented Activities

ACTIVITY 2009-1: REDUCED FREQUENCY OF TENANT REEXAMINATIONS

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2009 AMENDED: FY2016 and FY2021

DESCRIPTION OF MTW ACTIVITY

This activity, originally implemented in 2009, reduces the frequency of participant reexaminations in the voucher program. Participants with fixed incomes are reexamined every three years and participants with non-fixed incomes are reexamined every two years. In FY2015, SCCHA amended this activity to include its four public housing units under the new reexamination schedule. By including its public housing units under the modified reexamination schedule, SCCHA will be furthering administrative streamlining and labor savings for both its Section 8 and 9 programs. In FY2020, SCCHA re-proposed this activity as a technical amendment in response to the widespread economic disruption caused by the COVID-19 pandemic. The re-proposed activity assigned MTW participants with non-fixed incomes to a three-year regular re-examination cycle, and MTW participants with fixed incomes to a four-year cycle. This re-proposed activity took effect immediately as a technical amendment and ended on June 30, 2023.

UPDATE ON MTW ACTIVITY

SCCHA continues to conduct re-examinations on biennial and triennial cycles.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2009-2: EXPEDITING INITIAL ELIGIBILITY INCOME VERIFICATION PROCESS

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2009 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity allows SCCHA to extend the time in which application documents are valid, from 60 days to 120 days.

UPDATE ON MTW ACTIVITY

Extending the documentation timeframe continues to provide administrative relief, both to applicants and to SCCHA.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2009-5: EXPLORING NEW HOUSING OPPORTUNITIES FOR THE CHRONICALLY HOMELESS

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2011 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

The Chronically Homeless Direct Referral (CHDR) program was implemented in FY2011. The CHDR program increases housing choices and mobility by assisting the homeless population through a more targeted and efficient process than the standard voucher waiting list system. Following a housing-first model, identified chronically homeless families not on the voucher waiting list are referred for project-based housing assistance and connected to case management services with

local service providers. In FY2016 SCCHA amended and extended its agreement with Santa Clara County's Office of Supportive Housing, which administers the referral of applicant and oversees the agencies providing intensive case management services

UPDATE ON MTW ACTIVITY

SCCHA continues to work closely with the County's Office of Supportive Housing to successfully house chronically homeless families throughout the County.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2009-8: 30-DAY REFERRAL PROCESS FOR PROJECT BASED VACANCIES

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2010 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity allows owners to directly refer applicants after 30 days of unsuccessful attempts to fill the Project-Based Voucher (PBV) unit using referrals from the SCCHA waiting list. This activity reduces the vacancy time for owners and the resultant loss in money thus ensuring the continuation of the PBV contract and the affordability of the units for low-income households.

UPDATE ON MTW ACTIVITY

This activity continues to assist PBV property owners in filling vacancies.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2009-9: UTILIZATION OF LOW-INCOME HOUSING TAX CREDIT (LIHTC) TENANT INCOME CERTIFICATION (TIC) FOR INCOME AND ASSET VERIFICATION

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2010 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity, first implemented in 2010, allows SCCHA to utilize the owner-provided Tenant Income Certification (TIC) form required under the Low-Income Housing Tax Credit (LIHTC) Program as its sole method for verification of the family's income and assets when filling PBV vacancies for tax credit units. Prior to implementation, households selected to fill a PBV unit that utilized tax credits had to complete initial eligibility calculations under both the Federal LIHTC regulations (Section 42 of the IRS Code) and the Section 8 PBV regulations (24 CFR 5.657, 5.659).

UPDATE ON MTW ACTIVITY

SCCHA continues to benefit from using the TIC form to streamline the initial eligibility process.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2009-11: PROJECT-BASE 100% OF UNITS IN FAMILY PROJECTS

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2010 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This MTW activity allows SCCHA to project-base more than 25% of the units in housing projects that make supportive services available. Although services must be made available and families must be made aware of and encouraged to participate in these services, families do not need to participate in the supportive services. This MTW activity increases housing choices for low-income families by making the units more attractive to families who do not want or need supportive services.

UPDATE ON MTW ACTIVITY

The activity continues to reduce SCCHA's administrative burden by removing the required compliance monitoring for families living in the "excepted" units (i.e. units above the 25% cap).

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2009-13: COMBINED WAITING LIST FOR THE COUNTY OF SANTA CLARA AND THE CITY OF SAN JOSÉ

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2009 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

In 1976, SCCHA signed an agreement to administer the Housing Choice Voucher program on behalf of the City of San José. This agreement allows SCCHA to operate under one Annual Plan, one Administrative Plan, and one combined MTW Plan for both housing authorities. In accordance with this agreement, this activity was implemented in FY2009 to permit SCCHA to waive regulation 24 CFR 982.404(f) and to continue to operate one combined waiting list for both the City of San José and the County of Santa Clara. This activity allows SCCHA to operate a joint waiting list for the Housing Choice Voucher (HCV) and the Project Based Voucher (PBV) Programs. In FY2021, SCCHA changed the structure of its waiting list system to a permanently open interest list. As with the waiting list, SCCHA operates one combined interest list for both the City of San José and County of Santa Clara.

UPDATE ON MTW ACTIVITY

SCCHA continues to operate the joint interest list for the Housing Choice Voucher (HCV) and the Project-Based Voucher (PBV) Programs.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2009-14: PAYMENT STANDARD CHANGES BETWEEN REGULAR REEXAMINATIONS

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2010 AMENDED: FY2014

DESCRIPTION OF MTW ACTIVITY

This activity allows SCCHA to effectuate an immediate change in voucher size and its

corresponding payment standard when changes in family composition or SCCHA's subsidy size policy occur between regular reexaminations. If the application of the new payment standard results in a decrease in the tenant's rent portion, the interim reexamination effective date will be the first of the month following the change. If the application of the new payment results in an increase in the tenant's rent portion, the interim reexamination effective date will be the first of the month following a 30-day notice to the tenant and owner.

UPDATE ON MTW ACTIVITY

This activity continues to result in Housing Assistance Payment (HAP) cost savings by enabling the new payment standards to take effect at the time of an interim reexamination rather than at the next regular reexamination.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2010-2: EXCLUDING ASSET INCOME FROM INCOME CALCULATIONS FOR FAMILIES WITH ASSETS UNDER \$50,000

PLAN YEAR APPROVED: FY2010 IMPLEMENTED: FY2010 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

SCCHA no longer calculates income received from family assets under \$50,000. Since implementation in FY2010, SCCHA has reduced administrative costs through this activity. SCCHA continues to save costs of staff time previously spent on this task.

UPDATE ON MTW ACTIVITY

SCCHA continues to save on staff time and costs with this activity.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2010-3: APPLYING CURRENT INCREASED PAYMENT STANDARDS AT INTERIM REEXAMINATIONS

PLAN YEAR APPROVED: FY2010 IMPLEMENTED: FY2010 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This MTW activity allows the application of the current payment standard (if the payment standard has increased since the family's last regular reexamination) to the rental assistance calculation at interim reexaminations.

UPDATE ON MTW ACTIVITY

SCCHA continues to benefit from reduced administrative costs and increased housing choice for residents.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2010-4: ALLOCATING PROJECT-BASED VOUCHERS TO SCCHA-OWNED PROJECTS WITHOUT COMPETITION

PLAN YEAR APPROVED: 2010 IMPLEMENTED: 2010 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This MTW activity allows the Agency to select SCCHA-owned housing for project-based assistance without a competitive process, saving both staff time and other costs that would be related to a competitive process. As a result of this activity, SCCHA can cost-effectively and efficiently ensure that these project-based units are available.

UPDATE ON MTW ACTIVITY

SCCHA awarded PBVs to a Housing Authority-owned project, Hawthorn and plans to self-award in FY2025 and following years, for the projects at the East Santa Clara site. The Housing Authority will also use this activity as opportunities are available.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are planned non-significant changes to this activity and its authorizations.

ACTIVITY 2011-1: STREAMLINED APPROVAL PROCESS FOR EXCEPTION PAYMENT STANDARD FOR REASONABLE ACCOMMODATION – HCV

PLAN YEAR APPROVED: FY2011 IMPLEMENTED: FY2011 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity allows SCCHA to approve any requests for an exception payment standard above 110 percent (not to exceed 120 percent) of the published Fair Market Rent (FMR) as a reasonable accommodation for persons with disabilities.

UPDATE ON MTW ACTIVITY

This activity continues to improve SCCHA's responsiveness to the needs of families with members who have disabilities, which provides increased housing choices by enabling them to secure an accessible unit more expeditiously.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2011-2: SIMPLIFY REQUIREMENTS REGARDING THIRD-PARTY INSPECTIONS AND RENT SERVICES

PLAN YEAR APPROVED: FY2011 IMPLEMENTED: FY2011 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

SCCHA implemented this activity to waive the regulatory requirement in which HUD must approve a designated, qualified independent agency to conduct Housing Quality Standards (HQS) inspection and rent reasonableness services for SCCHA-owned units. This qualified independent agency conducts both initial and regularly scheduled HQS inspections, as well as rent reasonable services for initial contracts and requested rent adjustments for SCCHA-owned or -controlled properties. In addition, this activity has allowed SCCHA to waive the second part of the HUD regulation that requires the independent agency to supply copies of each inspection report and rent reasonableness determination to the HUD field office.

In FY2021, SCCHA amended this activity to further eliminate remaining required tasks associated with this HUD requirement. Specifically:

- Establishing contract rents (initial rent to owner and redetermined rent to owner);
- Establishing term of initial and any renewal HAP contract;
- Determining rent reasonableness; and
- Assisting the family in negotiating the rent with the owner.

These requirements still occur but are completed by SCCHA staff. The complete elimination of this requirement by a third-party will continue to decrease costs and increase administrative streamlining at SCCHA.

UPDATE ON MTW ACTIVITY

SCCHA is updating the activity to have PHA-owned units be inspected by SCCHA staff instead of an independent entity. This will expedite the lease-up process for families and to further increase administrative streamlining.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA is updating the activity to allow SCCHA staff to conduct inspections of SCCHA-owned units. There are no changes to the authorizations for this activity.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2012-2: MINIMUM TWO-YEAR OCCUPANCY IN PROJECT-BASED UNIT

PLAN YEAR APPROVED: 2012 IMPLEMENTED: 2015 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

The purpose of the activity is to enhance the occupancy stability in the PBV program. Project-based participants are required to remain in their PBV units for a minimum of two years prior to becoming eligible to request a tenant-based voucher to move with continued assistance.

The activity does not apply to families:

- 1) with an approved reasonable accommodation that requires them to move;
- 2) who experience a change in family composition that affects unit size;
- 3) who present other compelling reasons to move out; or
- 4) who request a move under the Violence Against Women Act (VAWA).

To implement the activity, SCCHA created its own PBV Statement of Family Responsibility and PBV Tenancy Addendum forms to replace the HUD forms. The only change in the SCCHA versions of the forms is the two-year, rather than one-year, PBV residency requirement before tenants may move with continued housing assistance.

UPDATE ON MTW ACTIVITY

SCCHA continues to benefit from occupancy stability in the PBV program.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2012-3: CREATE AFFORDABLE HOUSING ACQUISITION AND DEVELOPMENT FUND

PLAN YEAR APPROVED: FY2012 IMPLEMENTED: FY2012 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity allows SCCHA to use MTW funds to pursue opportunities to build new affordable rental housing units through the acquisition of existing land and/or funding the development of units for new construction or rehabilitation.

UPDATE ON MTW ACTIVITY

SCCHA's development activities will expand in FY2025. Development and financing efforts continue at Alvarado Park Senior Housing (89 units) and Bellarmino Place Family Housing (115 units). The first phase of the East Santa Clara site (ESC), Hawthorn, will be using MTW funds for planning and pre-development work in FY2025 in addition to starting construction. Subsequent ESC phases will be using MTW funds for planning and pre-development work as well. The site at Autumn/Montgomery will use MTW funds in FY2025 for predevelopment and due diligence activities. Buena Vista and Willows will use MTW funds for planning and pre-development as they prepare for funding applications to leverage outside resources. As part of the North First Street project (formerly SureStay), located at 1488 N. 1st St, San Jose, SCCHA plans to spend up to \$5M to continue predevelopment activities.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2012-4: CREATE AFFORDABLE HOUSING PRESERVATION FUND FOR SCCHA AND AFFILIATE OWNED PROPERTIES

PLAN YEAR APPROVED: FY2012 IMPLEMENTED: FY2012 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity allows SCCHA to use MTW funds to assist in its preservation activities and to support the asset management staff that has oversight of the affordable units. The preservation activities include using MTW funds for expenses incurred in rehabilitating the units to extend their useful life and affordability, or to acquire the property or limited partner's interest at the end of the tax credit period to maintain the asset's affordability into the future or pay off existing loans to leverage additional financing.

UPDATE ON MTW ACTIVITY

SCCHA continues to use this activity to preserve the long-term stability and viability of existing SCCHA owned and affiliate owned housing. SCCHA plans to use approximately \$5 million in MTW funds for the rehabilitation of 20 units at San Pedro Gardens Apartments during FY2025. SCCHA is also planning to use approximately \$12M in MTW funds to complete upgrades at the Jardines, Paloma Blanca, Girasol Housing, and Las Golondrinas Apartments, associated with the acquisition from HUD. The Buena Vista Mobile Home Park will also be using funds in FY2025 for pre-development activities.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2013-1: ELIMINATION OF THE EARNED INCOME DISALLOWANCE (EID) CALCULATION

PLAN YEAR APPROVED: FY2013 IMPLEMENTED: FY2015 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity eliminates the HUD-mandated Earned Income Disallowance (EID) calculation to simplify income determination.

UPDATE ON MTW ACTIVITY

SCCHA continues to benefit from the reduction in staff time and costs needed to calculate EID.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2014-4: INCREASED TENANT CONTRIBUTION – UP TO 35% OF GROSS INCOME

PLAN YEAR APPROVED: FY2014 IMPLEMENTED: FY2015 AMENDED: FY2015, FY2024

DESCRIPTION OF MTW ACTIVITY

This activity simplifies the calculation of Total Tenant Payment (TTP) to the higher of between 30 and 35 percent of the participant family's gross monthly income or \$50 (minimum rent). Originally implemented in FY2014, this activity eliminated all standard allowances and deductions, as well eliminated the inclusion of a utility allowance in the tenant rent calculation. The initial implementation of this activity increased the TTP to 35 percent as a cost-saving measure in response to diminished funds resulting from federal sequestration. In September 2014, the TTP was reduced to 32 percent, and then further reduced to 30 percent in February 2022. SCCHA re-proposed this activity in FY2015 to include its four public housing units. This activity provided significant costs savings to SCCHA by reducing the amount of Housing Assistance Payment (HAP) paid to landlords. Additionally, the simplified calculation freed up staff hours by streamlining this task. In FY2024 the range was updated to between 28 and 35 percent of the family's gross monthly income.

UPDATE ON MTW ACTIVITY

This activity provides flexibility to rapidly respond to changes in the rental market. The Housing Authority continues to use the activity to maintain the agency's fiscal health while supporting its residents.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2015-2: PROJECT-BASED VOUCHER INSPECTION SELF-CERTIFICATION

PLAN YEAR APPROVED: FY2015 IMPLEMENTED: FY2015 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity was approved and implemented in FY2015 and allows Project-Based Voucher owners

and tenants to self-certify the correction of reported Housing Quality Standards (HQS) deficiencies within the 30-day period after the initial HQS inspection. This activity only applies to non-life threatening HQS deficiencies. This activity reduces expenditures by eliminating the need for scheduling and conducting a re-inspection.

UPDATE ON MTW ACTIVITY

SCCHA continues to benefit from staff time and cost savings with the streamlined process.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2015-3: MODIFIED ELDERLY DEFINITION FOR PBV

PLAN YEAR APPROVED: FY2015 IMPLEMENTED: FY2015 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

HUD currently defines elderly to be persons aged 62 year or older and elderly families to those whose head, spouse or co-head are 62 years of age or older. This activity modifies the age, for the Project-Based Voucher (PBV) program, at which a person or family is considered elderly from persons aged 62 or older to persons aged 55 or older to align with the definition used by several affordable housing developments in the area. Therefore, PBV sites which define elderly as 55 years of age and older are considered an elderly property.

UPDATE ON MTW ACTIVITY

SCCHA will continue to utilize the activity to align the definition of elderly with many affordable housing developments.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2016-2: STREAMLINING OF PBV SELECTION REQUIREMENTS

PLAN YEAR APPROVED: FY2016 IMPLEMENTED: FY2018 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity enables SCCCHA to select Project-Based Voucher proposals without conducting a competitive selection process where: 1) the proposed project was previously selected for award through any form of open public solicitation or invitation process conducted by a Federal, State, or local government entity, where a proposal is selected subject to funding availability; and 2) the proposed project was selected by the other government entity within the last fifteen years. This activity also eliminates the regulatory requirement that the previous selection process not consider rental assistance for the proposed project and allows proposers to include PBV assistance in their calculations.

UPDATE ON MTW ACTIVITY

SCCCHA continues to benefit from the reduction in staff time and costs needed to complete the PBV selection process.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2017-1: PHASING IN THE SUBSIDY STANDARD CHANGE

PLAN YEAR APPROVED: FY2017 IMPLEMENTED: FY2017 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity allows SCCCHA to change the agency's subsidy standard policy to two persons per bedroom. Under this activity, if a household's voucher size changes due to the subsidy size change, the new voucher size does not take effect for households in a unit under a Housing Assistance Payment contract until (1) the family moves; or (2) the rental market vacancy rate remains five percent or higher for at least six months, whichever occurs first.

UPDATE ON MTW ACTIVITY

SCCCHA and its residents continue to benefit from this displacement prevention activity.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2017-2: SPECIAL NEEDS POPULATION DIRECT REFERRAL PROGRAM

PLAN YEAR APPROVED: FY2017 IMPLEMENTED: FY2019 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity creates an exception to Section 8 waiting list regulations to create a direct referral program for certain special needs populations who are not best served through a waiting list (such as disabled individuals at risk of institutionalization or transition aged youth). This activity gives SCCCHA the flexibility to work directly with community partners to rapidly house and provide supportive services to vulnerable populations.

UPDATE ON MTW ACTIVITY

SCCHA continues to utilize this activity to expand housing opportunities for special needs populations.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2017-3: LANDLORD INITIATIVES

PLAN YEAR APPROVED: FY2017 IMPLEMENTED: FY2017 AMENDED: FY2018, FY2019, & FY2024

DESCRIPTION OF MTW ACTIVITY

This activity increases the number of HCV units that are re-leased to HCV participants, ensuring the long-term viability of units that will be available to HCV low-income tenants and provides an incentive for new owner participation in the HCV program. In 2017, the activity authorized SCCCHA to administer loyalty bonus payments to Section 8 landlords who re-rent their unit to SCCCHA program participants. Re-proposed in 2018, the activity was amended to set the vacancy payment amount for Housing Choice Voucher units to include shared housing units and set the amount to between \$500 and \$1500. Re-proposed again in FY2019, the activity expanded the initiatives to new Section 8 landlords and offered them a one-time bonus payment between \$500 and \$2,500. In FY2023, the loyalty and new landlord incentives were both set to a flat \$1500 payment to streamline the process. In FY2024, the activity expanded the initiatives to include a

landlord assurance fund which reimburses property owners for certain HCV tenant-caused physical damage costs, beyond normal wear and tear that exceed the security deposit amount, up to \$2,500.

UPDATE ON MTW ACTIVITY

The activity allows SCCHA to continue to grow its partnerships with landlords and increase the number of rental units on the program.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

ACTIVITY 2019-2: FAMILY SELF-SUFFICIENCY PROGRAM – WAIVE CONTRACT OF PARTICIPATION REQUIREMENTS

PLAN YEAR APPROVED: FY2019 IMPLEMENTED: FY2019 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity modifies certain aspects of the Family Self Sufficiency (FSS) program to reduce the administrative burdens on both the participant families and SCCHA, while broadening the pool of families who could benefit from the FSS program's escrow savings account. First, the activity eliminates the requirement in the FSS Contract of Participation (CoP) (HUD Form 52560) that enrolling families must have been subject to an income reexamination within 120 days of the enrollment, and instead uses the family income as determined at the last regular reexamination, which may be up to two years prior to enrollment for families which are not on fixed incomes. Second, the activity allows the successful maintained employment of any adult member of the enrolled family – rather than just the Head of Household – to count towards the family's FSS goals. As long as at least one adult family member completes the Individual Training and Services Plan, the family will be considered a "successful FSS completion" and will receive the escrow payout.

UPDATE ON MTW ACTIVITY

SCCHA and FSS participants continue to benefit from the reduction in time and costs needed to complete the CoP requirements.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2019-3: WAIVING THE REQUIREMENT THAT A PHA REDETERMINE RENT REASONABLENESS FOR MANUFACTURED HOME SPACES ANNUALLY

PLAN YEAR APPROVED: FY2019 IMPLEMENTED: FY2019 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity allows SCCHA to eliminate the HUD requirement that a PHA annually re-determine that the current rent to owner is a reasonable rent for rent charged for a manufactured home space. SCCHA continues to perform a full rent reasonableness review at the time of a new contract, owner requested rent changes, tenant request, or when deemed necessary by SCCHA staff.

UPDATE ON MTW ACTIVITY

SCCHA continues to benefit from the reduction in staff time and costs associated with completing the reasonable rent process.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2019-4: STREAMLINING THE LEASE UP PROCESS

PLAN YEAR APPROVED: FY2019 IMPLEMENTED: FY2019 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity was designed to alleviate the delays associated with the processing and completion of the Request for Tenancy Approval (RFTA) packet, tenancy addendum, and lease. HUD approved a waiver of 24 CFR §982.162 and §982.308 as necessary to change the requirement of using Form HUD-52517 and to simplify and streamline what constitutes an approvable lease.

SCCHA created a new RFTA form that consolidated certain sections which required owners to input duplicative information. Additionally, SCCHA created a "Mandatory Lease Information" form which acts as an addendum to the owner's lease agreement. The goal of this form is to save

staff time by providing the information HUD requires to be in the owner’s lease on a single page that the tenant and owner will sign and submit along with the lease. This will save staff time because they will no longer need to sift through the entire lease to find the HUD required elements and simultaneously achieve faster approval of the HAP contract for owners.

UPDATE ON MTW ACTIVITY

SCCHA, owners, and residents continue to benefit from the reduction in time and costs associated with completing the lease up process.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2020-1: PBV PROGRAM CAP

PLAN YEAR APPROVED: FY2020 IMPLEMENTED: FY2020 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity was approved in FY2020 and raises the percentage cap for the Housing Authority of the City of San José (HACSI) and the Santa Clara County Housing Authority (SCCHA) to 40% of the respective baseline number of vouchers and removes the restrictions on the types of allowable units.

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity to increase affordable housing units in the community.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2020-2: INTERIM HOUSING

PLAN YEAR APPROVED: FY2020 IMPLEMENTED: FY2020 AMENDED: FY2024

DESCRIPTION OF MTW ACTIVITY

This activity was approved in FY2020 and creates a local rental subsidy program to assist special needs populations. SCCHA is partnering with the City of San Jose and the County of Santa Clara to provide interim (short-term) housing to individuals and families who are approved for a Permanent Supportive Housing (PSH) unit to which SCCHA has attached a PBV, but the unit is not yet ready for occupancy. The interim housing will move these highly vulnerable clients off the street while they await their permanent home and will provide stability and allow case managers to begin engaging with the clients. In FY2024, this activity was expanded to include providing funding for scattered site interim housing where the families housed aren't necessarily voucher holders and with partners other than just the City of San Jose and Santa Clara County. The Housing Authority will ensure compliance with HQS and other requirements set forth in PIH Notice 2011-45.

UPDATE ON MTW ACTIVITY

SCCHA and the County entered into an Agreement for services for Pedro Street Interim housing on December 1, 2020. The first residents moved into the Pedro Street property in May 2021. In the first half of FY22 SCCHA and the County's Office of Supportive Housing collaborated to change the time of applicant move-in from after SCCHA approval to upon referral by the local Continuum of Care. If and when the applicant is approved by SCCHA, SCCHA pays for the interim housing costs from the time of move in until the permanent unit is ready for lease up. This change allows the applicant to be safely and stably housed while going through the eligibility processes of the property and SCCHA, instead of after SCCHA approval, which could be weeks to months after the original referral.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2020-3: OVER HOUSED/UNDER HOUSED PBV HOUSEHOLDS

PLAN YEAR APPROVED: FY2020 IMPLEMENTED: FY2020 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity modifies SCCHA's subsidy standards for the Project-Based Voucher program such that if a family is over-housed or under-housed but not in violation of Housing Quality Standards space standards, the family may remain in the wrong-sized unit if the rental market vacancy rate is below five percent until (1) an appropriately-sized unit becomes available at the project; or (2)

the family requests a tenant-based voucher, whichever occurs first.

UPDATE ON MTW ACTIVITY

SCCHA and its residents continue to benefit from this displacement prevention activity.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2020-4: RENT TO OWNERS & RENT REASONABLENESS

PLAN YEAR APPROVED: FY2020 IMPLEMENTED: FY2020 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

HUD regulations require that during an assisted tenancy, the rent paid to owner cannot exceed the reasonable rent as determined by the Public Housing Authority (in comparison with comparable units in the current rental market). Occasionally, upon an owner's request for a rent adjustment of a specific amount (which can be done annually), the reasonable rent for the unit according to rental comparisons of similar units will not only **not** support the increased rent amount the owner is requesting but will be lower than the current approved rent for the unit. In these situations, HUD regulations require that SCCHA reduce the approved contract rent to reflect the current reasonable rent.

This activity waives the requirement to reduce the approved contract rent in these circumstances. Instead, SCCHA only reduces the approved contract rent in those cases (identified through owner-initiated rent increases) where the HUD-issued Fair Market Rents (FMRs) for the applicable bedroom size have dropped by 10% or more since the unit's last rent reasonableness review.

UPDATE ON MTW ACTIVITY

SCCHA and its residents continue to benefit from this displacement prevention activity.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2021-1: IMPOSE LIMITS ON PBV TO HCV CONVERSION

PLAN YEAR APPROVED: FY2021 IMPLEMENTED: FY2022 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity waives the requirement that PBV tenants whom have resided in a PBV unit for the minimum period and request to move receive priority for continued tenant-based assistance. The activity limits PBV to HCV conversions to 10% of the number of HCVs that SCCCHA will issue each year. The HCVs available for PBV to HCV conversions will be issued to interested and qualified PBV tenants on a first-come, first-served basis. When all the available HCVs have been issued, any remaining interested and qualified PBV tenants will be carried over to the following year.

UPDATE ON MTW ACTIVITY

SCCCHA continues to benefit from staff time and cost savings with this activity.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the metrics nor data collection for this activity.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2021-2: MINIMUM RENT HARDSHIP EXEMPTION

PLAN YEAR APPROVED: FY2021 IMPLEMENTED: FY2022 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity replaces HUD's Minimum Rent Hardship exemption with a simpler policy that better addresses the needs of SCCCHA's participants. SCCCHA's policy does not differentiate between a temporary and long-term hardship and does not require staff to track and receive payments from participants after the hardship waiver is lifted.

Minimum rent is suspended beginning the first of the month following the hardship request and will continue until the family submits new sources of income. If SCCCHA determines there is no longer a financial hardship, the minimum rent will be reinstated on the first of the month following the determination.

UPDATE ON MTW ACTIVITY

SCCCHA continues to benefit from staff time and cost savings with this activity.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, nor benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

2022-3: MAINSTREAM TURNOVER VOUCHER ISSUANCE FLEXIBILITY

PLAN YEAR APPROVED: FY2022 IMPLEMENTED: FY2022 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity waives the PIH Notice 2020-01 requirements to issue turnover vouchers to waitlist applicants and allows SCCHA to issue turnover vouchers to applicants who have been directly referred by SCCHA's partner agency. The 2017, 2018, and 2019 Mainstream Voucher Program Funding Opportunities encourage PHAs to partner with local Continuum of Care agencies for direct referrals and to create a preference for homeless or at-risk of homelessness Mainstream participants. In cases where eligible direct referral applicants who meet the preference for homelessness, at-risk of homelessness, institutionalized, or at-risk of institutionalization are unavailable, SCCHA plans to continue to utilize the interest/waiting list to fill Mainstream Program turnover vouchers.

UPDATE ON MTW ACTIVITY

SCCHA and its waitlist applicants continue to benefit from the direct referral process.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the metrics nor data collection for this activity.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2023-2: STRIVE SCHOLARSHIP

PLAN YEAR APPROVED: FY2023 IMPLEMENTED: FY2023 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

The Strive Scholarship is an important part of SCCHA's Section 8 Program. The annual scholarships are awarded as unrestricted funds which can be used to offset the cost of tuition, fees, books, high-speed internet, transportation, groceries, or any other student-identified need. SCCHA

allocates up to \$75,000 per year, which is divided among eligible applicants. The Housing Authority will supplement with non-MTW funds for awardees who are residents of an affiliate property or those who would otherwise not be eligible for an MTW award.

Eligibility requirements are recipient of housing assistance through a subsidy program or a resident in an affiliate property, GPA of 2.5 and above, full-time enrollment in a course of study, received no more than three previous awards, a written recommendation, and a description of educational and professional goals.

Housing Authority staff review the applications and conducts the scoring evaluation in preparation for the awards and annual award celebration.

UPDATE ON MTW ACTIVITY

SCCHA and its residents continue to benefit from the Scholarship awards.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the metrics nor data collection for this activity.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2024-4: STREAMLINE OFFER OF NEW LEASE PROCESS

PLAN YEAR APPROVED: FY2024 IMPLEMENTED: FY2024 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

This activity streamlines its Offer of New Lease process by waiving the requirement to execute a new HAP contract due to changes in lease requirements governing utility or appliance responsibilities or the term of the lease. Staff will continue to update files and communicate changes to all parties involved. This waiver will alleviate staff time and costs associated with the completion of a HAP contract, tenancy addendum, and lease.

UPDATE ON MTW ACTIVITY

SCCHA implemented the activity for Offer of New Lease requests submitted after HUD approval of the FY2024 Plan.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the metrics nor data collection for this activity.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

2024-5: BUENA VISTA MOBILE HOME PARK

PLAN YEAR APPROVED: FY2024 IMPLEMENTED: FY2024 AMENDED: N/A

DESCRIPTION OF MTW ACTIVITY

SCCHA and local partners purchased and improved the infrastructure and quality of life for the residents at Buena Vista Mobile Home Park to preserve affordable housing and prevent imminent displacement of residents living in one of the highest cost cities in the county. This activity provides Housing Choice Vouchers to residents who are permanently relocated, creates a direct referral program that allows residents who currently reside at the park to receive a project-based voucher upon move-in to their new permanent unit onsite, and provides project-based housing assistance to mobile home units. These flexibilities allow SCCHA to provide stability for residents during the redevelopment process.

UPDATE ON MTW ACTIVITY

SCCHA implemented the activity upon HUD's approval of the FY2024 Plan.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity nor its authorizations.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the metrics nor data collection for this activity.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity nor its authorizations.

Activities Not Yet Implemented

2017-4: SETTING THE PAYMENT STANDARDS ABOVE 110 PERCENT OF HUD FAIR MARKET RENTS (ORIGINALLY PROPOSED AS ACTIVITY 2017-1)

PLAN YEAR APPROVED: FY2017

This activity provides the flexibility to set SCCHA payment standards higher than 110 percent of the Fair Market Rent (FMR), if necessary, without HUD approval. This activity will give SCCHA participants the ability to be more competitive in the high priced and volatile Santa Clara County rental market.

This activity is intended to increase the probability of participants securing a rental unit in a tight, high-cost rental market. Currently, Santa Clara County is experiencing a stabilizing of the rental market such that SCCHA has not needed to implement this activity. SCCHA may implement this activity when the Santa Clara County housing market experiences another surge in cost.

There are no changes to the activity's metrics, baselines, nor benchmarks.

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations.

2019-1: GRADUATION BONUS

PLAN YEAR APPROVED: FY2019

PLAN YEAR AMENDED: FY2022

This activity, re-proposed and approved in FY2022, reduces the time a zero HAP participant's assistance is terminated from 180 days to 60 days. Families with annual incomes at or above 80% of Area Median Income (AMI) will be paid a graduation bonus of \$2,000 per eligible individual and removed from the Section 8 program 60 days after the family's income has been certified by SCCHA and written notice has been sent to the family. The re-proposed activity relies on a more accurate measure of self-sufficiency by basing the expedited graduation criteria on income rather than housing assistance level, which could penalize families who rent cheaper units. This activity is intended to increase the number of vouchers available to new families and to provide a financial cushion for graduating families.

This activity was on hold while SCCHA was in the process of changing the structure of its waiting list to a permanently-open interest list, which was launched in FY2021. HUD approved the re-proposed activity in FY2022.

There have not been any non-significant changes or modifications to the MTW activity since it was approved by HUD in FY2022.

2022-1: HOMEOWNERSHIP AND ASSET LIMIT FOR ELIGIBILITY

PLAN YEAR APPROVED: FY2022

This activity makes the following applicants ineligible for SCCHA's Section 8 program:

- Those with \$100,000 or more in assets per family member; and
- Those with a present ownership interest in a suitable home in which they have a legal right to reside in Alameda, Contra Costa, Marin, Merced, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, San Benito, Solano, and Stanislaus Counties.

Units excepted from this rule are those that are part of SCCHA's homeownership program, units not suitable for occupancy (i.e. vacant land or condemned properties), units jointly owned with a non-household member, and those owned by VAWA participants.

There are no changes to the activity's metrics, baselines, nor benchmarks.

A planned non-significant modification to this activity is a change to the definition of "asset" as noted above. The principal and interest in a 401(k) plan, 403(b) plan, IRA, 457 plan, 529 college savings plan, or Coverdell ESA, will not be considered an asset when determining if the family is eligible for a voucher. These funds will be included when calculating asset income for the family.

2022-2: WAIVE FULL-TIME STUDENT INCOME EXCLUSION FOR FAMILIES WHICH EARN 80% OF AREA MEDIAN INCOME

PLAN YEAR APPROVED: FY2022

This activity allows SCCHA to count income which would be excluded under 24 CFR 5.609(c)(11) towards a family's annual income calculation. 24 CFR 5.609(c)(11) requires SCCHA, when calculating annual income for a family with a full-time student 18 years or older, to exclude all the income of that full-time student in excess of \$480. Under this activity, SCCHA will exclude full-time student income in excess of \$480 only when the family's total annual income (before exclusion of any full-time student income) falls below 80 percent of the Santa Clara County area median income (AMI) applicable for that family's size.

There are no changes to the activity's metrics, baselines, nor benchmarks.

There have not been any non-significant changes or modifications to the MTW activity since it was approved by HUD.

2022-4: MODIFIED PBV CONTRACT RENTS

PLAN YEAR APPROVED: FY2022

This activity waives 24 CFR 983.301(b) and 24 CFR 983.302 for PBV HAP contract renewals. For PBV HAP contract renewals, SCCHA is allowed to set PBV contract rents at a lower amount in cases where project underwriting analysis shows that there will be material excess cash flow. For larger projects with excess cash flow, contract rents would be limited to as low as 80% of FMR (for projects with 40 to 59 units) and as low as 70% of FMR (for projects with 60 or more units).

The following types of projects would not be subject to the lower contract rent limit:

- Projects with 39 or fewer units;
- Projects in which PBVs comprise 25% or less of the total units;
- Projects with a Debt Service Coverage Ratio (DSCR) of 1.3 or below for the first year of contract renewal;
- Projects with a DSCR in any year of the HAP renewal contract term below 1.0; or
- LIHTC financed projects that can't meet the True Debt Test (that the debt incurred for a Low Income Housing Tax Credit project is a "true debt" for tax purposes).

There are no changes to the activity's metrics, baselines, nor benchmarks.

There have not been any non-significant changes or modifications to the MTW activity since it was approved by HUD.

2024-1: DIGITAL INCLUSION

PLAN YEAR APPROVED: FY2024

To address the well-documented gap or "digital divide" separating low-income households from access to technology and broadband internet, the Housing Authority implemented a pilot program with a local partner to provide devices and training to community members who are at 80% AMI or below. The pilot includes 500 tablets to be distributed to community members at digital literacy workshops.

There are no changes to the activity's metrics, baselines, nor benchmarks.

There have not been any non-significant changes or modifications to the MTW activity since it was approved by HUD.

2024-2: RENTAL ASSISTANCE FOR STUDENT PARENTS OBTAINING POST-SECONDARY EDUCATION

PLAN YEAR APPROVED: FY2024

This local non-traditional activity secures funds for a service organization to provide housing, academic and career coaching, and childcare to low-income families while they complete their post-secondary education program. The dual-generation education support model will empower low-income families to complete their educational goals while their children receive care that supports their cognitive, social, and emotional development, thus leading families to financial stability and self-reliance.

Applicants referred from the service provider must meet HCV eligibility requirements, be a parent to at least one minor child, and can provide verification of school enrollment. SCCHA and its partners will collaborate to develop program components based on best practices. The participant will receive preference for the HCV program upon completion of their educational program.

This activity will be implemented once a service organization has been identified.

There are no changes to the activity's metrics, baselines, nor benchmarks.

There have not been any non-significant changes or modifications to the MTW activity since it

was approved by HUD.

2024-3: SHORT TERM BRIDGE LOAN

PLAN YEAR APPROVED: FY2024

This activity is another in the Housing Authority's arsenal of tools to increase the housing supply within the County. The short-term loan will provide flexible financing for development of affordable multi-family rental and supportive housing done by nonprofit organizations or limited partnerships and single asset entities with nonprofit sponsors. Funds can be used for predevelopment, acquisition, construction and rehabilitation bridge financing. Projects will include recordation of an affordability restriction on the property. Loans up to \$1 million will require a three-year period of affordability; loans more than \$1 million but less than \$5 million will require a five-year period of affordability; and loans more than \$5 million but less than \$10 million will require a ten-year period of affordability.

Full repayment of the principal of the short-term loans is intended to be made prior to occupancy of the completed project but may be extended to no later than the end of the period of affordability at the sole discretion of the Housing Authority. Interest accrued on all loans will be deferred and due no later than the end of the period of affordability. The land use restriction will terminate upon payment of both principal and interest. Once repaid, funds will be used for an MTW eligible purpose.

There are no changes to the activity's metrics, baselines, nor benchmarks.

There have not been any non-significant changes or modifications to the MTW activity since it was approved by HUD.

Activities On Hold

ACTIVITY 2010-5: ASSISTING OVER-INCOME FAMILIES RESIDING AT SCCHA-OWNED PROJECT-BASED VOUCHER PROPERTIES

This activity waives PBV regulations relating to preference for in-place families who reside in former public housing to continue to commit tax-exempt bonds and tax credits to the disposed public housing properties. Families with income below the PBV limit, but above the tax credit limit, will receive Section 8 voucher and relocation assistance. This activity helps maintain the affordability of units that would otherwise become unaffordable to very low-income families by applying tax credits in unison with PBV assistance. It also increases housing choices for low-income families by preserving and improving the affordable housing stock in Santa Clara County.

Since this activity was implemented in 2011, SCCHA has had no need to use this waiver as no families have exceeded the income threshold. Only one public housing project (Deborah Drive) remains that could potentially benefit from this activity and there are no plans at this time to dispose of this property. Therefore, SCCHA has placed this activity on hold indefinitely but could re-implement when the last public housing project is eliminated.

There are no changes to the activity's metrics, baselines, nor benchmarks. SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations.

Closed Out Activities

| ACTIVITY | WHY THE ACTIVITY WAS CLOSED | YEAR CLOSED |
|--|--|---|
| 2009-3 Reduced Frequency of Inspections | Effective July 2014, Public Housing Agencies (PHAs) can inspect units during the term of the Housing Assistance Payment (HAP) contract at least biennially instead of annually. There is no longer a need to waive HUD regulations to conduct biennial inspections. | This activity was closed out in FY2015 |
| 2009-4 Timeline to Correct HQS Deficiencies | Handhelds are now utilized by the inspections team at every regularly scheduled inspection. These devices can record the non-life-threatening deficiency directly into the newly implemented software, which then immediately generates the deficiency notification letter. There is no longer a lag time between the date of the inspection and the date of the letter. | This activity was closed out in FY2012 |
| 2009-6 20% Sample Inspections Annually for PBV Units | After the approval of this activity, HUD issued PIH Notice 2008-14, in which HUD stipulates that a PHA may now renew or extend Project-Based Certificate Housing Assistance Payment (HAP) contracts as Project-Based Voucher HAP contracts in accordance with the regulations governing the PBV program at 24 CFR Part 983. This activity was never implemented. | This activity was closed out in FY2009 |
| 2009-7 Project-Based Unit Substitution | After the approval of this activity, HUD issued PIH Notice 2008-14, in which HUD stipulates that a PHA may now renew or extend Project-Based Certificate Housing Assistance Payment (HAP) contracts as Project-Based Voucher HAP contracts in accordance with the regulations governing the PBV program at 24 CFR Part 983. Therefore, this activity was never implemented. | This activity was closed out in FY2009 |
| 2009-10 Selection of SCCHA-Owned Public Housing Projects for PBV without Competition | SCCHA utilizes MTW Activity 2010-4, which allows the Agency to select any of its properties for PBV assistance without a competitive process, including public housing units. Therefore, this activity is no longer necessary. | This activity was closed out in FY2015 |
| 2009-12 Adopt Investment Policies | SCCHA's Board of Commissioners annually adopts investment policies in accordance with the California Government Code (CGC) Sections 5922 and 53601. California law, which SCCHA cannot waive, is consistent with and, in fact, more restrictive than the provisions of federal regulations Section 6 (c) (4) of the 1937 Act and 24 CFR 982.156. Therefore, this activity was never implemented. | This activity was closed out in FY2009 |

| ACTIVITY | WHY THE ACTIVITY WAS CLOSED | YEAR CLOSED |
|--|---|---|
| 2010-1 Eliminating 100% Excluded Income from the Income Calculation Process | With the publication of PIH Notice 2013-4, issued January 28, 2013, the verification and calculation of 100% excluded income is no longer required. Therefore, SCCHA eliminated this activity in FY2013. This activity saved labor time and costs. | This activity was closed out in FY2013 |
| 2012-1 Create Standard Utility Allowance Schedule | SCCHA utilizes MTW Activity 2014-4, which simplifies the rent calculation method and eliminates utility allowances. Because of Activity 2014-4, MTW Activity 2012-1 is no longer necessary and was closed out prior to implementation. | This activity was closed out in FY2013 |
| 2012-5 Expand Tenant Services at SCCHA Owned or Affiliate Properties | Tenant services can be expanded with single fund flexibility and this activity is no longer needed. | This activity was closed out in FY2023 |
| 2014-1a & 2014-1b Focus Forward Program (and amendments) | After reviewing the outcomes of time-limited voucher programs, SCCHA determined this pilot program did not meet the needs of the local community and close it out prior to implementation. | This activity was closed out in FY2022 |
| 2014-2 Eliminate Requirement to Re-Determine Rent Reasonableness when HUD decreased Fair Market Rent | This activity was closed out prior to being implemented because HUD regulations made this activity moot. | This activity was closed out in FY2022 |
| 2014-3 Freeze on Contract Rent Increases | This activity no longer serves the needs of our local community. | This activity was closed out in FY2023 |
| 2015-1 Using UPCS or Local Inspection Standards to Determine Housing Quality Standards | On June 25, 2014, HUD published in the Federal Register that, effective July 1, 2014, "A PHA may comply with the biennial inspection requirement through reliance upon an inspection conducted for another housing assistance program. If a PHA relies on an alternative inspection to fulfill the biennial inspection requirement for a particular unit, then the PHA must identify the alternative standard in its administrative plan." Therefore, this activity was closed without implementation because HUD's directive superseded this activity. | This activity was closed out in FY2015 |
| 2016-1 Restriction on Head of Household Changes | This activity was intended to be implemented when the Focus Forward Program (Activity 2014-1a/1b) was implemented. Activity 2014 1a/1b was not implemented and was closed in FY2022. | This activity was closed out in FY2022 |

| ACTIVITY | WHY THE ACTIVITY WAS CLOSED | YEAR CLOSED |
|--|--|---|
| 2018-1 Strengthening Partnerships through Capacity Building | This activity was intended to be implemented when the Focus Forward Program (Activity 2014-1a/1b) was implemented. Activity 2014 1a/1b was not implemented and was closed in FY2022. | This activity was closed out in FY2022 |
| 2020-5 Eliminate the 40% of Income Cap at Initial Leasing | Implemented during the COVID-19 pandemic to provide more housing options in a volatile rental market. Closed out at the request of a community partner as the threshold of 40% was too burdensome for families. | This activity was closed out in FY2021 |
| 2020-6 Reduced Frequency of Periodic Inspections (Not Implemented/On-Hold) | This activity was proposed in a technical amendment to the FY 2020 MTW Annual Plan shortly after Santa Clara County imposed Shelter in Place orders in response the COVID-19 pandemic and was implemented immediately upon Plan approval. On April 13, 2020, SCCHA adopted COVID-19 waiver HQS-5 and resumed performance of biennial HQS inspections. Families who are uncomfortable allowing the performance of an inspection could cancel biennial HQS inspections and have the inspection rescheduled to a later date removing the need to move to a three-year regular HQS inspection cycle as proposed by this activity. Under HUD COVID-19 Waiver HQS-5 SCCHA must inspect units with delayed inspections by June 30, 2022. SCCHA will continue to allow families to cancel scheduled biennial HQS inspections until December 21, 2021. Because of HQS-5 SCCHA did not re-propose this activity in a subsequent MTW Annual Plan. | This activity was closed out in FY2021 |

V. Planned Application of MTW Funds

The information reported in Section V. serves as a placeholder until the FY2025 budget is approved by the SCCHA Board of Commissioners. At the time the FY2025 budget is approved (June 2024) SCCHA will update Section V. and re-submit the Plan to HUD.

A. PLANNED APPLICATION OF MTW FUNDS

i. Estimated Sources of MTW Funds

| FDS LINE ITEM NUMBER | FDS LINE ITEM NAME | DOLLAR AMOUNT |
|--|--|---------------|
| 70500 (70300+70400) | Total Tenant Revenue | |
| 70600 | HUD PHA Operating Grants | |
| 70610 | Capital Grants | |
| 70700 (70710+70720+70730+70740+70750) | Total Fee Revenue | |
| 71100+72000 | Interest Income | |
| 71600 | Gain or Loss on Sale of Capital Assets | |
| 71200+71300+71310+71400+71500 | Other Income | |
| 70000 | Total Revenue | \$ |

Note 1: Source in Analysis

ii. Estimated Application of MTW Funds

| FDS LINE ITEM NUMBER | FDS LINE ITEM NAME | DOLLAR AMOUNT |
|---|----------------------------------|---------------|
| 91000 (91100+91200+91400+91500+91600+91700+91800+91900) | Total Operating - Administrative | |
| 91300+91310+92000 | Management Fee Expense | |
| 91810 | Allocated Overhead | |
| 92500 (92100+92200+92300+92400) | Total Tenant Services | |
| 93000 (93100+93600+93200+93300+93400+93800) | Total Utilities | |
| 93500+93700 | Labor | |
| 94000 (94100+94200+94300+94500) | Total Ordinary Maintenance | |

| | | |
|---|--|--|
| 95000 (95100+95200+95300+95500) | Total Protective Services | |
| 96100 (96110+96120+96130+96140) | Total Insurance Premiums | |
| 96000 (96200+96210+96300+96400+96500+96600+96800) | Total Other General Expenses | |
| 96700 (96710+96720+96730) | Total Interest Expense & Amortization Cost | |
| 97100+97200 | Total Extraordinary Maintenance | |
| 97300+97350 | HAP + HAP Portability-In | |
| 97400 | Depreciation Expense | |
| 97500+97600+97700+97800 | All Other Expense | |
| 90000 | Total Expenses | |

Please describe any variance between Estimated Total Revenue and Estimated Total Expenses:

iii. Description of Planned Application of MTW Single Fund Flexibility

| PLANNED USE OF MTW SINGLE FUND FLEXIBILITY | | |
|--|--|--|
| | | |

iv. Planned Application of PHA Unspent Operating Fund and HCV Funding

| Original Funding Source | Beginning of FY - Unspent Balances | Planned Application of PHA Unspent Funds during FY |
|-------------------------|------------------------------------|--|
| HCV HAP* | | |
| HCV Admin Fee | | |
| PH Operating Subsidy | | |
| TOTAL: | | |

| Description of Planned Expenditures of Unspent Operating Fund and HCV Funding |
|---|
| |

B. LOCAL ASSET MANAGEMENT PLAN

- i. Is the MTW PHA allocating costs within statute?
- ii. Is the MTW PHA implementing a local asset management plan (LAMP)?
- iii. Has the MTW PHA provide a LAMP in the appendix?
- iv. If the MTW PHA has provided a LAMP in the appendix, please describe any proposed changes to the LAMP in the Plan Year or state that the MTW PHA does not plan to make any changes in the Plan Year.

C. RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION

- i. Description of RAD Participation

| RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION |
|---|
| N/A |

- ii. Has the MTW PHA submitted a RAD Significant Amendment in the appendix? A RAD Significant Amendment should only be included if it is a new or amended version that requires HUD approval.
- iii. If the MTW PHA has provided a RAD Significant Amendment in the appendix, please state whether it is the first RAD Significant Amendment submitted or describe any proposed changes from the prior RAD Significant Amendment?

VI. Administrative

Appendix One: Resolution No. 23-17

Appendix Two: Certifications of Payments (HUD 50071)

Appendix Three: Disclosure of Lobbying Activities (SF-LLL)

CITY OF SAN JOSE HOUSING AUTHORITY
RESOLUTION NO. _____

A RESOLUTION OF THE BOARD OF COMMISSIONERS OF THE CITY OF SAN JOSE HOUSING AUTHORITY AUTHORIZING: (A) THE CITY OF SAN JOSE HOUSING AUTHORITY BOARD'S EXECUTIVE DIRECTOR TO SUBMIT A LETTER TO THE SANTA CLARA COUNTY HOUSING AUTHORITY ("SCCHA") BOARD TO SUPPORT THE FEDERAL FISCAL YEAR 2025 MOVING TO WORK ANNUAL PLAN; AND (B) THE EXECUTIVE DIRECTOR OF THE SCCHA BOARD OF COMMISSIONERS TO EXECUTE DOCUMENTS REQUIRED IN CONNECTION WITH THE FEDERAL FISCAL YEAR 2025 MOVING TO WORK ANNUAL PLAN SUBMITTAL IN THE NAME OF THE CITY OF SAN JOSE HOUSING AUTHORITY

WHEREAS, among other activities, Santa Clara County Housing Authority ("SCCHA") administers and manages public housing and approximately 17,000 Housing Choice Vouchers ("Section 8") on behalf of the U.S. Housing and Urban Development ("HUD") to provide rental assistance programs for lower-income families, senior, and persons with disabilities; and

WHEREAS, a 1996 assignment agreement ("1996 Agreement") between the City of San José Housing Authority ("City Housing Authority") and SCCHA transferred to the SCCHA the power to administer and manage the City Housing Authority's Section 8 voucher and other HUD programs; and

WHEREAS, under the 1996 Agreement, SCCHA administers and manages the public housing and rental voucher programs for the City Housing Authority; and

WHEREAS, sixty percent (60%) of the vouchers managed by SCCHA are allocated by HUD to SCCHA under its own name and forty percent (40%) of the vouchers managed by SCCHA are allocated by HUD to the City Housing Authority's name; and

WHEREAS, included in the 1996 Agreement between the City Housing Authority and the SCCHA is a requirement that the SCCHA consult with the City Housing Authority and obtain approval of any significant policy decisions regarding administration of the transferred City Housing Authority programs; and

WHEREAS, Moving to Work (“MTW”) was established by Congress in 1996, and is a federal demonstration program that links broad federal goals with locally-designed initiatives and encourages selected housing authorities to propose and, upon HUD approval, implement innovative changes to the way in which affordable housing programs are administered in order to meet at least one of the following three broad federal goals: (1) to decrease costs and increase cost effectiveness in housing program operations; (2) to promote participants’ economic self-sufficiency; and (3) to expand participants’ housing choices; and

WHEREAS, in 2008, SCCHA entered into an agreement with HUD to become an MTW agency and make the City Housing Authority an MTW agency for a term that will expire in 2028; and

WHEREAS, each year, the SCCHA releases an MTW Annual Plan describing new policies that may be implemented as part of its MTW Program, and once HUD approves the proposed policies, the SCCHA can implement those policies through programs that meet the housing needs of the local community; and

WHEREAS, the MTW Annual Plan is a major policy document which includes numerous policies and guidelines impacting the use, administration management, and oversight of the SCCHA and City Housing Authority rental voucher programs; and

WHEREAS, SCCHA currently sets Housing Choice Voucher payment standards based on the Fair Market Rents that HUD publishes annually for each metropolitan area; and

WHEREAS, beginning in 2025, SCCHA will be required to instead use Small Area Fair Market Rents based on zip codes instead of metro area; and

WHEREAS, Small Area Fair Market Rents enable higher payment standards in more expensive zip codes, which increases the number of units affordable in higher opportunity areas, but it would also reduce payment standards in lower-cost zip codes, where many voucher households currently live; and

WHEREAS, under the Federal Fiscal Year 2025 MTW Annual Plan, SCCHA is proposing a modified implementation of Small Area Fair Market Rents which will allow the SCCHA to have the flexibility to set payment standards above the HUD allowable range in target zip codes in order to mitigate the negative impacts on current and future voucher households and prevent involuntary displacement; and

WHEREAS, the MTW Annual Plan must be submitted for consideration to HUD by April 15, 2024 and the City Housing Authority approval will allow SCCHA officials to sign the MTW Annual Plan on behalf of the City Housing Authority and submit it in timely manner to HUD; and

WHEREAS, the City Housing Authority retains its Board of Commissioners and may implement other affordable housing programs not assigned to the SCCHA under the 1996 Agreement, and accordingly the City Housing Authority has its own Chair and an Executive Director separate from the SCCHA; and

WHEREAS, the 1996 Agreement does not designate the Chair of the SCCHA Board of Commissioners as the “Chair Board of Commissioners of the City Housing Authority” or confer on the Executive Director of the SCCHA the title of the “Executive Director of the City Housing Authority;” and

WHEREAS, in connection with the City Housing Authority MTW Annual Plan submittal, the Chair of the Board of Commissioners for the SCCHA continues to execute

documents under the title of the Chair of the Board of Commissioners for the City Housing Authority and the Executive Director of SCCHA may also execute documents under the title of the Executive Director of the City Housing Authority; and

WHEREAS, there is no authorization for the use of these duplicative titles in the 1996 Agreement between the City Housing Authority and SCCHA; and

WHEREAS, the Board of Commissioners of the City Housing Authority desires to authorize (a) the City Housing Authority Board's Executive Director to submit a letter to SCCHA to support the Federal Fiscal Year 2025 MTW Annual Plan and (b) the Executive Director of the SCCHA Board and the Chair of the SCCHA Board of Commissioners to execute the documents required in connection with the Federal Fiscal Year 2025 MTW Annual Plan submittal in the name of the City Housing Authority, as set forth in the Memorandum from the City Housing Authority Executive Director from March 4, 2024.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE CITY OF SAN JOSE HOUSING AUTHORITY THAT:

(a) the City of San José Housing Authority Board's Executive Director is hereby authorized to submit a letter to the Santa Clara County Housing Authority ("SCCHA") Board to support the Federal Fiscal Year 2025 Moving to Work ("MTW") Annual Plan.
(b) the Executive Director of the SCCHA Board and the Chair of the SCCHA Board of Commissioners are hereby authorized to execute the documents required in connection with the Federal Fiscal Year 2025 MTW Annual Plan submittal in the name of the City of San José Housing Authority.

ADOPTED this _____ day of _____, 2024, by the following vote:

AYES:

NOES:

ABSENT:

DISQUALIFIED:

MATT MAHAN
Chair, Board of Commissioners

ATTEST:

TONI J. TABER, CMC
Secretary, Housing Authority
of the City of San José