



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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**AGENDA**

**DATE & TIME**

**REGULAR MEETING OF THE BOARD OF COMMISSIONERS**

**Wednesday, June 18, 2025 - 7:00 PM**

**LOCATION**

Independence Plaza, 703 Atlantic Avenue, Alameda - Ruth Rambeau Memorial Community Room

**PUBLIC PARTICIPATION** Public access to this meeting is available as follows:

To Attend In-Person -

Independence Plaza, 703 Atlantic Avenue, Alameda - Ruth Rambeau Memorial Community Room

Join Zoom Meeting

<https://us06web.zoom.us/j/82617583123?pwd=BM3TenEVxEayocip8V0NHIZ9Qi0nYb.1>

Meeting ID: 826 1758 3123

Passcode: 406791

Persons wishing to address the Board of Commissioners are asked to submit comments for the public speaking portion of the Agenda as follows:

- Send an email with your comment(s) to [jpolar@alamedahsg.org](mailto:jpolar@alamedahsg.org) and [vcooper@alamedahsg.org](mailto:vcooper@alamedahsg.org) prior to or during the Board of Commissioners meeting
- Call and leave a message at (510) 871-7435.

When addressing the Board, on agenda items or business introduced by Commissioners, members of the public may speak for a maximum of three minutes per agenda item when the subject is before the Board.

Persons in need of special assistance to participate in the meetings of the Housing Authority of the City of Alameda Board of Commissioners, please contact (510) 747-4325 (voice), TTY/TRS: 711, or [jpolar@alamedahsg.org](mailto:jpolar@alamedahsg.org). Notification 48 hours prior to the meeting will enable the Housing Authority of the City of Alameda Board of Commissioners to make reasonable arrangements to ensure accessibility or language assistance.

PLEDGE OF ALLEGIANCE



1. ROLL CALL
2. AB2449 COMPLIANCE "AB2449 Compliance: The Chair will confirm that there are 4 members in the same, properly noticed meeting room within the jurisdiction of the City of Alameda. Each board member who is accessing the meeting remotely must disclose verbally whether they are able to be remote under AB2449: (1) just cause (max. 2 per year), or (2) emergency circumstances." For Emergency Circumstances, the request must be approved by a majority vote of the Board of Commissioners for the emergency circumstances to be used as a justification to participate remotely. Remote Commissioners must provide a general description of the circumstances relating to need to appear remotely at the given meeting. Commissioner must also publicly disclose at the meeting, prior to any action, whether any other individuals 18 years or older are present in the room with the member at the remote location, and the general nature of the member's relationship with such individuals. Note: A Commissioner cannot participate in meetings of the Board of Commissioners solely by teleconference from a remote location for a period of more than 3 consecutive months or 20% of the regular meetings for AHA within a calendar year, or more than 2 meetings if the Board of Commissioners regularly meets fewer than 10 times per calendar year.
3. COMMISSIONER RECUSALS
4. Public Comment (Non-Agenda)
5. CONSENT CALENDER  
Consent Calendar items are considered routine and will be approved or accepted by one motion unless a request for removal for discussion or explanation is received from the Board of Commissioners or a member of the public.
  - 5.A. Accept the Monthly Overview Report for the Housing Programs Department. **Page 5**
  - 5.B. Accept the Monthly Overview Report for Property Operations. **Page 8**
  - 5.C. Accept the Monthly Update on Construction in Progress (CIP). **Page 13**
  - 5.D. Accept the Monthly Construction Report for The Estuary I. **Page 17**
  - 5.E. Accept the Monthly Construction Report for Linnet Corner. **Page 24**
  - 5.F. Accept the Monthly Report for North Housing Offsites. **Page 34**
  - 5.G. Accept the Monthly Development Report for The Poplar and Approve the Executive Director to Execute Contract Amendments Not to Exceed \$125,000 with Renew Urban Development. **Page 40**
  - 5.H. Accept the Quarterly LIHTC Portfolio Asset Management Fiscal Year-to-Date Financial Report through March 31, 2025. **Page 44**
  - 5.I. Authorize the Executive Director or Designee to sign an amendment with AppleOne, Inc. for temporary staffing services to increase the budget by \$150,000 in an amount not to exceed \$350,000 and extend services for one additional year. **Page 69**





- 5.J. Approve Agreement between Eagle and Everett Limited Partnership and ItsElectric. **Page 72**
- 5.K. Approve property budgets for the Housing Authority of the City of Alameda owned properties for July 1, 2025 - June 30, 2026. **Page 92**
- 5.L. Approve property budget for Independence Plaza for July 1, 2025 through June 30, 2026. **Page 102**
6. AGENDA
- 6.A. Conduct the Public Hearing for the Significant Amendment to the Annual Plan and Moving to Work Supplement for Fiscal Year 2025-2026. **Page 109**
- 6.B. Adopt the Agency's Significant Amendment to the Annual Plan and Moving to Work Supplement for Fiscal Year Starting July 1, 2025 and Authorize the Chair to Certify that the Board of Commissioners has Approved Submission of the Significant Amendment to the Annual Plan to HUD. **Page 172**
- 6.C. Accept the 2025 Customer Satisfaction Survey. **Page 177**
- 6.D. Approve Changes to the Administrative Plan. **Page 216**
- 6.E. Adopt a Resolution to Loan Island City Development, or its affiliate, up to \$500,000 for future funding applications for Estuary II, with the stipulation to seek other local funding; Authorize the Executive Director to Execute Commitments up to \$500,000 for Estuary II. **Page 261**
- 6.F. Establish a Nominating Ad Hoc Committee for the Appointment of the Chair and Vice Chair of the Board of Commissioners for the Period of July 1, 2025 - June 30, 2026. **Page 270**
7. ORAL COMMUNICATIONS, Non-Agenda (Public Comment)
8. WRITTEN COMMUNICATIONS
9. EXECUTIVE DIRECTOR'S COMMUNICATIONS
10. COMMISSIONER COMMUNICATIONS, (Communications from the Commissioners)
11. ADJOURNMENT

\* \* \* Note \* \* \*

- Documents related to this agenda are available on-line at:  
<https://www.alamedahsg.org/meetings/>
- Know Your RIGHTS Under The Ralph M. Brown Act: Government's duty is to serve the public, reaching its decisions in full view of the public. The Board of Commissioners exists to conduct the business of its constituents. Deliberations are conducted before the people and are open for the people's review. In order to assist the Housing Authority's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related



disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the Housing Authority accommodate these individuals.



To: Honorable Chair and Members of the Board of Commissioners

From: Ron Babiera, Assistant Director of Housing Programs

Date: June 18, 2025

Re: Accept the Monthly Overview Report for the Housing Programs Department.

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## **BACKGROUND**

This memo is a high-level overview of Housing Programs Department (HPD) activities for the prior month.

## **DISCUSSION**

### **Wait list**

The Housing Authority of the City of Alameda (AHA) staff have randomly selected families for placement on the wait lists that were opened in December 2024. Families that made the wait list were randomly ordered before preferences were applied. Once preferences were applied, families with the most preferences moved to the top of the wait list. Staff is currently verifying preferences for the Restore Rebuild and PBV wait list with the elderly preference through the Save My Spot functionality. Over 60,000 notifications were sent out to families about placement or non-placement on wait lists and the running of the Save My Spot functionality. Staff are striving to respond to e-mails and calls; however, there are not enough staff to respond to inquiries on wait list position which the AHA does not release.

### **Leasing**

AHA worked with the Oakland Housing Authority and the Housing Authority of the County of Alameda to re-allocate 36 vouchers under the Veteran Affairs Supportive Housing (VASH) program. The Department of Veteran Affairs (VA) and AHA have worked hand-in-hand and all vouchers are either issued or leased. The success rate of referred veterans was high. Four (4) vouchers remain to be leased up.

The lease-up process of 40 Project-Based Vouchers at The Estuary I and an additional 40 Project-Based Vouchers at Linnet Corner has started with the receipt of 40 referrals and 12 back-up referrals from the Coordinated Entry System (CES) for The Estuary I. As of the writing of this report, 42 applicants have been determined PBV eligible and



FPI is working independently to determine Tax Credit eligibility.

**FISCAL IMPACT**

For report only, no fiscal impact.

**CEQA**

N/A

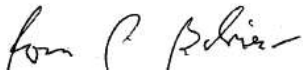
**RECOMMENDATION**

Accept the Monthly Overview of the Housing Programs Department.

**ATTACHMENTS**

1. April 2025 HPD BOC Dashboard

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Ron Babiera".

Ron Babiera, Assistant Director of Housing Programs

## Housing Programs Department Dashboard for April 2025

Total NON-ACC Vouchers Leased By Type		
Program	Vouchers Leased	Amount Awarded/Funded
Shelter Plus Care	18	18
Moderate Rehabilitation		
SRO	29	30

Total ACC Vouchers Leased By Type		
Voucher Program	Vouchers Leased	Amount Awarded
Housing Choice Vouchers (HCV)	999	Not Applicable
Project Based Vouchers (PBV)	326	Not Applicable
AHA-Owned HCV (FUP)	235	Not Applicable
	44	50
Veterans Affairs Supportive Housing (VASH)	68	76
Stability Vouchers (SV)	3	10
Total Vouchers Leased	1672	
Units on ACC	2059	
ACC Vouchers Not Leased	387	

Budget Authority (For April 2025 - Average Across 12 months)	
\$	3,642,856.17
Total HAP expended	
\$	3,967,533.38
HAP/Budget Authority	
	108.9%

Emergency Housing Vouchers*	
EHV (7760) in Alameda	35
EHV Port Outs	16
Total Leased	51
Total Awarded	57
*vouchers will decrease over time due to the sunset of the program and HUD's prohibition on issuing new EHVs	

Average Duration from voucher issuance to those leased up in April 2025 (days)	
	80.9
Average Tenant Rent to Owner	
\$	540.84
Average TTP	
\$	609.31
Average HH income	
\$	25,128.03
Percentage of Inspections Passed First-Time (04/2025)	
	3%
Inspections Completed (04/2025)	
	80

Average of HAP per Bedroom size		
Bedroom Size	Average HAP	Count of Households
0	\$ 688.02	479
1	\$ 1,806.32	594
2	\$ 2,147.94	532
3	\$ 2,780.76	187
4	\$ 3,182.33	30
5	\$ 5,128.00	1

To: Honorable Chair and Members of the Board of Commissioners

From: Nancy Gerardin, Director of Property Operations

Date: June 18, 2025

Re: Accept the Monthly Overview Report for Property Operations.

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**BACKGROUND**

This memo provides a high-level overview of the Property Operations Department's activities for the previous month.

**DISCUSSION**

The attached table (Attachment 1) summarizes property performance for all sites including Housing Authority of the City of Alameda (AHA) and affiliate-owned sites for the month of May for all properties FPI Management (FPI) manages. We continue to work closely with FPI to improve overall property operations.

**VACANCY**

The attached table (Attachment 1) reflects the end-of-month occupancy and leased rate per site. Staff are working with FPI to improve the timeliness of the leasing efforts and review vacancy loss weekly with FPI to reduce vacancies and improve the unit turn process. The average days to make ready for the month of May was 7 which is an improvement over the month of April that reflected 11 days to make ready status.

In Q3 of 2024, AHA implemented a pre-screening process to assist with the leasing efforts of PBV units at Anne B. Diamant, Parrot Village, and Littlejohn Commons. The intent is to minimize the amount of downtime during the outreach and review of the initial resident selection criteria with staff performing the outreach, initial review of occupancy and income qualifications, and mailing of disposition letters to families and the Housing Programs Department. Once applications have been identified as pre-qualified, the files will be sent to FPI for final criteria review to include background and landlord reference confirmation. Thus far, this process has proven to be beneficial, and we included the pre-screening process for Independence Plaza and Parrot Village 4 bedroom units effective in September, and all remaining PBV units within the portfolio were added to this process effective November 2024. This practice will be used for the lease-up efforts for Estuary I and Linnet Corner. As part of the resident screening, FPI is





also requesting a copy of their rent ledger from new applicants to ensure that they pass the landlord reference portion. This is not required from those who are homeless or living with family.

Vacancies that do not have a waitlist are posted on the AHA website and applications are available through the Resident Managers, as well as [affordablehousing.com](https://affordablehousing.com), GoSection 8 (the Section 8 online search engine) and on Craigslist.

Pre-leasing efforts have begun for both Estuary I and Linnet Corner. AHA staff work side by side with FPI and CES navigators to schedule appointments for applicants, assist with the application process, and ensure applications are processed through to a final decision as quickly as possible. As of the end of May, 57 clients have been referred for Estuary I with ten files approved by FPI. In the month of May, AHA conducted the lottery from the waitlist identifying possible applicants that meet the live/work preference for the City of Alameda for the 23 non-PBV units at Linnet Corner. In-person and online meetings have been held for applicants that have been identified as meeting the preference criteria in an effort to guide them through the application process, qualifying criteria, and provide information regarding the community and apartment homes. One-on-one interviews began the last week of May and FPI began processing applications.

## RENT COLLECTIONS

The attached table (Attachment 1) provides the rent collection rate versus budget for all AHA-owned and affiliate-owned sites managed by FPI. Overall portfolio rent collection rate for the month of May was 92%.

Properties with collection rates in excess of 95% are due to higher market rents achieved versus the budget coupled with increased subsidy payments. The lower collection rates for May are primarily due to the units pending legal action, past due balances for residents (some properties are still affected by non-payment of rent during the COVID-19 pandemic), long-standing vacancy at Parrot Gardens (AHA will recoup the vacancy loss from FPI per the terms of the PMA once occupied), and the pending reconciliation of both HAP and resident payments due to the conversion at Independence Plaza to the Restore Rebuild program.

Like many owners, especially non-profit owners, there remains a fairly large payment issue stemming from the COVID era. The total delinquency (unpaid rent) for the portfolio for current residents is \$391,974. Of this, the total delinquency for residents in legal (i.e. subject to a 30-day notice of termination) is \$213,636.

All residents with a past due balance are referred to LifeSTEPS for assistance. Property Management and LifeSTEPS continue to engage residents and encourage them to enter into a repayment agreement. Residents who owe over \$100 are issued a 30-day notice to pay or quit and are referred to legal counsel for review of their cases and, where necessary, the 30-day notice to pay or quit has been filed with the court.

LifeSTEPS, FPI, and the Ombudsman are working with these families to enter into a "stay and pay" stipulated agreement, although a very small number have not complied and will be evicted if they do not leave before the lock out.

Residents who only owe back rent from prior to December 2022 cannot be issued a 30-day notice, so some fairly significant balances will remain on the ledger until the resident moves out. A few other legal cases are ongoing for nuisance behavior.

Rent collections, pending legal/eviction matters, and overall account receivable collection efforts are reviewed in detail weekly by AHA with FPI.

## RENT INCREASES

Rent increases have been and will continue to be issued at all sites in the coming months in accordance with the new payment standards implemented in November 2024. This will result in increases in the total contract rent, but these rent increases are raised to the level of the new Payment Standards and generally will not impact subsidized residents' rent portion, as long as they are not over-housed. Rent increase notices are served at least 60 days in advance of the effective date to provide ample notice to residents.

## SOCIAL SERVICES

LifeSTEPS has been providing aid to tenants and households and continues to link them to financial and social service agencies, as needed. LifeSTEPS is also actively engaged in resident functions, participating in the Town Hall meetings conducted in the month of October along with the FPI and AHA management teams. In the month of November, FPI and LifeSTEPS collaborated to engage with residents to introduce and encourage online and automated payment options through the resident portal such as WIPS (walk-in payment system) and Flex. Flex is a new payment option that allows residents to pay rent on a bi-monthly schedule. However, landlords receive rent payments as they are due per the lease terms.

The LifeSTEPS team and FPI continue to work with residents to participate in the online options available and enrollment in Rent Café'/the resident portal.

## MAINTENANCE

Unit by unit inspections were conducted by FPI for each community in June 2024 and annual HQS inspections were completed in the month of December. These inspections allow management and ownership to proactively address any repairs needed, evaluate overall property condition, and assist residents that may need social services to address personal needs. The annual inspections for 2025 have been scheduled and will begin in July.

AHA continues to conduct bi-weekly site inspections to assess all common areas,

vacant units, and potential life safety matters.

## **HIRING**

The department is in the process of hiring a Property Management Supervisor.

## **FISCAL IMPACT**

Not applicable.

## **CEQA**

Not applicable.

## **RECOMMENDATION**

Accept the Monthly Overview Report for Property Operations.

## **ATTACHMENTS**

1. June Board Memo Attachment 1

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'NG' or similar, written in a cursive style.

Nancy Gerardin, Director of Property Operations

ATTACHMENT 1

May 25

Property Name	Owned by	Managed by	Total units	Senior or Family	Manager units	Gross Potential Rent (Budgeted)	Resident Rent Collected	Subsidy collected	Total Rent Collected (Actual)	% collected	Current Total Unpaid Charges - May Month End	0-30 Day AR	31-60 Day AR	61-90 Day AR	90 + Day AR	Eviction Status AR - May Month End
China Clipper	AHHC	FPI	26	Family	0	\$53,626.00	\$11,028	\$39,574	\$50,602	94.4%	\$3,994	\$53	\$361	\$50	\$3,530	\$15,738
Esperanza	AHHC	FPI	120	Family	1	\$392,959.00	\$96,122	\$288,023	\$384,145	97.8%	\$56,677	-\$645	\$2,130	\$225	\$54,967	\$10,857
Littlejohn Commons	ICD	FPI	31	Senior	1	\$74,345.00	\$11,289	\$57,828	\$69,117	93.0%	\$1,065	\$699	\$140	\$50	\$176	\$0
Parrot Garden	AHA	FPI	8	Family	1	\$25,384.00	\$6,984	\$11,966	\$18,950	74.7%	\$0	\$0	\$0	\$0	\$0	\$0
Parrot Village	AHHC	FPI	50	Family	1	\$183,063.00	\$39,037	\$123,235	\$162,272	88.6%	\$6,947	\$655	\$79	\$220	\$5,993	\$15,450
Everett Commons	ICD	FPI	20	Family	1	\$59,529.00	\$11,898	\$46,198	\$58,096	97.6%	\$2,868	\$291	\$424	\$1,312	\$841	\$0
Scattered Sites	AHA	FPI	25	Family	0	\$53,482.00	\$3,518	\$44,191	\$47,709	89.2%	\$4,778	\$2,611	\$131	\$100	\$1,936	\$0
Scattered Sites	AHHC	FPI	27	Family	0	\$64,222.00	\$21,283	\$39,095	\$60,378	94.0%	\$41,419	\$4,017	\$78	\$50	\$37,274	\$0
Rosefield Village	ICD	FPI	92	Family	1	\$188,980.00	\$91,835	\$83,907	\$175,742	93.0%	\$52,872	\$2,121	\$2,384	-\$75	\$48,442	\$103,793
Eagle Village	AHHC	FPI	36	Family	1	\$94,381.00	\$20,143	\$72,313	\$92,456	98.0%	-\$2,222	\$0	\$0	\$0	-\$2,222	\$62,009
Independence Plaza	AHA	FPI	186	Senior	2	\$460,813.00	\$105,893	\$77,704	\$383,597	83.2%	\$6,446	-\$68	\$159	\$0	\$6,355	\$5,789
Anne B Diamant	AHHC	FPI	65	Senior	1	\$138,986.00	\$36,594	\$107,172	\$143,766	103.4%	\$3,495	\$230	\$0	\$0	\$3,265	\$0
<b>TOTAL</b>			<b>686</b>		<b>10</b>	<b>\$1,789,770.00</b>	<b>\$455,624.00</b>	<b>\$1,191,206.00</b>	<b>\$1,646,830.00</b>	<b>92.0%</b>	<b>\$178,339</b>	<b>\$9,964</b>	<b>\$5,886</b>	<b>\$1,932</b>	<b>\$160,557</b>	<b>\$213,636</b>

Month Ending May 2025

Property Name	Owned by	Total Vacant 05/31/2025	Occupancy	Leased %
China Clipper	AHHC	4	84.60%	84.61%
Esperanza	AHHC	10	91.86%	95.12%
Littlejohn Commons	ICD	0	100.00%	100.00%
Parrot Garden	AHA	1	87.50%	87.50%
Parrot Village	AHHC	5	90.00%	92.00%
Everett Commons	ICD	2	90.00%	95.00%
Scattered Sites	AHA	2	92.30%	92.30%
Scattered Sites	AHHC	0	100.00%	100.00%
Rosefield Village	ICD	5	94.56%	97.83%
Eagle Village	AHHC	1	97.22%	97.22%
Independence Plaza	AHHC	14	92.47%	92.47%
Anne B Diamant	AHHC	1	98.46%	100.00%
<b>TOTAL</b>		<b>45</b>	<b>93.6%</b>	<b>94.92%</b>



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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Joseph Nagel, Senior Construction Project Manager

Date: June 18, 2025

Re: Accept the Monthly Update on Construction in Progress (CIP).

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### **BACKGROUND**

The Housing Authority of the City of Alameda (AHA) and its affiliate, the Alameda Affordable Housing Corporation (AAHC), own and operate several multifamily properties throughout the City of Alameda. Periodically, work is scheduled to maintain and upgrade existing buildings, or to improve properties that are anticipated to be redeveloped in the future. In 2022, AHA and AAHC obtained Physical Needs Assessments (PNA) on all properties over 5 years old. These assessments delineated capital needs over a 15-year period, but also highlighted any health and safety needs and items for short-term attention. AHA and AAHC have completed or begun all health and safety items, and plan to address short-term needs through the annual budgeting process for every property. Staff prioritize work that is health and safety-related, lender-required, or provides risk mitigation. Priority tasks are divided between onsite FPI staff and contracting, and larger projects where there may be additional planning and permit submissions, which are undertaken by AHA staff.

There are multiple sizable projects being planned or underway at this time. This report serves to provide updates on these projects.

### **DISCUSSION**

The following construction projects are in progress as of this Board Meeting:

1. HazMat Remediation and Demolition of Existing Structures at The Poplar, 2615 Eagle Ave. (Formerly AUSD Maintenance)

Site: The Poplar

Total cost: In May 2025, the Board approved a not-to-exceed budget of \$500,000.

Source of funds: Poplar pre-development sources

Purpose: Remediate, demolish and dispose of the existing physical improvements at 2615 Eagle Ave., for the purposes of future development.

Timeline: To be determined

Status: The demolition permit is currently under review by the City of Alameda Planning



Department and on February 19, 2025, AHA issued a Request For Proposal (RFP) for remediation, demolition, and monitoring services. A mandatory bid walk for interested vendors was conducted on March 4, 2025, and nine (9) potential contractors attended. Only one (1) proposal for services was received in response to this RFP. The RFP was re-issued with a simplified, streamlined scope and bid walk attendance was revised to be not mandatory. AHA has requested proposals with a single mobilization for remediation and demolition. The latest RFP was issued on April 3, 2025. A bid walk was conducted on April 21, 2025, and 3 new proposals were received by the submission deadline on May 5, 2025. Review of the proposals and references received are currently under review. Interviews of the potential consultants/contractors will be scheduled in June 2025.

## 2. China Clipper Balcony Repairs

Site: China Clipper

Estimated total cost: \$110,000

Source of funds: Property Operating Budget

Purpose: Repair balconies in compliance with Senate Bill 721 recommended repairs.

Timeline: This scope of work is expected to take 9 months to complete.

Status: Barry and Wynn Architects have been chosen to design the two (2) replacement balconies and provide the permit documents at a cost of \$29,876.67. A contract was signed on April 9, 2025, and a design walk was performed on May 1, 2025, with the architect and engineer. The architect is now working on the architectural, waterproofing and structural design. The preliminary drawings are expected by June 27, 2025.

## 3. Lincoln House Balcony Repairs

Site: Lincoln House

Estimated total cost: \$65,000

Source of funds: Property Operating Budget

Purpose: Repair balconies in compliance with Senate Bill 721 recommended repairs.

Timeline: This scope of work is expected to take 9 months to complete.

Status: Barry and Wynn Architects have been chosen to design the two (2) replacement balconies and provide the permit documents at a cost of \$14,938.33. A contract was signed on April 9, 2025, and a design walk was performed on May 1, 2025, with the architect and engineer. The architect is now working on the architectural, waterproofing and structural design. The preliminary drawings are expected by June 27, 2025.

## 4. Independence Plaza Community Room Kitchen ADA Accessibility Renovation

Site: Independence Plaza

Estimated total cost: \$58,121.92

Source of funds: Property Operating Budget or Reserves

Purpose: HUD required accessibility renovations.

Timeline: Completed

Status: The permit has been received. New Generation Builders, Inc. mobilized and began renovations on March 31, 2025. This work has been completed, and final inspection passed by the City of Alameda Building Department.



5. Independence Plaza Lobby and Restrooms ADA Accessibility Renovations.

Site: Independence Plaza

Estimated total cost: To be determined

Source of funds: Property Operating Budget or Reserves

Purpose: HUD required accessibility renovations.

Timeline: To be determined

Status: TWM Architects have been chosen to design two (2) restrooms and a lobby and provide the permit documents at a cost of \$33,000. A contract was signed on April 16, 2025, and a design walk was performed on April 29, 2025, with the architect. The architect is now working on the architectural, waterproofing and structural design. The preliminary drawings are expected by July 7, 2025.

6. Parrot Garden/ Parrot Village Office ADA Accessibility Renovation

Site: Parrot Garden/ Parrot Village

Estimated total cost: To be determined

Source of funds: Property Operating Budget

Purpose: Code Compliant Required accessibility renovations.

Timeline: Work is expected to take 3 to 4 weeks.

Status: Barry and Wynn Architects have been chosen to design the office and parking accessibility renovation and provide the permit documents at a cost of \$44,000. A contract was signed on April 16, 2025, and a design walk was performed on May 1, 2025, with the architect. The surveyor was on site to determine and document the existing grade. Once that report is provided, the architect will complete the preliminary drawings, expected by July 14, 2025.

7. Portfolio Seismic Assessment and Remediation Reports

Sites: AHA, AAHC Portfolio.

Total cost: To be determined

Source of funds: AHA General Fund

Purpose: Review and analyze the potential seismic vulnerability to earthquake damage to structures within the existing portfolio and outline necessary repairs or modifications needed to improve their structural integrity and minimize potential damage during an earthquake.

Timeline: To be determined

Status: An RFQ for Engineering and Consulting Services was published on April 7, 2025. Three (3) proposals were received by the May 16, 2025 deadline. The proposals and references are being reviewed by AHA staff and interviews will be scheduled for June 2025.

8. ADA Compliant Signage

Site: Independence Plaza, Lincoln House, Sherman House, and Stanford House

Estimated total cost: \$45,820

Source of funds: Property Operating Budgets

Purpose: ADA Required Accessibility Renovations.

Timeline: To be determined

Status: The signage is in design and expected to be fabricated by June 30, 2025.

9. North Housing Soil Off-haul

Site: North Housing

Estimated Cost: Not to Exceed \$3,000,000

Source of Funds: AHA

Purpose: Off-haul and dispose of excess soil created by civil work at North Housing.

Timeline: The soil removal and off-haul to the approved Vasco Road facility in Alameda County began with 111 truckloads on May 6, 2025, and was expected to take 2 to 3 weeks to complete.

Status: Soil off haul was completed on May 22, 2025.

**FISCAL IMPACT**

Funding for repairs and maintenance on existing properties owned by either AHA or the AAHC is from either property reserves or the 2025 Reserve Policy Preservation Budget, as adopted by the AHA Board of Commissioners. Funding for the Poplar is being supported by redevelopment funds from the City of Alameda.

**CEQA**

None.

**RECOMMENDATION**

Accept the Monthly Update on Construction in Progress (CIP).

**ATTACHMENTS**

None

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Joseph Nagel".

Joseph Nagel, Senior Construction Project Manager



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Jocelyn Layte, Acting Associate Project Manager

Date: June 18, 2025

Re: Accept the Monthly Construction Report for The Estuary I.

---

### **BACKGROUND**

The Housing Development Department provides monthly reports on projects under construction where either the Housing Authority of the City of Alameda (AHA) or Island City Development (ICD) is acting as developer and provides performance guarantees.

The Estuary I project is located at 500 Mosley Avenue. ICD is the developer. The project scope includes 45 new construction permanent supportive housing units for homeless or formerly homeless individuals or households, including one manager's unit. Amenities include property management offices, social service coordination offices, a community room, a mail room, central laundry, central courtyard, and secure bike parking. J.H. Fitzmaurice, Inc. (JHF) initiated construction on January 30, 2024, and is scheduled to achieve completion on or before August 8, 2025.

Please see previous monthly Board Reports for project details prior to this month's update

### **DISCUSSION**

#### **Construction:**

The overall project completion and billing percentage, through April 30, 2025, is approximately 96%. All units have been completed and are completing final back punch and sign offs. The city has passed units on the 2-4th floor. The AHA team and the General Contractor, JH Fitzmaurice (JHF), completed 1st-4th floor corridor punch walks that identified common fixes in preparation for sign offs.

The lobby and common areas have lighting and ceiling finishes going in. Office spaces have complete finishes and doors with hardware installed. Paver and cement work is complete, and land scaping continues to move ahead. Closed Circuit Television (CCTV) cameras and the live guard, patrolling the site after hours and on weekends, provide security at the site as JH Fitzmaurice (JHF) continues to make good construction progress. The balancing and testing of mechanical systems is under way and final



inspections are getting scheduled for June. Currently, there are 27 rain days which were used due to the rain's impact on site work and offsite items. This means an additional 17 days were taken from the overall schedule on top of the original contract budgeted 10 rain delay days. At this time, the GC still anticipates early completion despite the rain delays, so long as electrical, landscape, and elevator trades move forward on time. Staff are tracking this and continue to monitor delays, weather, and project schedule to consider if acceleration would be needed to finish on time. There is an allowance reserved for site work acceleration if needed. Temporary certificate of occupancy (TCO) is dependent on the completion of specific offsite scopes which staff are tracking.

May's active construction activities include: installation of stair well flooring, remaining door hardware, electrical lighting fixtures, punch walk corrections on interior units and corridors, appliance installation, continuing landscape planting and installation of irrigation, exterior fencing at the courtyard and pathway work on the south and north elevations, pet relief area fencing installation, and topsoil delivery. The AHA team will have final sign offs of units and corridors in early June. Interior and exterior work this month is moving forward according to schedule.

A change order was approved over the past month for \$100,028.45, increasing the total approved change orders to \$597,583. An Owner's hard cost contingency and a General Contractor's contingency (already budgeted within the GC contract) are available for upgrades, master-plan cost overruns, as well as unexpected costs detailed below. Owner contingency funds are held separately from the contract. Executed change orders have utilized 50% of the Owner's hard cost contingency and a General Contractor's contingency combined.

The total projected use of owner contingency (including General Contractor's Contingency and soft cost savings) is 64%. Only the Executive Director can approve additional costs to the contract and staff closely review all prospective change orders at the site. All supplies needed to finish the project have been bought out so there is not expected to be a significant impact from the recently announced tariffs.

#### Supportive Services

The Housing Authority and Island City Development has acknowledged the request of Building Futures to withdraw from the role of providing supportive services at Estuary I. All contracts and supportive services materials are being transferred to LifeSTEPS, Inc. The other service provider, Alameda Point Collaborative, has also acknowledged this transition. The services and construction funders have all been contacted about this transition. LifeSTEPS, Inc. is a qualified service provider that was identified in the most recent procurement process that AHA and ICD held for supportive services at tax credit properties. They currently serve permanent supportive housing developments with a breadth of services, including mental health services throughout the State of California. They are a current County of Alameda approved contractor for intensive case management services, such as are expected to be provided in-kind at Estuary I.

#### Operation and Lease Up Activities

Staff are working with cross-agency departments and external partners to prepare the project for leasing and operations in 2025. Weekly all-hands meetings and task coordination have begun and will continue throughout the projects lease up and transition to property operations. This month, the team walked through the office spaces identifying any needs for lease up and operations of the building and focused on finalizing contracts for the first year of operations.

All units will be filled from referrals – there are no units open to the general public at Estuary I and 40 of the 44 units will also receive Project-based vouchers (PBV). FPI Management staff are on board working on lease-up reviews as of 4/1/2025. As of May 29th, 2025, AHA has approved forty-one applicants who were referred from the Alameda County Coordinated Entry System (CES). Property Management is working to approve referrals on their end with five approved and twenty-one pending approval for the LIHTC compliance requirements. Focus continues to be on finalizing the Memorandum of Understanding with the County of Alameda for referrals from the CES, finalizing lease-up and operating budgets, and executing contracts with property management (FPI) and services (Building Futures). All units are leased fully furnished. Furnishings for units have been ordered, and model units will be set up for viewing during pre-leasing activities and move-ins.

### **FISCAL IMPACT**

AHA and ICD have completion and lease up guarantees on this development. The construction is currently trending a few weeks early and is on budget. Operations and lease up planning activities are meeting project milestones. See attachment for the monthly budget update.

### **CEQA**

Not Applicable.

### **RECOMMENDATION**

Accept the Monthly Construction Report for The Estuary I.

### **ATTACHMENTS**

1. Att\_1 Estuary I Photo updates from May 2025
2. Att\_2 Est I Monthly Budget Report

Respectfully submitted,



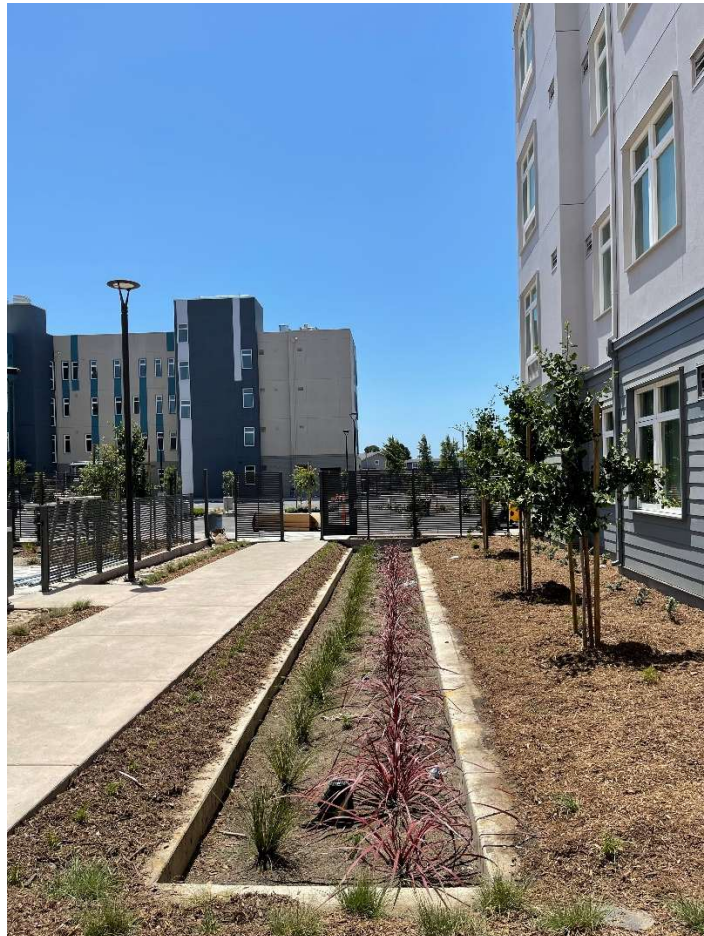
With support from Neil Saxby, Renew Urban, Consultant  
Jocelyn Layte, Acting Associate Project Manager



# The Estuary I Progress Photos May 2025



Aerial photo looking south showing the northern and western elevation exterior walls.

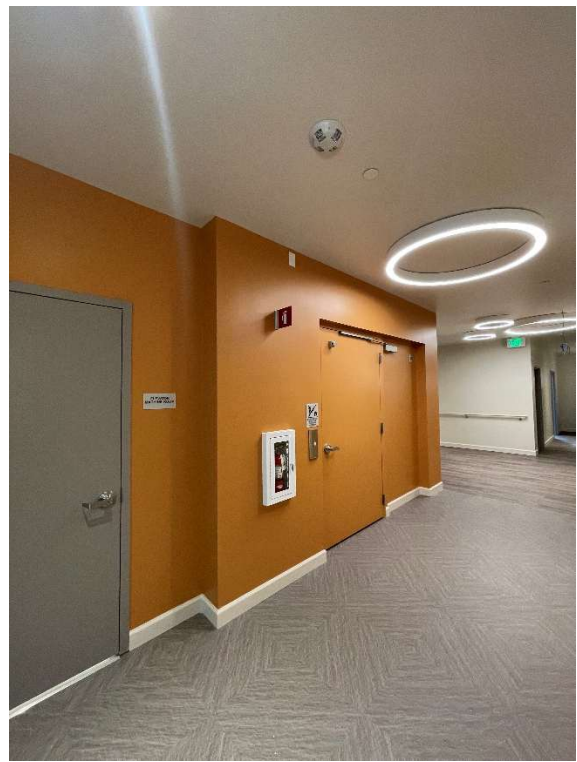


Southern side of Estuary I Landscaping and bioretention area complete





Mail boxes have been installed in the Lobby



Corridor Punch walks started in May



Landscaping at the Courtyard is complete. Astro turf will be completed early June.

<b>Total Development Costs to Date</b>		
	\$ Budget	\$ Disbursed
Land & Holding Costs	\$ 2,444,509.90	\$ 2,444,510.00
Hard Costs	\$ 28,987,749.14	\$ 23,349,984.14
Soft Costs	\$ 11,516,406.96	\$ 4,310,257.61
Total	\$ 42,948,666.00	\$ 30,104,751.75

<b>General Contract Status</b>	
Total Contract Value	\$ 24,898,007.00
Change Orders	\$ 597,583.16
Revised Contract Value	\$ 25,495,590.16
Value of Work Completed to Date	\$ 24,459,855.60
Retention Withheld	\$ 2,394,615.93
Amount Paid to Date	\$ 22,065,239.67
Balance to Finish less retention	\$ 1,035,734.56
% Construction Complete	96%

<b>Contingency Utilization</b>		
	Hard Cost	Soft Costs
Total Contingency Approved	\$ 1,394,525.00	\$ 250,000.00
Approved Change Orders to Date	\$ 597,583.16	\$ 125,000.00
Projected Use of Contingency	\$ 298,713.00	
Remaining Balance of Contingency	\$ 498,228.84	\$ 375,000.00
% of Contingency Projected Use	64%	

% Disbursed	\$ Balance
100%	\$ (0)
81%	\$ 5,637,765.00
37%	\$ 7,206,149.35
70%	\$ 12,843,914.25



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**TTY/TRS:** 711

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To: Honorable Chair and Members of the Board of Commissioners

From: Paris Howze, Project Manager

Date: June 18, 2025

Re: Accept the Monthly Construction Report for Linnet Corner.

---

### **BACKGROUND**

The Housing Development Department provides monthly reports on projects under construction where either the Housing Authority of the City of Alameda (AHA) or Island City Development (ICD) is acting as developer and provides performance guarantees.

Linnet Corner is located at 2000 Lakehurst Circle, Alameda, CA 94501. The project is the new construction of a single, four (4) story residential building, with 64 units. There will be 40 studio units and 23 one-bedroom units targeting seniors aged 62 and over. There will also be one two-bedroom unit dedicated as a manager's unit. Affordability levels will range between 30% and 40% of the Area Median Income (AMI). The project will also have 25% or 16 units serving formerly homeless or currently homeless senior veterans. Amenities will include a community room, onsite property management and service provider offices, shared unassigned parking, a laundry room, a resident garden, and a roof terrace.

Staff delivered a notice to proceed on March 6, 2024, and J.H. Fitzmaurice, Inc. (JHF), commenced construction activities on March 14, 2024. The project is expected to achieve completion ahead of schedule in September 2025.

Please see previous Board of Commissioner reports for project details before this month's update.

### **DISCUSSION**

#### *Construction:*

The overall project completion and billing percentage, through May 31, 2025, is approximately 91%. This month's construction activities included installation of flooring within units and corridors on the third and second floors, commencement of appliance delivery with installation ongoing through the month of June. Continued landscaping activities included installation of wood pavers on the third-floor roof terrace, tree planting in frontage of the exterior patio areas and parking lot, and fence installation in



theresident garden area. The team also began painting and striping within the parking lot. Additionally, JHF and their team of subcontractors completed soil off-haul activities ahead of schedule.

The project currently has 20 rain delays, attributable to the rain's impact on site work and offsite items. The interiors are on or ahead of schedule. At this time, the GC still anticipates early completion despite the rain delays so long as electrical and elevator trades move forward on time. Staff are reserving an allowance for site work acceleration if needed.

Change orders over the past month totaled \$126,455.63 increasing the total approved change orders to \$614,922. Owner contingency funds are held separately from the contract. Executed change orders have utilized 35% of the available hard cost contingency, and the anticipated overall use is estimated at 50%. Only the Executive Director can approve additional costs to the contract, within the planned contingency amounts, and staff closely review all prospective change orders at the site. Staff are also tracking soft cost savings and the use of contingencies, which can also be applied to hard cost uses later in the project's cycle.

Linnet Corner and Estuary I's project partners including the projects' lender and investor, property management and service providers teams as well as the general contractor joined AHA staff on a tour of North Housing to view progress of the properties just a year after the groundbreaking ceremony in April 2024.

*Additional funding update:*

The Home Depot Foundation (THDF) awarded the project a \$200,000 grant to be used towards construction costs which will help offset overall project costs. Staff are working with our partners at Bank of America and Enterprise to memorialize the \$200,000 grant in respective loan documents. The City of Alameda is also proposing to invest a \$250,000 award from their Prohousing Incentive Fee funds to create a reserve for supportive services to be used by the end of 2026.

*Deferred Developer Fee:*

Staff was previously tracking a gap due to Linnet Corner's portion of estimated soil off-haul costs in addition to the anticipated savings in interest, permit and impact fees, as well as savings in both soft and hard cost contingencies. The worst case scenario projected additional deferred fees and a possible additional infusion of funds as equity from AHA in 2026.

The soil offhaul activities have been completed at the site, which reduces uncertainty and the costs have come in substantially lower than the maximum authority provided by the Board. In addition, after ongoing conversations with our internal Finance team and Novogradac, staff is confident that most soil-off haul costs will be basis eligible and preserve equity, thus reducing the funding gap. The current gap is expected to be covered by deferred fees only. Staff continues to watch as the project nears construction completion for variables that could impact the gap, such as lease-up timing



and income from operations. Staff continues to work diligently to reduce any need for extra deferred fees but is much more positive about the final position of this project.

#### Operation and Lease-Up Activities:

Starting in January 2025, staff across different agency departments and external partners worked to prepare Linnet Corner for lease-up commencement in April 2025. The team has initiated a weekly all-hands meeting to coordinate the deliverables required for a smooth lease-up and transition to property management upon commencement of operations. Linnet Corner's lease-up will utilize a combination of three different sources to lease its 63 units (excluding the manager's unit):

1. Coordinated Entry System (CES) units: 16 one-bedroom and studio units are reserved for un-housed, disabled senior veterans referred by Alameda County Health Services Agency's (HCSA) Coordinated Entry System (CES) or through other social services agencies. These units all have Project-Based Vouchers (PBVs). Referrals from CES are expected soon. An interest list has also been stated in case CES is unable to provide 16 referrals.
2. PBV units: 24 one-bedroom and studio units will be filled through AHA's existing Project-Based Voucher (PBV) waiting list; lease-up will begin in May 2025 for these units, and
3. Lottery Units: 23 studio units will be filled through a public lottery for the units not tied to PBV subsidy or CES. In April 2025, staff ran a two-week application period and received over 1,700 applications. At the beginning of May 2025, staff conducted a public lottery and throughout the month will continue to work with property management to identify eligible applicants. Additional project information on Linnet Corner can be found on Linnet Corner's new leasing website at [www.linnetcorner.com](http://www.linnetcorner.com).

Newly-hired property management and service provider staff continue to partner with AHA's Housing Programs Departments staff to identify and review applicants both from AHA's existing PBV list and continue to process eligible live work applicants for the lottery. Eligibility and compliance verification will be ongoing through the start of move-ins with all eligible residents anticipated to be identified upon receipt of a temporary certificate of occupancy (TCO) at the end of September 2025.

Staff also continue to work closely with agency departments on the finalization of first-year operating budgets, lease-up agreements, property operations contracts, and supportive services contracts.

#### **FISCAL IMPACT**

The Home Depot grant will provide additional funds to the Linnet project and potentially allow it to defer less developer fee. The grant to ICD will be lent to the Linnet Corner partnership.

AHA and ICD have completion and lease-up guarantees on this development. To date,



the construction is on time, and may deliver one month early, weather permitting. At this time, any cost overruns are covered by contingencies, savings, and deferred developer fees. Linnet Corner is a 4% tax-credit project which is reliant on basis-eligible costs for part of its financing. Changes during construction (including the soil offhaul cost, basis-eligible cost savings, and interest savings due to lower interest rates) will result in some equity loss. This loss will be covered by cost savings, and also by an additional deferred developer fees. The project has a \$3,000,000 developer fee in total of which \$1,295,000 was deferred at closing. The maximum additional deferred fee is \$1,705,000. Staff will continue to review and come back to the Board if additional ICD or AHA funding is needed.

**CEQA**

Not applicable.

**RECOMMENDATION**

Accept the Monthly Construction Report for Linnet Corner

**ATTACHMENTS**

1. 25\_06\_Linnet Corner - Budget Tracking
2. 25\_06\_Linnet Corner - Progress Photos

Respectfully submitted,



Paris Howze, Project Manager

**Linnet Corner**  
**Monthly Update - as of May 31, 2025**

<b>Total Development Costs to Date</b>				
	\$ Budget	\$ Disbursed	% Disbursed	\$ Balance
Land & Holding Costs	\$640,864	\$526,338	82%	\$114,526
Hard Costs	\$36,513,061	\$28,551,102	78%	\$7,961,959
Soft Costs	\$16,118,331	\$5,180,342	32%	\$10,937,989
Total	\$53,272,256	\$34,257,782	64%	\$19,014,474

<b>General Contract Status</b>	
Total Contract Value	\$29,561,507
Change Orders	\$597,901
Revised Contract Value	\$30,159,408
Value of Work Completed to Date	\$27,489,052
Retention Withheld	\$2,689,074
Amount Paid to Date	\$24,799,979
Balance to Finish	\$5,359,429
% Construction Complete	91%

<b>Contingency Utilization</b>		
	Hard Cost	Soft Costs
Total Contingency Approved	\$1,738,717	\$450,000
Approved Change Orders to Date	\$614,922	(\$36,863)
Remaining Balance of Contingency	\$1,123,795	\$486,863
% of Contingency Used	35%	108%
Anticipated Master Plan Costs	\$0	
Projected Use of Contingency	\$199,686	
Remaining Balance of Contingency	\$924,109	
% of Contingency Projected	47%	

Linnet Corner  
Progress Photos  
(May 31, 2025)



*Figure 1: Bird's-eye view of Linnet Corner & Estuary I*



*Figure 2: Bird's-eye view from Lakehurst Circle*



Linnet Corner  
Progress Photos  
(May 31, 2025)



*Figure 3: View from Mosley and Mabuhay Avenue*



*Figure 4: View from corner of Lakehurst Circle & Mabuhay Street*

Linnet Corner  
Progress Photos  
(May 31, 2025)



*Figure 5: Corridor flooring installation*



*Figure 6: Commencement of appliance delivery and installation on 4<sup>th</sup> floor*



Linnet Corner  
Progress Photos  
(May 31, 2025)



*Figure 7: Tree planting in landscape areas*



*Figure 8: Painting and striping within parking lot areas*

Linnet Corner  
Progress Photos  
(May 31, 2025)



*Figure 9: Installation of wood pedestals on 3<sup>rd</sup> floor roof terrace*



*Figure 10: Site Tour Photo with North Housing Partners including representatives from AHA, Enterprise, Bank of America, FPI Property Management, LifeSTEPS, Elevation Consulting, and J.H. Fitzmaurice*





Housing Authority  
of the  
City of Alameda

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To: Honorable Chair and Members of the Board of Commissioners

From: Jocelyn Layte, Acting Associate Project Manager

Date: June 18, 2025

Re: Accept the Monthly Report for North Housing Offsites.

---

### **BACKGROUND**

The Housing Development Department provides monthly reports on projects under construction. The Housing Authority of the City of Alameda (AHA) is leading the North Housing Master-Plan work to prepare the sites and provide infrastructure for Linnet Corner and Estuary I. This report provides updates on the North Housing Block A offsite work.

### **DISCUSSION**

Site: North Housing Block A Offsite Improvements, 501 Mosley Avenue, Alameda, CA 94501

Total cost: \$6,386,830.16. This is an increase of \$2,156,456.18 for Change Order 4 (dated April 29, 2025) which reflects the soil offhaul scope, and Change Order 5 for \$214,627.20 (dated May 22, 2025).

Source of funds: Budgeted within the North Housing Block A projects, with Estuary I covering 23%, Linnet Corner covering 60%, and Estuary II covering 17% of the offsite improvement costs.

Purpose: AHA contracted with J.H. Fitzmaurice, Inc. (JHF) for offsite improvements for North Housing Block A, such as the realignment of Lakehurst Circle, the new water main extension, and the new Mabuhay Street. Offsite improvement work is expected to be on a parallel track to the two active housing development projects (Estuary I and Linnet Corner). Therefore, the contract end date is October 2025, which aligns with the later of the two housing projects' expected completion date. The contracted value for the offsite improvements is budgeted for each of the housing developments in Block A and funding was approved by the Board of Commissioners in December 2023. There is a 'contractor's contingency' of \$150,000 in the contract that is 99% used. To project for the completion, staff have added \$450,000 in owner's contingency that is held outside the construction contract. Pro rata shares of all costs are planned for in the contingency trackers of Estuary I, Linnet Corner, and Estuary II.



Soil Off haul: In March 2025, the Board of Commissioners approved \$3,000,000 for soil off haul costs, and change orders were signed up to \$2,156,000. All soils have been off hauled as of May 23rd, and the costs are trending well under the maximum change order allowances. The site is undergoing final cleanup and hydroseeding to maintain compliance with the soils management plan.

Offsite completion tied to Estuary I:

The City of Alameda has approved a phasing plan so that appropriate levels of offsites are delivered with Estuary I and the remainder completed concurrent with Linnet Corner so that there is no hold up on certificates of completion for the earlier project. As Estuary I is to be completed first, staff have continued diligently pursuing the required offsite work completion, which includes site fencing, egress to public sidewalks, and grading of the adjacent U.S. Navy -held parcel.

Timeline: February 2024 to October 2025.

Status: As of May 30th, 2025, offsite improvement work has gone from 68% complete to 60% complete because of the addition of the soil off haul work as part of the overall contract. Contractor billing for May 2025 is \$121,771 and consists of landscape, irrigation, earthwork, erosion control, and contractor fees. As of May 30th, 2025, there have been twenty-three rain delay days that affected site work. This means that there were an additional thirteen days of weather delays taken on top of the ten contract budgeted days. The project is on schedule and staff are monitoring the project schedule closely. Details on the contract status and contingency used are attached

### **FISCAL IMPACT**

The Board of Commissioners approved the funding for the North Housing Master-Plan in August and December 2023, and for the soil offhaul in April 2025.

### **CEQA**

Not Applicable

### **RECOMMENDATION**

Accept the Monthly Report for North Housing Offsites.

### **ATTACHMENTS**

1. Att1\_OFFSITE Monthly Budget Report
2. Att 2\_Offsite Soil Off Haul Photos

Respectfully submitted,



With support from Sylvia Martinez, Director of Housing Development  
Jocelyn Layte, Acting Associate Project Manager



**North Housing Block A - Offsite Improvements Contract Tracking**  
**Update - as of May 30 2025**

<b>General Contract Status</b>	
Total Contract Value	\$4,015,747
Change Orders	\$2,371,083
Revised Contract Value	\$6,386,830
Value of Work Completed to Date	\$3,821,594
Retention Withheld	\$372,601
Amount Paid to Date	\$3,448,992
Balance to Finish	\$2,937,838
% Construction Complete	60%

<b>Contract Contingency Utilization</b>	
	Hard Cost
Total Contract Contingency	\$150,000
Approved Contract Contingency Usage To Date	\$148,457
Remaining Balance of Contract Contingency	\$1,543
% of Contract Contingency Used	99%

<b>Owner Contingency Utilization</b>	
Total Owner Contingency Outside of Contract	\$450,000
Approved Owner Contingency Usage To Date	\$214,627
Remaining Balance of Owner Contingency	\$235,373
% of Owner Contingency Used	48%



# North Housing Offsite: Soil Off haul



Offsites Soil stockpiles as of March 2025 prior to off hauling.



Offsites Soil stockpiles location as of Mid-May 2025.





A truck loaded for off haul delivery from excavator.



Overview of stockpiles showing progress of week one.



Excavator moving soil to load trucks form stockpile.



Housing Authority  
of the  
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---

To: Honorable Chair and Members of the Board of Commissioners

From: Sylvia Martinez, Director of Housing Development

Date: June 18, 2025

Re: Accept the Monthly Development Report for The Poplar and  
Approve the Executive Director to Execute Contract Amendments  
Not to Exceed \$125,000 with Renew Urban Development.

---

### **BACKGROUND**

The Housing Authority of the City of Alameda (AHA) purchased the property at 2615 Eagle Avenue in March 2022. AHA has a goal of serving 50 families with affordable housing, with up to 25% supportive housing apartments if required by funding sources. The development will have a preference for Alameda Unified School District (AUSD) staff, as well as a live/work preference for Alamedans.

In December 2023, the Board agreed to enter into a \$3.4 million pre-development loan from Capital Impact Partners Bay's Future Fund (BFF) to fund the acquisition and pre-development of this site for up to four years. In February 2024, the Board approved a \$2.1 million pre-development loan from the Reserve Policy to supplement the BFF loan amount. In March 2024, the Board approved an option to ground lease with a 20-year term to Island City Development (ICD).

AHA has received redevelopment funding from the City of Alameda totaling \$4,888,053. The project is able to spend an additional \$2,000,000 on work to further the project by June 2025. In March 2024, the project was awarded \$534,565 in Equitable Community Revitalization Grant (ECRG) funds from the Department of Toxic Substances Control Office of Brownfields. The grant has a two-year term (March 2024 to March 2026). Grant funds are disbursed on a reimbursement basis and can only be used for environmental site investigation activities.

Please see previous Board Reports for project details prior to this month's update.

### **DISCUSSION**

#### **Environmental**

Staff continue to work with Rincon Consultants, Inc. (Rincon) on the environmental





investigation under the oversight of the San Francisco Bay Regional Water Quality Control Board (SFBRWQCB). This month, Rincon and their subcontractor removed two soil hot spots with lead levels that are characterized as non-Resource Conservation and Recovery Act (RCRA) hazardous levels, also known as California-only hazardous waste (California levels are typically stricter than federal levels). Approximately 80 cubic yards of soil were removed under legal and environmental guidance and disposed of at a landfill identified to accept the soil characterized at non-RCRA levels. The edges of the excavation have been tested, and no further excavation is deemed necessary. The remainder of the site tested at non-hazardous levels, which are below both California and federal levels for residential use. Staff will continue to update the Board on any additional testing and findings.

#### Staffing

Due to staff transition, staff recommend executing a contract with Renew Urban for development and project management services for The Poplar for the next year. Renew Urban is able to provide high-level and experienced oversight while working with the AHA Housing Development Specialist team on implementation, procurement, financial reporting, and other key items. The department intends to add one housing development specialist this summer to provide additional support to the department and its projects. Staff recommends that the Board approves the attached amendment with Renew Urban Development. Costs will be borne by the development through its current pre-development and future construction sources.

#### Community Outreach

As part of the design and entitlements process, staff will host community meetings to ensure that members of the Alameda community are made aware of The Poplar redevelopment project, including the environmental cleanup and demolition activities onsite, and give the opportunity to get involved with the process and/or comment on the Development Plan for the site as it takes shape. The Poplar community meetings will begin in late summer 2025. The updated community meeting schedule is attached.

Board members and the public are encouraged to attend. The public can also sign up for notifications about The Poplar by following these instructions:

1. Go to this link: <https://www.alamedahsg.org/future-communities/>
2. Scroll down and click "Newsletter Sign Up"
3. Fill out the contact information and check the box for "The Poplar"

#### Use of Redevelopment Funding

The City of Alameda (City) redevelopment funding of \$2,000,000 for fiscal year 2024-2025 awarded to the project must be incurred by June 30, 2025, or risk forfeiture. Staff shared a plan in May 2025 to spend the remaining funds on soft cost contracts with the project's vendors and deposits with the City of Alameda for the benefit of the project. Staff continue to implement the spending plan. Staff is working on these payments now and so the pre-development funding report is pending and will be presented at the August BOC.

### Demolition

A National Environmental Policy Act (NEPA) Part 58 environmental study, abatement of hazardous building materials, and disposition of surplus property on site will be completed prior to demolition of the existing buildings. The HUD Authority to Use Grant Funds (AUGF) is required prior to taking any choice limiting actions on the site, which includes abatement and demolition activities. Prior to demolishing the existing buildings, materials containing lead, asbestos, and/or PCBs need to be properly abated and disposed of by a licensed contractor according to state and local regulations. Abatement and demolition are expected to be completed in winter 2025. Staff continue to review the abatement and demolition proposals, and will make a selection in an amount not to exceed the budget approved by the Board in May 2025.

### **FISCAL IMPACT**

Pre-development expenses at The Poplar are currently being funded by City redevelopment funding and the Capital Impact BFF loan. Environmental-specific costs are being reimbursed through the ECRG grant. An updated pre-development budget will be provided in August to reflect the current payments.

### **CEQA**

Not applicable.

### **RECOMMENDATION**

Accept the Monthly Development Report for The Poplar and Approve the Executive Director to Execute Contract Amendments Not to Exceed \$125,000 with Renew Urban Development.

### **ATTACHMENTS**

1. 25\_0603 - The Poplar\_Community Meetings Flyer

Respectfully submitted,

A handwritten signature in blue ink, appearing to read 'Sylvia', is written over a light blue circular stamp.

Sylvia Martinez, Director of Housing Development

# Please Join Us to Discuss **The Poplar**

The Housing Authority of the City of Alameda (AHA) cordially invites all community members to attend in-person meetings to share feedback on community needs regarding site layout, connectivity, programming, and environmental impacts for AHA's housing community named "The Poplar." The Poplar is located at 2615 Eagle Avenue in Alameda and will provide affordable rental housing to Alamedans and AUSD teachers and staff.

## Upcoming Community Meeting Topics & Locations:

### ***Site & Development Process Overview***

**Tuesday, August 19<sup>th</sup> at 6:00 - 7:30pm**

Rosefield Village - Community Room  
727 Buena Vista Ave., Alameda, CA

### ***Design Charette***

**Wednesday, September 10<sup>th</sup> at 6:00 - 8:00pm**

Independence Plaza - Community Room  
703 Atlantic Ave., Alameda, CA

### ***Site Reuse and Resiliency***

**Wednesday, October 1<sup>st</sup> at 6:00 - 7:30pm**

Littlejohn Commons - Community Room  
1301 Buena Vista Ave., Alameda, CA

### ***Final Development Plan***

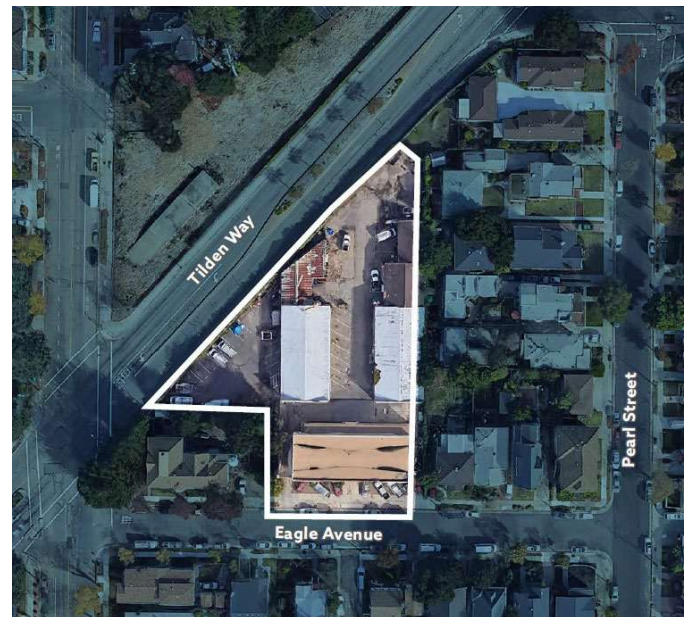
**Thursday, October 16<sup>th</sup> at 6:00 - 7:30pm**

Everett Commons - Community Room  
2437 Eagle Ave., Alameda, CA

### ***Environmental Conditions and Remediation***

**Wednesday, October 29<sup>th</sup>**

Time and location to be determined



A RSVP is not required but is preferred. For questions or to RSVP, please email [poplar@alamedahsg.org](mailto:poplar@alamedahsg.org).

To stay up to date with information on the project, we encourage you to sign up for the online Newsletter at [www.ahagroup.click](http://www.ahagroup.click)

**Thank you! We hope you can join us for one or more of our upcoming meetings.**



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Trevor Jones, Asset Manager

Date: June 18, 2025

Re: Accept the Quarterly LIHTC Portfolio Asset Management Fiscal Year-to-Date Financial Report through March 31, 2025.

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## **BACKGROUND**

The portfolio includes eight Low Income Housing Tax Credit (LIHTC) Partnership properties: Breakers at Bayport, Shinsei Gardens, Park Alameda, Jack Capon Villa, Littlejohn Commons, Stargell Commons, Rosefield Village, and Everett Commons. The projects were placed in service between 2006 and 2022 with a cumulative unit count of 347 units (85.6% family, 8.9% senior, and 5.5% for persons with disabilities), of which, 41% of the units are supported by a combination of various rental subsidy programs (Project-Based Voucher and Veterans Affairs Supportive Housing Project-Based Voucher).

The Housing Authority of the City of Alameda (AHA) owns all the land except for Park Alameda; thus, most partnerships include an AHA land lease, and AHA's role varies from Co-General Partner (Co-GP), General Partner (GP), to Special Limited Partner (SLP). Island City Development (ICD) is the developer for Rosefield Village, Littlejohn Commons, and Everett Commons and co-developer for Stargell Commons.

## **DISCUSSION**

This memo provides an overview of the Low-Income Housing Tax Credit (LIHTC) partnership properties' Year-to-Date financial report through March 31, 2025. These properties run on a fiscal year ending December 31st. This report tracks performance per the budget and includes achievements, items of note, and upcoming events or changes. Please note the figures used in this report may change and not match the audit.

Statements that apply to all properties:

- Operating Revenue- Includes tenant rent, rental subsidy, vacancy loss, laundry income, and interest on accounts. This is accounted for on a cash basis.
- Tenant Receivables- Property Management and Resident Services assist residents with applying for assistance and repayment agreements.



- Operating Expense- Includes marketing, administrative, property management fees, salaries and benefits, utilities, operating and maintenance, taxes and insurance, and resident services. This is accounted for on an accrual basis.
- Net Operating Income (NOI) Operating Revenue minus Operating Expense
- Debt Service Coverage Ratio will be denoted by DSCR. DSCR is calculated by dividing (NOI-Operating Expenses-Replacement Reserves) by Debt Service.
- Total Surplus Cash Flow will be distributed per the waterfall in accordance with the LPA, lender, and regulatory agreements.
- Conservice is a utility management provider that was employed at select properties in 2024..

#### Breakers at Bayport- 459 Neptune Gardens Avenue

Breakers at Bayport is a 52-unit Low Income Housing Tax Credit (LIHTC) development for families. Resources for Community Development (RCD) is the General Partner (GP) and The Breakers at Bayport L.P. is the Limited Partner (LP). The Housing Authority of the City of Alameda (AHA) owns the land. The Housing Authority of the City of Alameda (AHA) provided an original loan of \$2,015,000 and has a current balance of \$1,408,790, that bears no interest and matures in January 2059. John Stewart Company (JSCo) provides property management services. Operation Dignity provides resident services. The project was placed in service on March 29, 2006.

Unit matrix: 2Bed- 34 units, 3Bed- 18 units (1 Manager Unit)

Section 8 PBV: 15 units

Income and rent limits: 50%-60% AMI

- Operating Revenue is \$323,633, which is 1.2% (\$3,683) higher than budget.
- The property was 99% occupied in the first quarter of 2025.
- Tenant Revenue is \$179,260 and Subsidy Revenue is \$145,625.
- Tenant Accounts Receivable are \$36,895. No tenants are currently facing termination for nonpayment. This includes residents with balances over 6 months delinquent.
- Operating Expenses are \$158,113, which is 7% (\$12,273) lower than budget due to collection loss being coded as an expense.
- Net Operating Income is \$165,520, which is 11% (\$15,956) higher than budget, primarily as a result of the timing of utility payments.
- The Replacement Reserve deposit requirement is \$15,500 annually.
- Mandatory hard debt service is \$139,152 annually.
- Total Net Cash Flow is \$126,857.
- DSCR is 4.65x.
- An Asset Management Fee of \$3,460 is paid annually to AHA.

#### Shinsei Gardens- 401 Willie Stargell Avenue

Shinsei Gardens is a 39-unit Low Income Housing Tax Credit (LIHTC) development for families. RCD is the GP, and ICD is in the LP. AHA owns the land, and has a continuing operating agreement with RCD to manage the property along with AHA. AHA closed on the investor Limited Partner buyout in March 2024 and has an option to buyout the GP within the next five years. The John Stewart Company (JSCo) provides property management services. Operation Dignity provides resident services. There is a loan of \$2,129,336 from AHA/CIC that bears no interest and matures on March 23, 2063. The project was placed in service on September 3, 2009.

Unit matrix: 1Bed- 6 units, 2Bed- 18 units, 3Bed- 12 units (1 Manager Unit), 4Bed- 3 units

Section 8 PBV: 21 units

Income and rent limits: 20%-60% AMI

- Operating Revenue is \$264,009, which is 4% (\$10,520) lower than budget.
- Occupancy averaged 90% (3> vacant units) over the First Quarter of 2025.
- Tenant Revenue is \$123,040 and Subsidy Revenue is \$166,502.
- Tenant Accounts receivable are \$1,198. No tenants are currently facing termination for non-payment.
- Operating Expenses are \$142,141, which is 4% (\$5,626) higher than budget due to some administrative costs being higher than anticipated.
- Net Operating Income is \$121,868, which is 12% (\$16,146) lower than budget due to vacancies averaging 90% compared to the budgeted 98% occupancy.
- Replacement Reserve deposit requirement is \$23,400 annually.
- No mandatory hard debt service.
- Total Net Cash Flow is \$116,018.
- DSCR is not applicable due to no hard loans.

Park Alameda- 2428 Central Avenue

Park Alameda is a 62-unit Low Income Housing Tax Credit (LIHTC) development for families. RCD is the managing Co-GP, AHA is the Co-GP, and Union Bank (UB) is the LP. AHA holds an Option to exercise the Right of First Refusal (ROFR) which can be executed on or after January 2025. AHA will be starting shortly on this and expects to make a similar arrangement as was done at Shinsei. RCD, the GP, owns both the land and the property. There is a loan of \$8,600,000 from AHA/CIC that bears no interest and matures in September 2068. JSCo provides property management services. Operation Dignity provides resident services. The project was placed in service on December 27, 2012.

Unit matrix: 0Bed- 61 units, 2Bed- 1 unit (manager unit)

Section 8 PBV: 15 units

Income and rent limits: 50%-120% AMI

- Operating Revenue is \$208,288, which is 9% (\$19,828) lower than budget as a

result of occupancy being lower than budget.

- Occupancy averaged 87% (8 Vacant Units) over the First Quarter of 2025. The primary contributing factors for the move-out were deaths and evictions. The combination of higher than expected move-outs, the seasonal holiday slowdown in leasing and the waitlist being re-opened in November resulted in longer than usual turnover and higher vacancy.
- Tenant Revenue is \$133,278 and Subsidy Revenue is \$104,228.
- Tenant Accounts Receivable are \$109,532. Of this total, \$93,706 is over 120 days old. No tenants are currently facing termination for nonpayment.
- Operating Expenses are \$172,239, which is within 1% of the budget.
- Net Operating Income is \$36,049, which is 34% (\$18,305) lower than budget. Our goal is to get back on budget once the waitlist is compiled and ready to be shared with the property in the second quarter of 2025.
- Replacement Reserve deposit requirement \$31,932 annually.
- No Mandatory Hard Debt Service.
- Total Net Cash Flow is \$28,067.
- DSCR is not applicable due to no hard loans.

#### Stargell Commons- 2700 Bette Street

Stargell Commons is a 32-unit Low Income Housing Tax Credit (LIHTC) development for families. RCD is the GP, Wells Fargo Bank (WFB) is the LP, and ICD is the SLP. AHA owns the land and also provided a loan of \$2,000,000 at 3% interest payable through excess/distributable cash with a maturity date of December 2072. As of December 2024, no principal payments have been made and \$238,298 of interest has been accrued. AHA holds an Option to exercise the Right of First Refusal (ROFR), which can be exercised on or after December 31, 2031. JSCo provides property management services. Operation Dignity provides resident services. The project was built in May 2017.

Unit matrix: 1Bed- 5 units, 2Bed- 17 units (1 Manager Unit), 3Bed- 10 units

Section 8 PBV: 7 units

Income and rent limits: 30%-60% AMI

- Operating Revenue is \$157,339, which is 8% (\$12,918) lower than budget as a result of higher vacancies.
- Occupancy averaged 94.3% (2 vacant units) over the First Quarter of 2025. We budgeted aggressively as a result of sustained high occupancy in 2024 at 97.5%.
- Tenant Revenue is \$108,594 and Subsidy Revenue is \$56,433.
- Tenant Accounts Receivable are \$46,115. No tenants are currently facing termination for nonpayment.
- Operating Expenses are \$118,240, which is 2% (1,871) higher than budget.
- Net Operating Income is \$39,099 which is 27% (14,789) lower than budget due to lower than budgeted occupancy.



- Replacement Reserve deposit requirement is \$19,200 annually.
- Mandatory hard debt service is \$69,156 annually.
- Total Net Cash Flow is \$17,010.
- DSCR is 1.98.

#### Jack Capon Villa- 2216 Lincoln Avenue

Jack Capon Villa is a 19-unit Low Income Housing Tax Credit (LIHTC) development for persons with developmental disabilities. Satellite Affordable Housing Associates (SAHA) is the managing Co-GP, AHA is the Co-GP, and Bank of America (BoFA) is the LP. AHA owns the land and also holds an Option to exercise the Right of First Refusal (ROFR), which can be executed on or after December 31, 2028. AHA has 3 current loans secured by the property. The first loan with AHA was for \$225,000 and an interest rate of 5% was paid off at Maturity in November 2024. The second AHA/CIC loan was for \$1,400,000 with an interest rate of 3% and as of December 2024 had a balance of \$1,400,000, excluding accrued interest of \$408,769. The third AHA loan was for \$200,000 with an interest rate of 3% and deferred payments until 2070. SAHA Property Management provides property management services. The Housing Consortium of East Bay (HCEB) provides resident services. The project was placed in service on January 09, 2014.

Unit matrix: 1Bed- 16 units, 2Bed- 3 units (1 Manager Unit)

Section 8 PBV: 18 units

Income and rent limits: 50% AMI

- Operating Revenue is \$136,402 which is 7% (\$9,158) higher than budget due to the property being 100% occupied in the first quarter.
- Occupancy averaged 100% (0 vacant units) in the First Quarter.
- Tenant Revenue is \$26,124 and Subsidy Revenue is \$106,076.
- Tenant Accounts Receivable are \$2,323.
- Operating Expenses are \$102,906, which is 7% (\$7,283) lower than budget due to conservative budgeting.
- Total Net Operating Income is \$33,496, which is 96% (\$16,441) higher than budget.
- Replacement Reserve deposit requirement is \$11,400 annually.
- Mandatory hard debt service is \$28,632 annually.
- DSCR is 4.28.
- Total Net Cash Flow is \$23,488.
- The property ended the first quarter of 2025 fully occupied, allowing the property to save on expenses that would normally accompany turning units.

#### Littlejohn Commons- 1301 Buena Vista Avenue

Littlejohn Commons is a 31-unit Low Income Housing Tax Credit (LIHTC) development

for seniors. ICD is the GP and NEF is the LP. ICD also holds an Option/ Right of First Refusal which can be executed on or after August 1, 2030. The Partnership entered into a ground lease with the landowner, AHA, which expires December 31, 2115. FPI Management provides property management services. LifeSTEPS provides resident services. The project was placed in service on July 31, 2018.

Unit matrix: 1Bed- 30 units, 2Bed- 1 unit (manager's unit)

Section 8 PBV: 25 units

Income and rent limits: 30%-50% AMI

- Operating Revenue is \$209,857, which is 4% (\$8,098) higher than budget.
- Occupancy was 99% in the First Quarter of 2025.
- Tenant Revenue is \$43,552 and Subsidy Revenue is \$172,598.
- Tenant Accounts receivable are \$590 with no consistent late-paying tenants.
- Operating Expenses are \$101,519, which is 7% (\$6,767), higher than budget due to plumbing repairs in two units and paying the 2024-2025 sewer tax bill in the First Quarter of 2025.
- Net Operating Income is \$108,338, which is 1% (\$1,331) higher than budget.
- Replacement Reserve deposit requirement is \$15,500 annually.
- Mandatory hard debt service is \$236,508 annually.
- Total Net Cash Flow is \$45,336.
- DSCR is 1.77 and will be monitored closely.

Everett Commons- 2437 Eagle Avenue

Everett Commons is a 20-unit Low Income Housing Tax Credit (LIHTC) development project for families. ICD is the GP and Enterprise is the LP. ICD also holds an option to exercise the Right of First Refusal (ROFR) which can be executed on, or after, the end of the compliance period in 2033. The Partnership entered a ground lease with the landowner, AHA, which expires June 1, 2116. FPI Management provides property management services. LifeSTEPS provides resident services. The project was placed in service on December 17, 2018.

Unit matrix: 1Bed- 4 units, 2Bed- 11 units (1 Manager Unit), 3Bed- 5 units

Section 8 PBV: 12 units

VASH PBV: 5 units

Income and rent limits: 30%-60% AMI

- Operating Revenue is \$115,870, which is 28% (\$44,209) lower than budget. This is primarily due to occupancy being lower than budget. The process of putting our wait list on hold, reopening it and organizing applicants to begin screening was a large undertaking that affected the lease timeline of PBV units. Additionally, our VASH applicants were delayed while we dealt with a site-level issue. The property also wrote off a resident who had accrued a large balance during the COVID moratorium and was evicted.

- Occupancy averaged 84% (3 vacant units) over the First Quarter of 2025.
- Tenant Revenue is \$47,753 and Subsidy Revenue is \$100,471.
- Tenant Accounts Receivables are \$860 after writing off a tenant who made up the majority of our aged receivables stemming from the COVID moratorium.
- Operating Expenses are \$59,991, which is 26% (20,687) lower than budget. This is primarily due to a reclass on the financials for a non-routine unit clean out that involved hazmat and was reimbursed by insurance.
- Net Operating Income is \$55,879, which is 30% (\$23,522) lower than budget due to our occupancy remaining low while we reopened the wait list and began getting VASH referrals again.
- Replacement Reserve deposit requirement is \$13,508 annually.
- Mandatory hard debt service is \$215,916.
- Total Net Cash Flow is (\$1,477).
- DSCR is 0.97. AHA will continue to monitor this property closely due to the low DSCR.

#### Rosefield Village – 727 Buena Vista Avenue

Rosefield Village is a 92-unit Low Income Housing Tax Credit (LIHTC) development project for families. ICD also holds an option to exercise the Right of First Refusal (ROFR) which can be executed on, or after, the end of the compliance period in 2033. The Partnership entered into a ground lease with the landowner, AHA, which expires December 31, 2115. FPI Management provides property management services. LifeSTEPS provides resident services. The project was placed in service in 2022.

Unit matrix: Studio- 8 units, 1Bed- 35 units, 2Bed- 26 units (1 Manager Unit), 3Bed- 23 units

Section 8 PBV: 23 units

Income and rent limits: 20%-80% AMI

- Operating Revenue is \$568,020, which is 5% (\$26,822) higher than budget. This is largely attributed to a reclass of laundry income that made Actual Other Income positive, while Budgeted Other Income was negative as a result of anticipated write-offs.
- Occupancy averaged 93.5% (6 vacant units) over the First Quarter of 2025. Rosefield was affected significantly by non-payment during the moratorium. While property management could not serve notices during the COVID Moratorium, residents let their delinquency build-up and many opted to move-out with large outstanding balances instead of going through the court process or working with LifeSTEPS. Staff have payment plans with those who are willing to work with LifeSTEPS and AHA. FPI and AHA are working hard to lease those units that vacated. Staff are holding weekly meetings with FPI.
- Tenant Revenue is \$194,166 and Subsidy Revenue is \$239,652.
- Tenant Accounts receivable are \$220,357. Nonpayment is being actively addressed.

- Operating Expenses are \$245,414, which is 5% (12,088) higher than budget due to staffing turnover onsite and at the regional level, which resulted in vending out work and hiring temp labor.
- Net Operating Income is \$322,606, which is 5% (\$14,734) higher than budget due to higher than budgeted expenses and an enhanced focus on leasing units back up.
- Replacement Reserve deposit requirement is \$55,200 annually.
- Mandatory hard debt service is \$613,355 annually.
- Total Net Cash Flow is 155,467.
- DSCR is 2.01. AHA will continue to monitor this property closely due to the low DSCR.

Overall, the portfolio is performing strongly and AHA has established watch lists with FPI and JSCo to address issues stemming from issues with tenant balances from the moratoriums put in place during the pandemic. As these moratoriums are peeled back, AHA is working creatively with LifeSTEPS, legal, and FPI to create payment plans and keep our units occupied and in good standing. All the assets are able to fulfill mandatory hard debt service and deposit reserves with a debt service coverage ratio averaging 2.6, ranging from 0.97 to 4.65. Also, most assets produce surplus cash/residual receipts for distribution. Reserve balances are attached.

#### **FISCAL IMPACT**

None

#### **CEQA**

N/A

#### **RECOMMENDATION**

Accept the Quarterly LIHTC Portfolio Asset Management Fiscal Year-to-Date Financial Report through March 31, 2025.

#### **ATTACHMENTS**

1. AHA LIHTC Q1 2025
2. Q1 25 Quarterly Financials

Respectfully submitted,  
Trevor Jones  
Trevor Jones, Asset Manager

# LIHTC Q1 2025 REPORT

Income is on an Accrual Basis

Expenses are on an Accrual Basis

Income Variance is calculated Actual-Budget

Expense Variance is calculated Actual-Budget

PUPY refers to Per Unit Per Year to Date

TREVOR JONES  
ASSET MANAGER

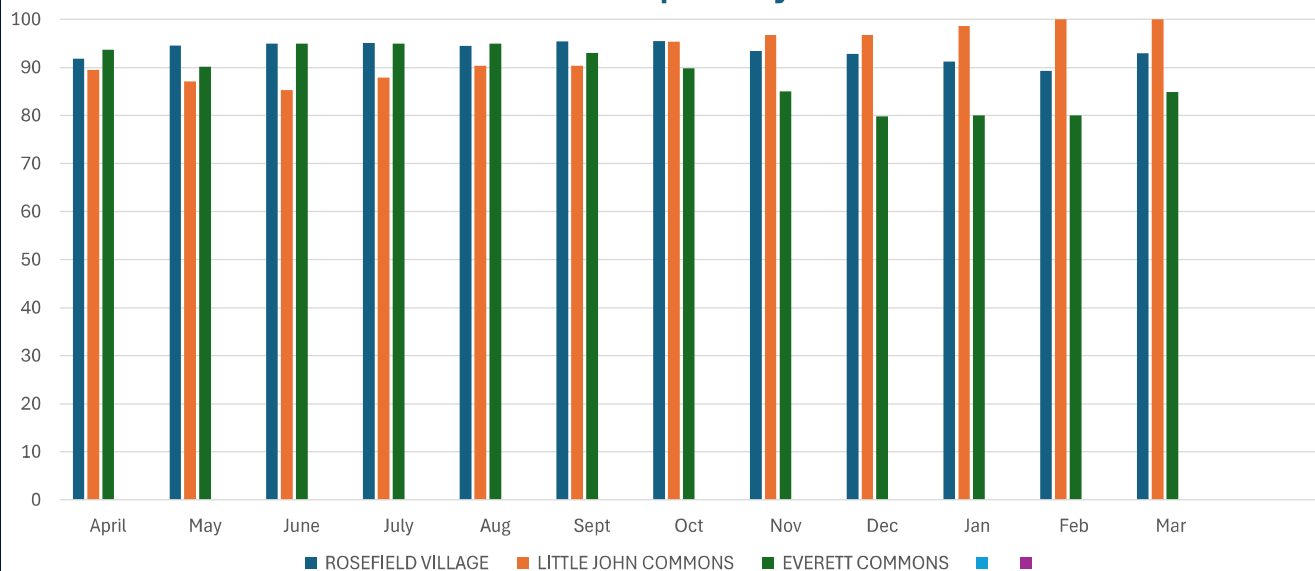


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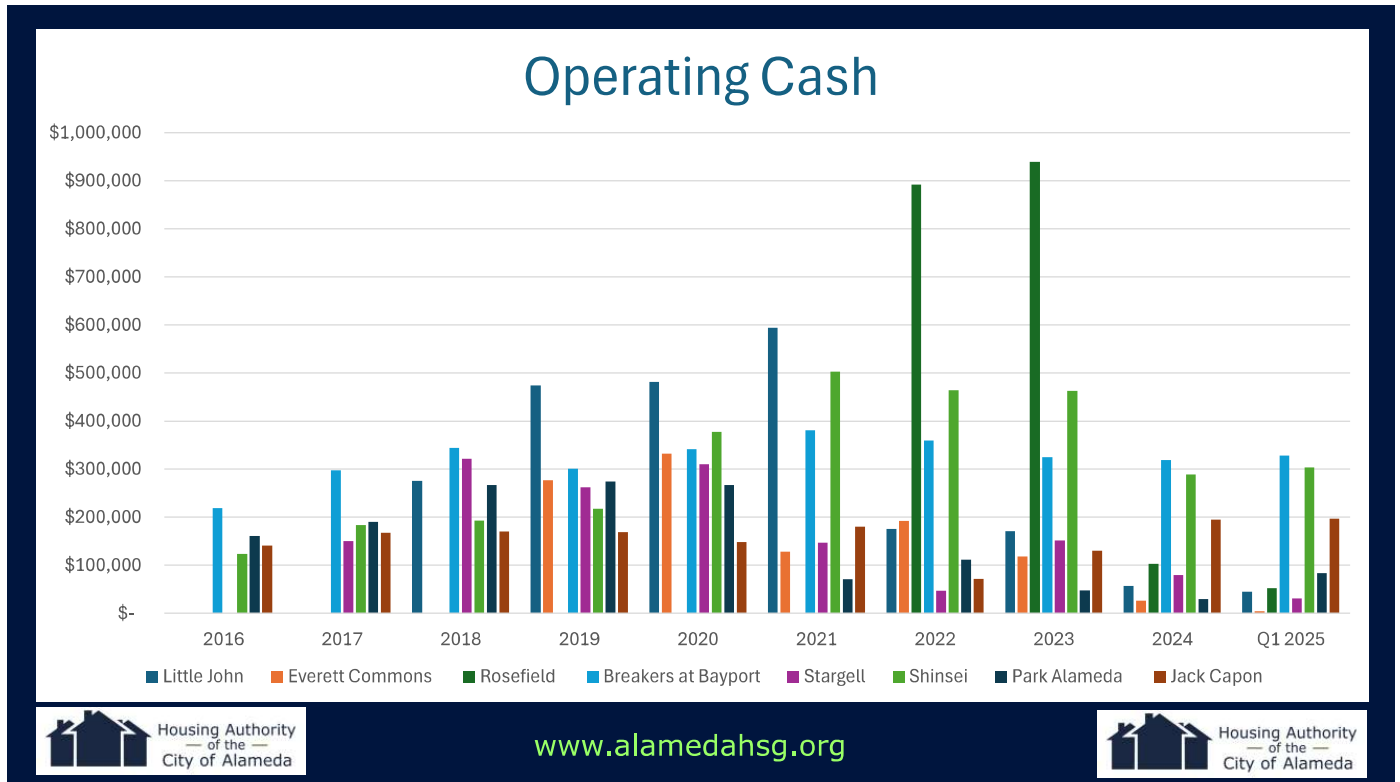
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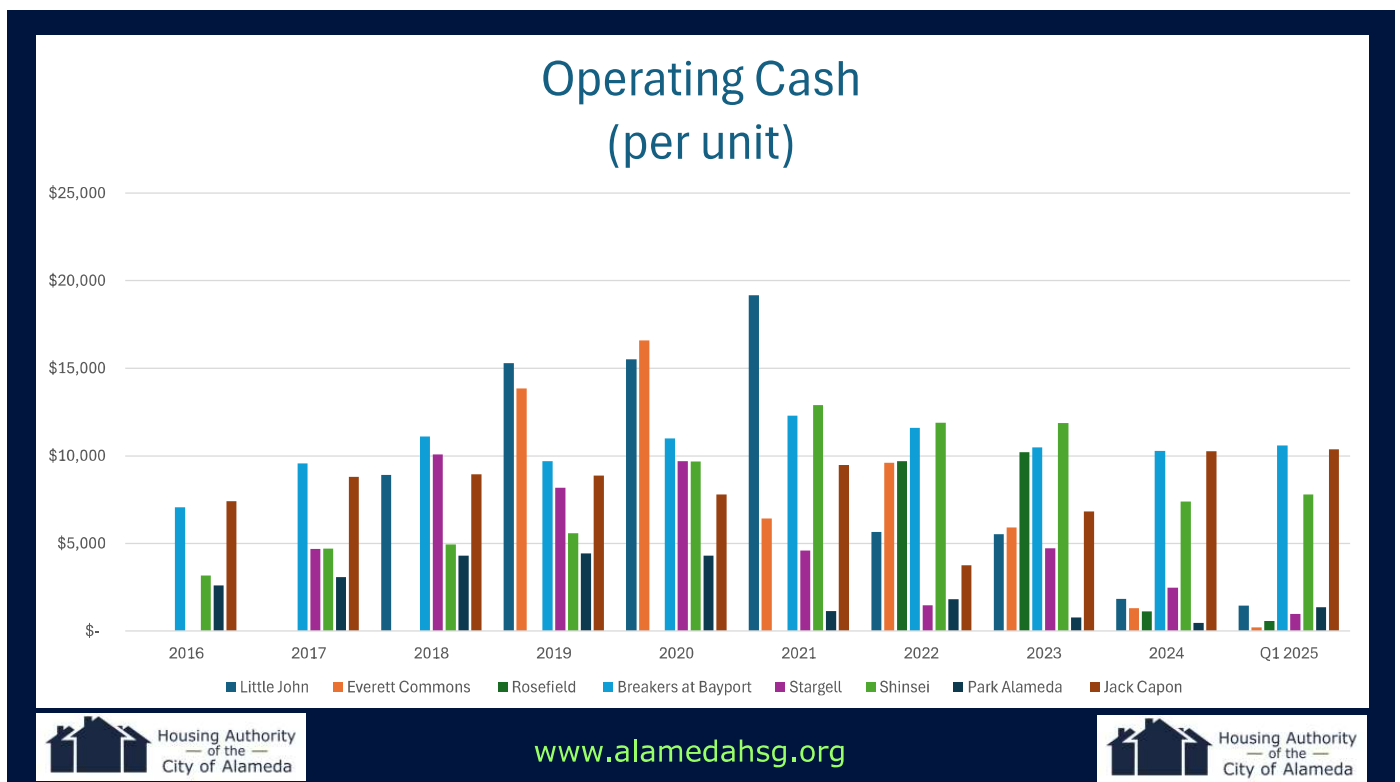
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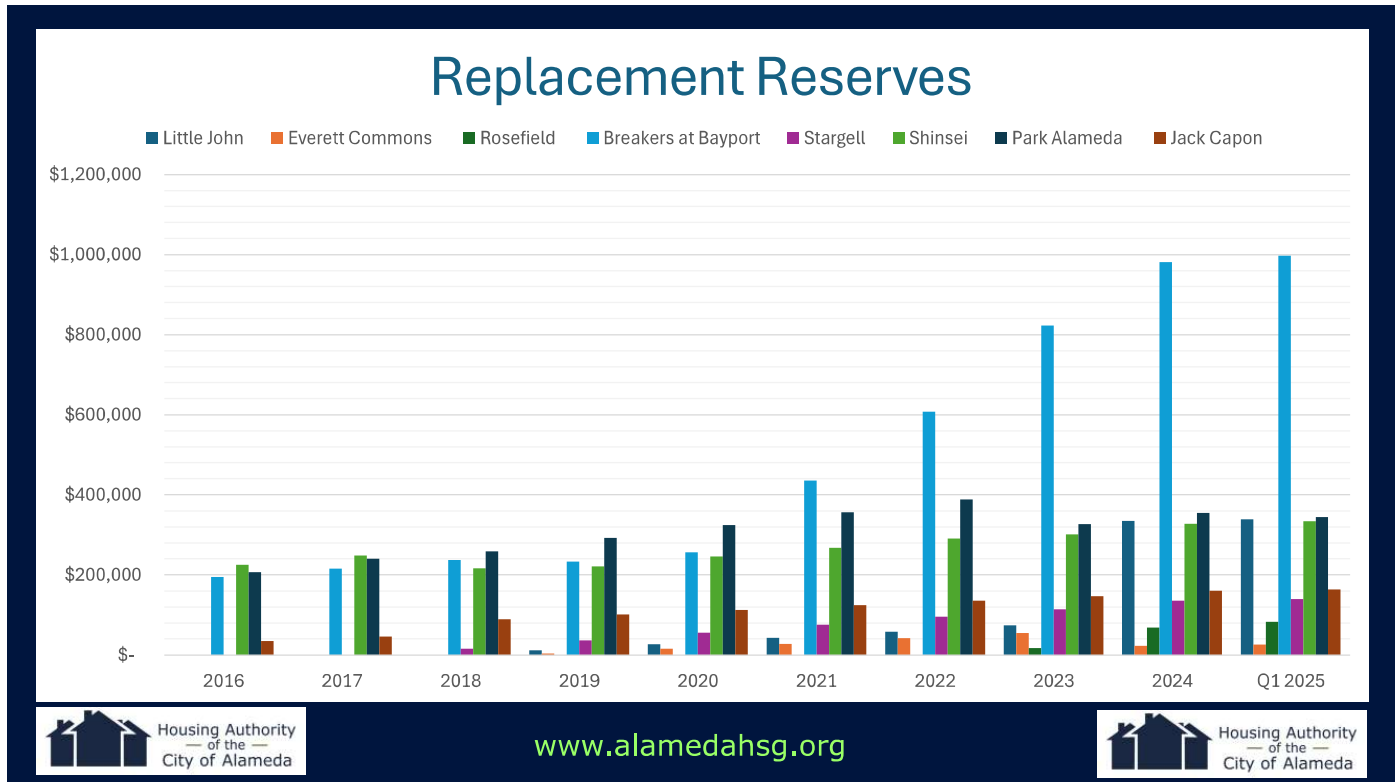
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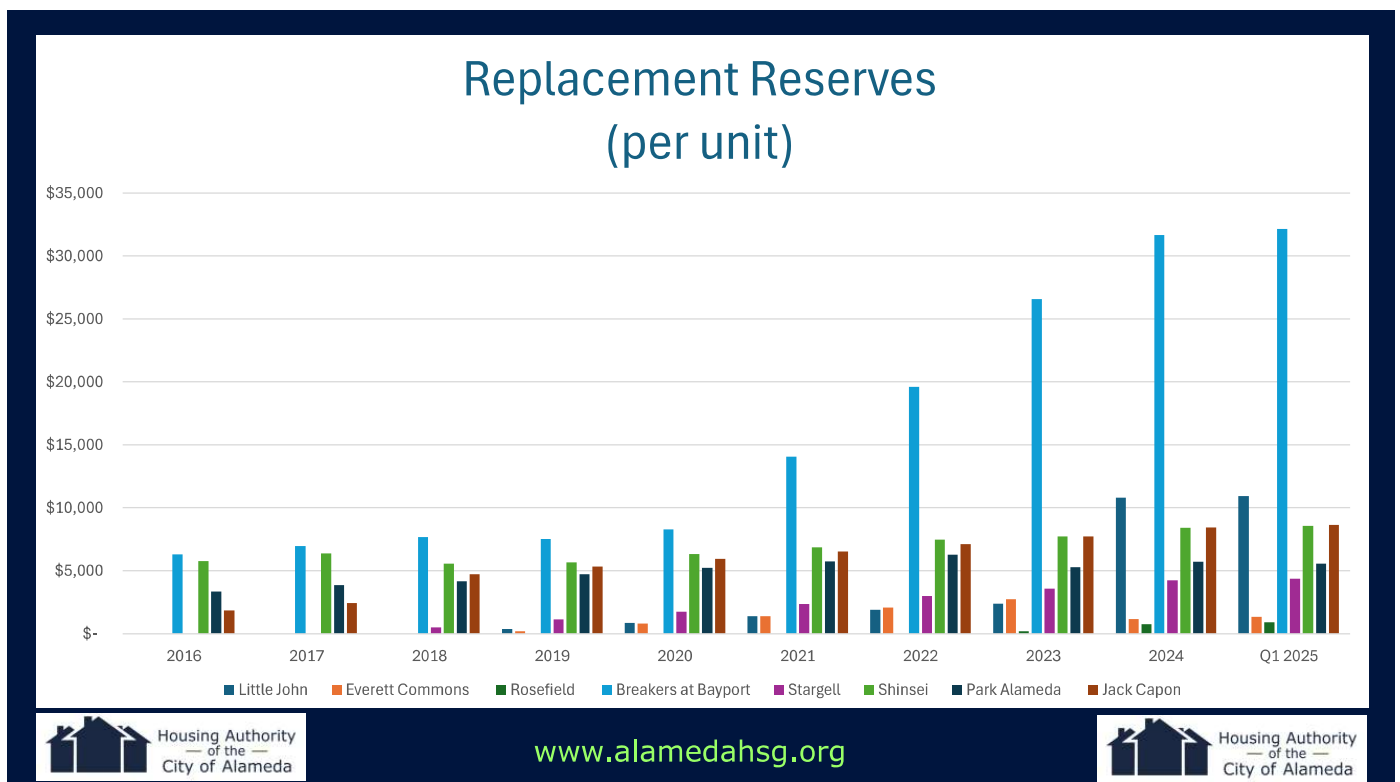
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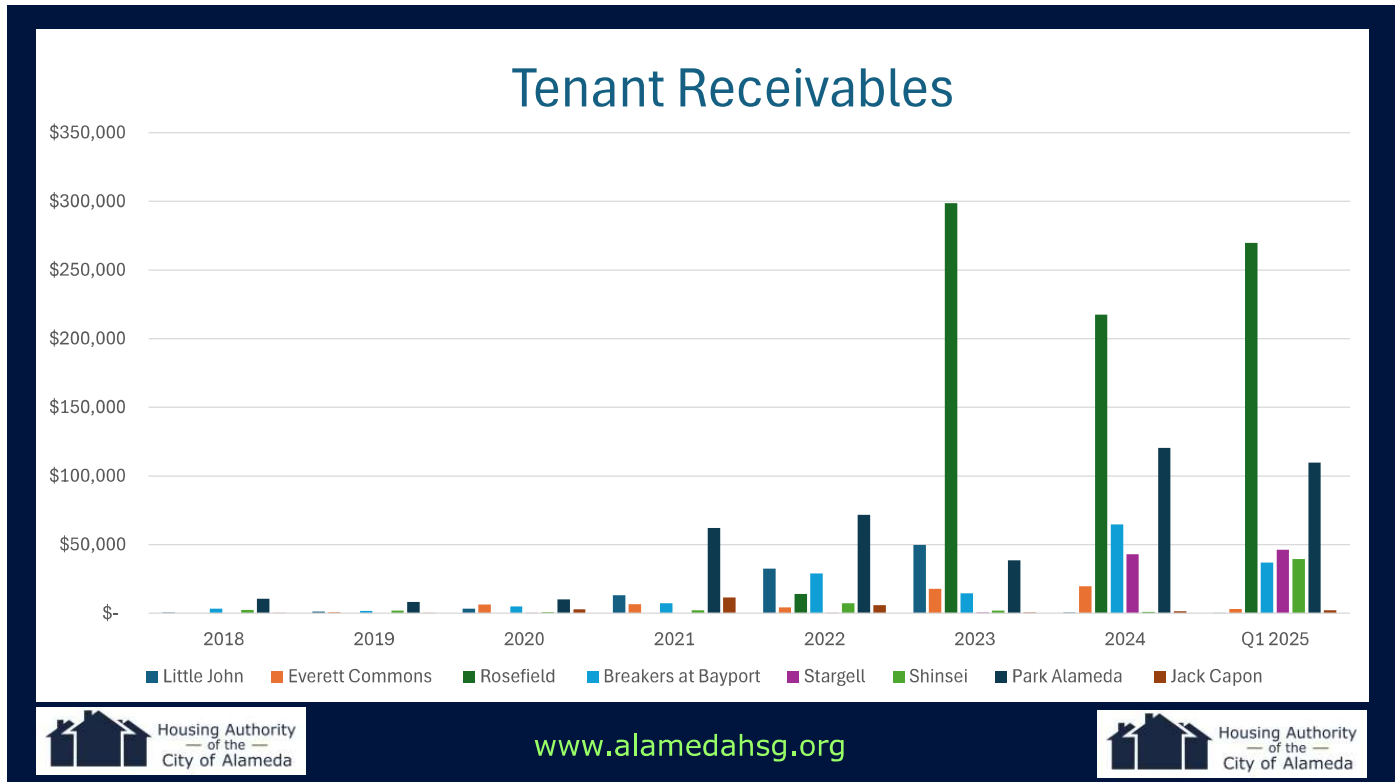


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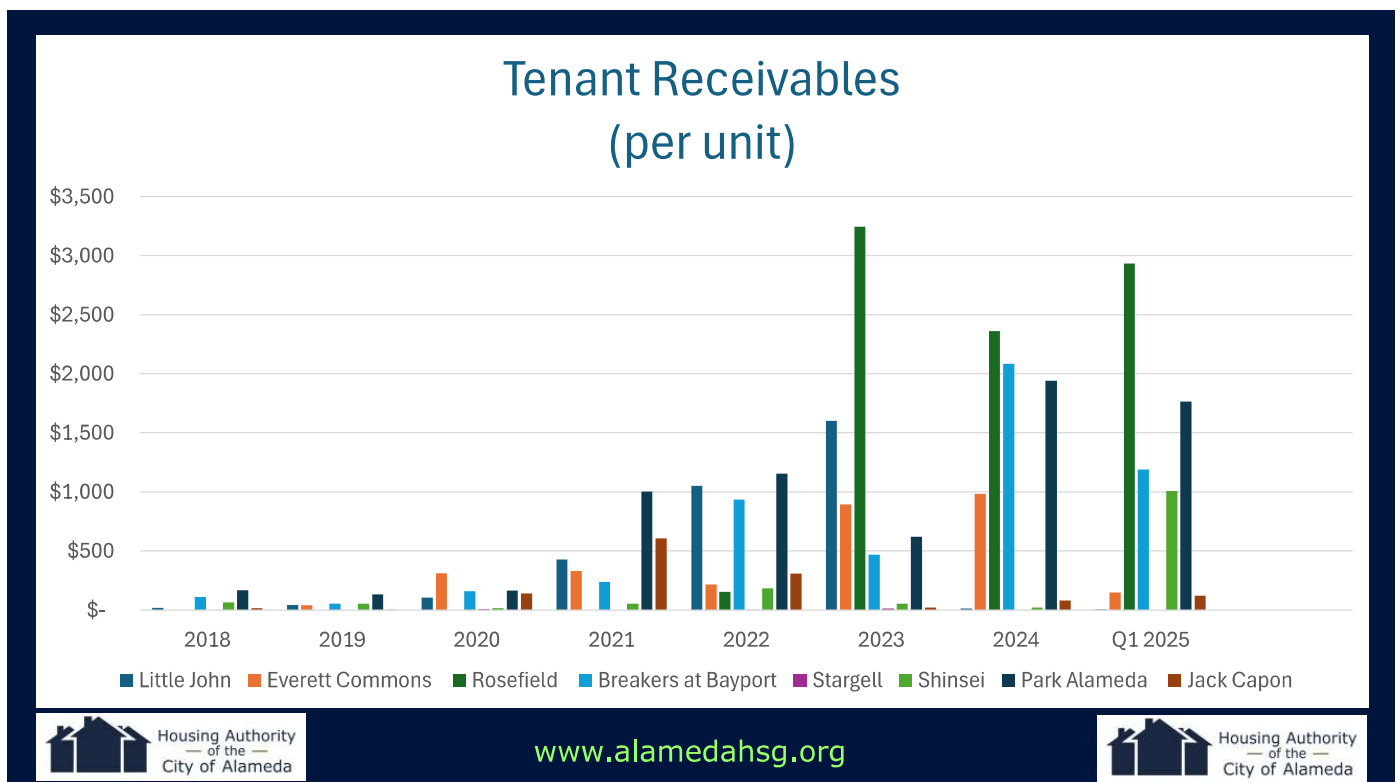


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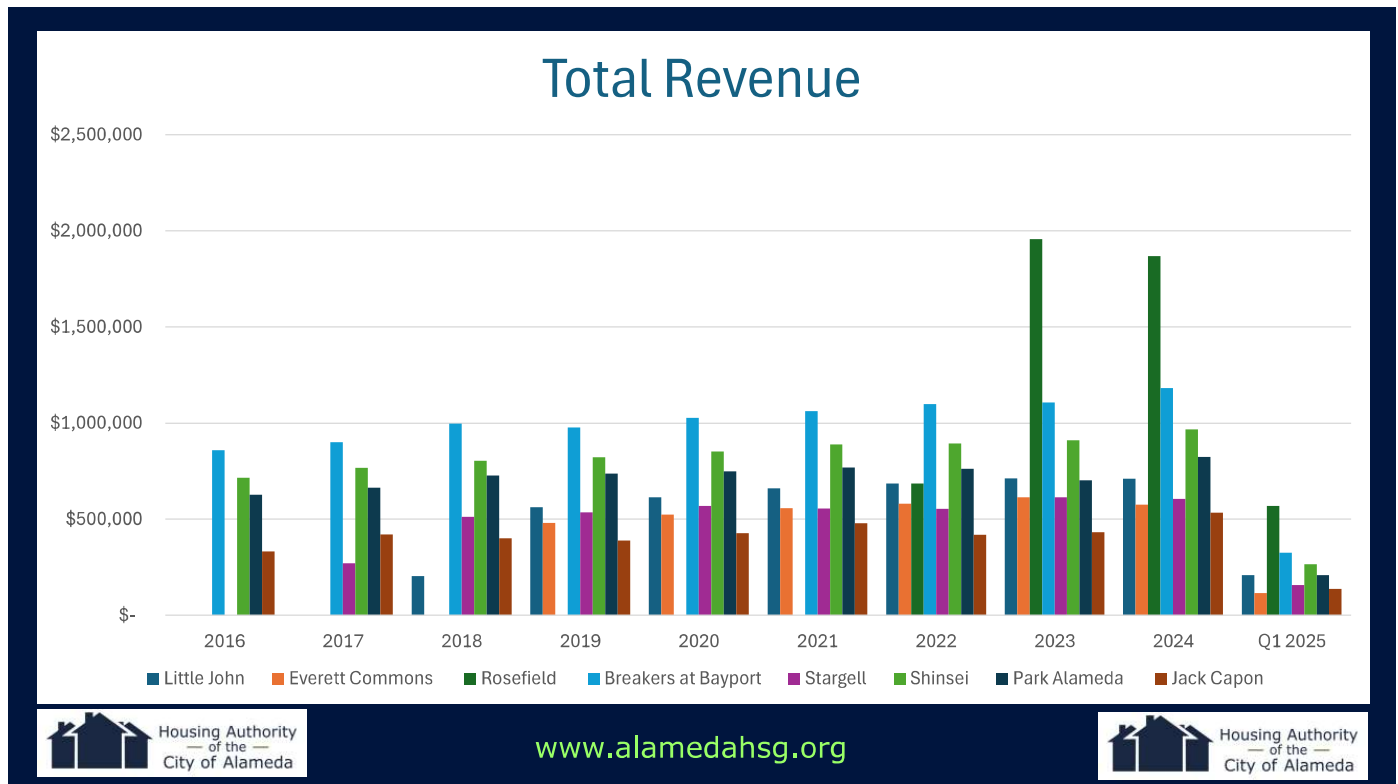




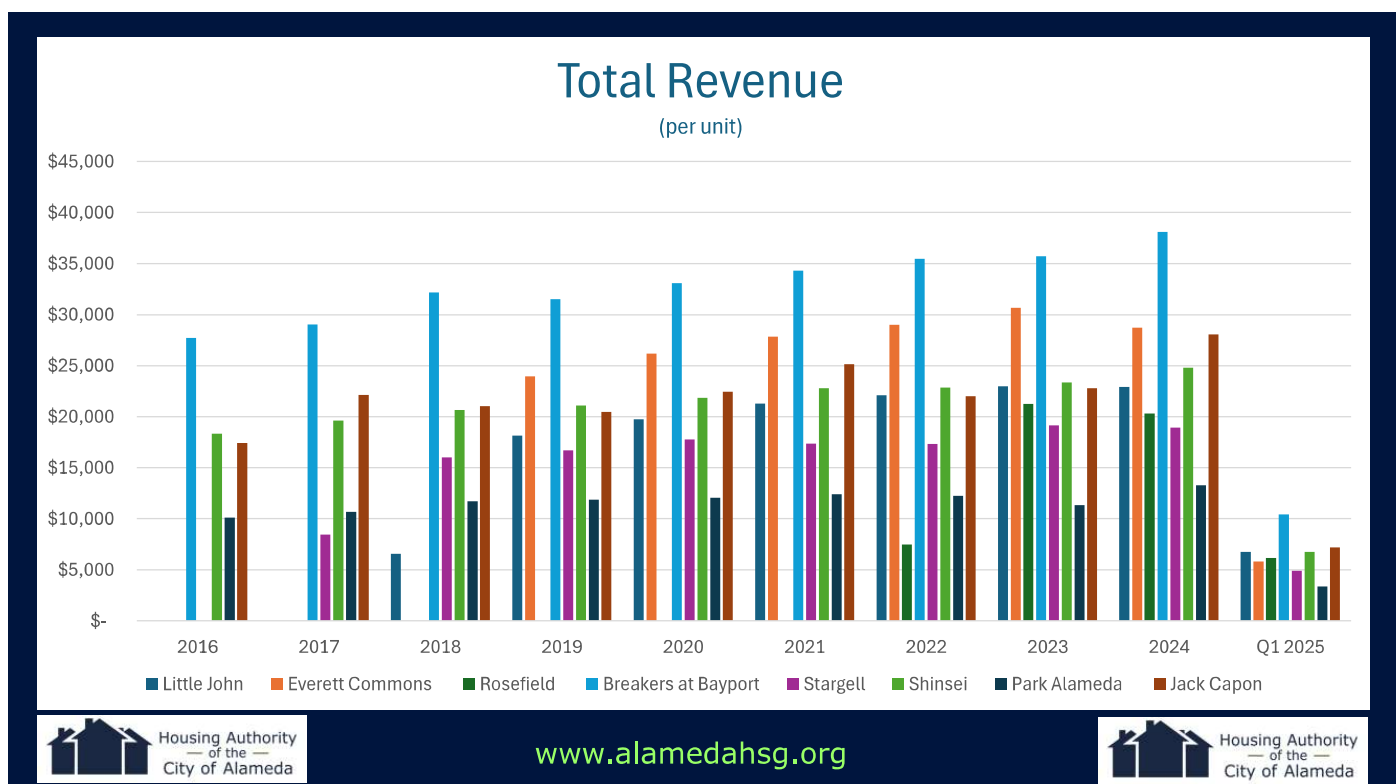
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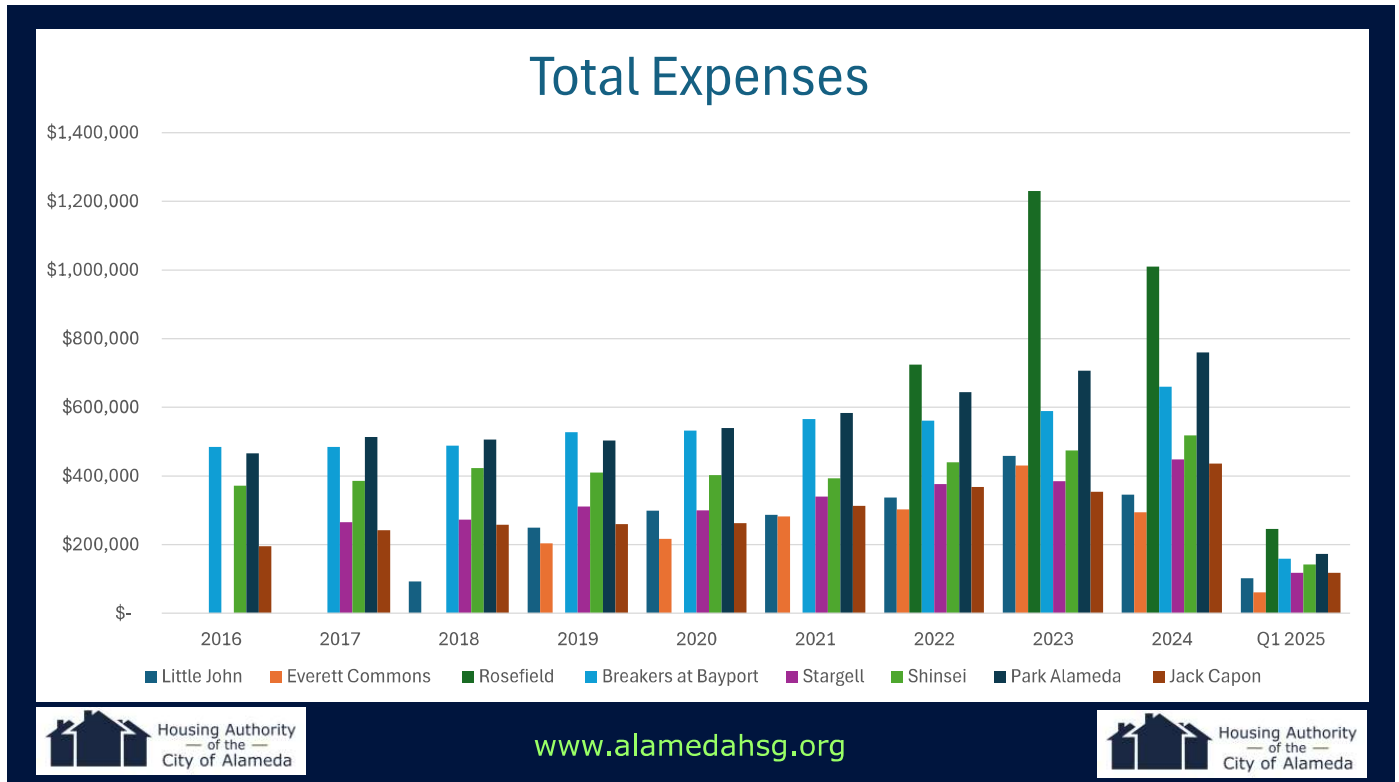
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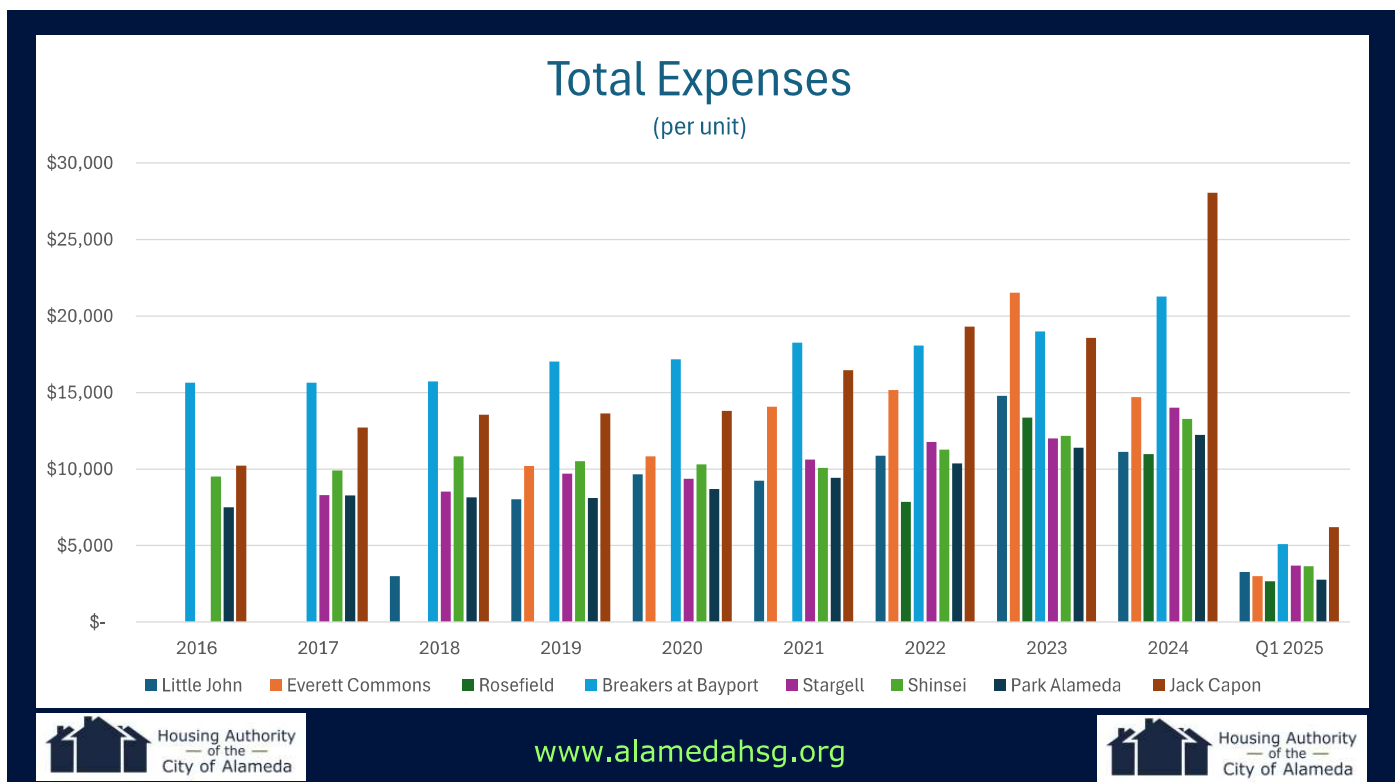
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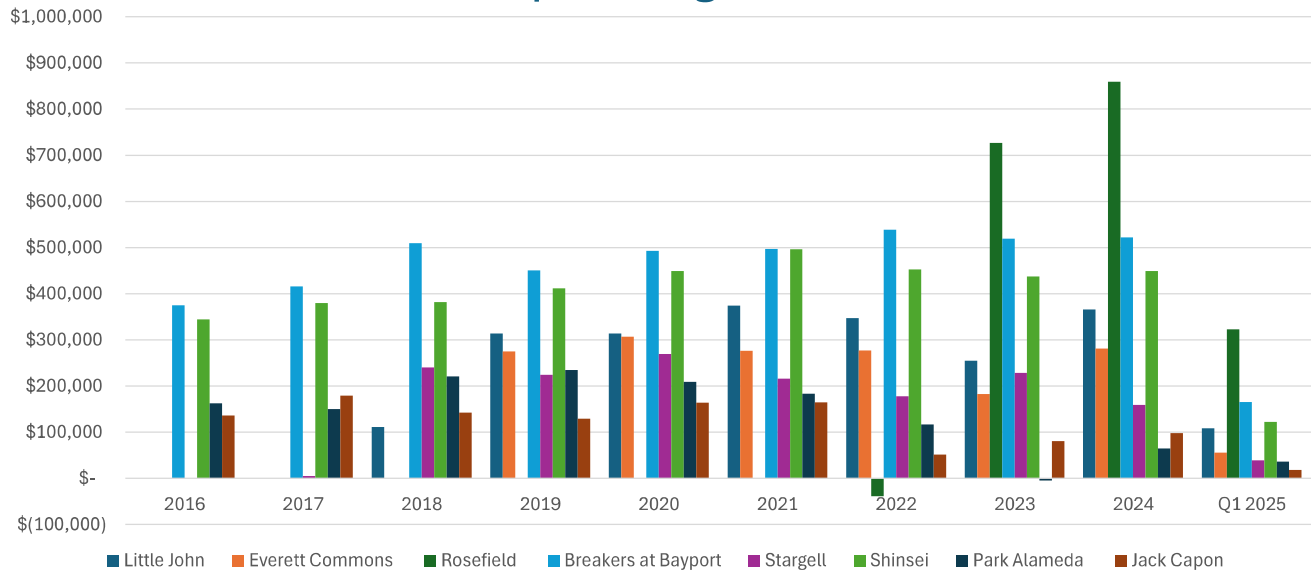


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## Net Operating Income

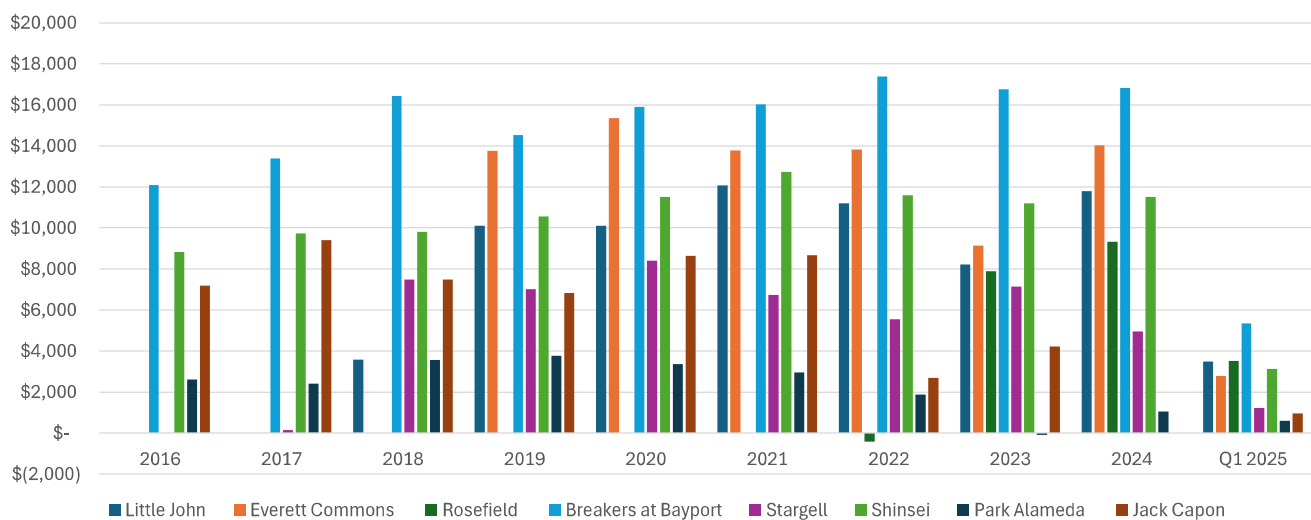


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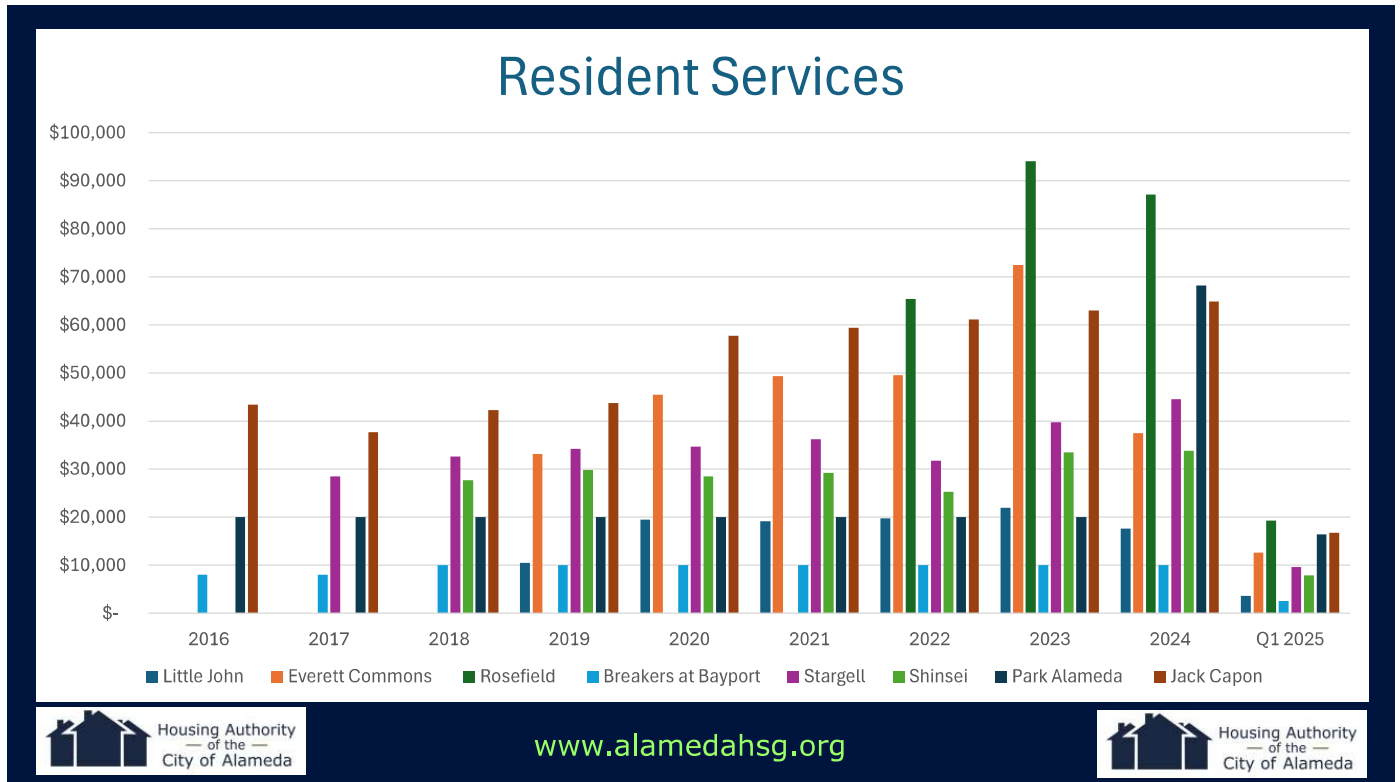
## Net Operating Income (per unit)



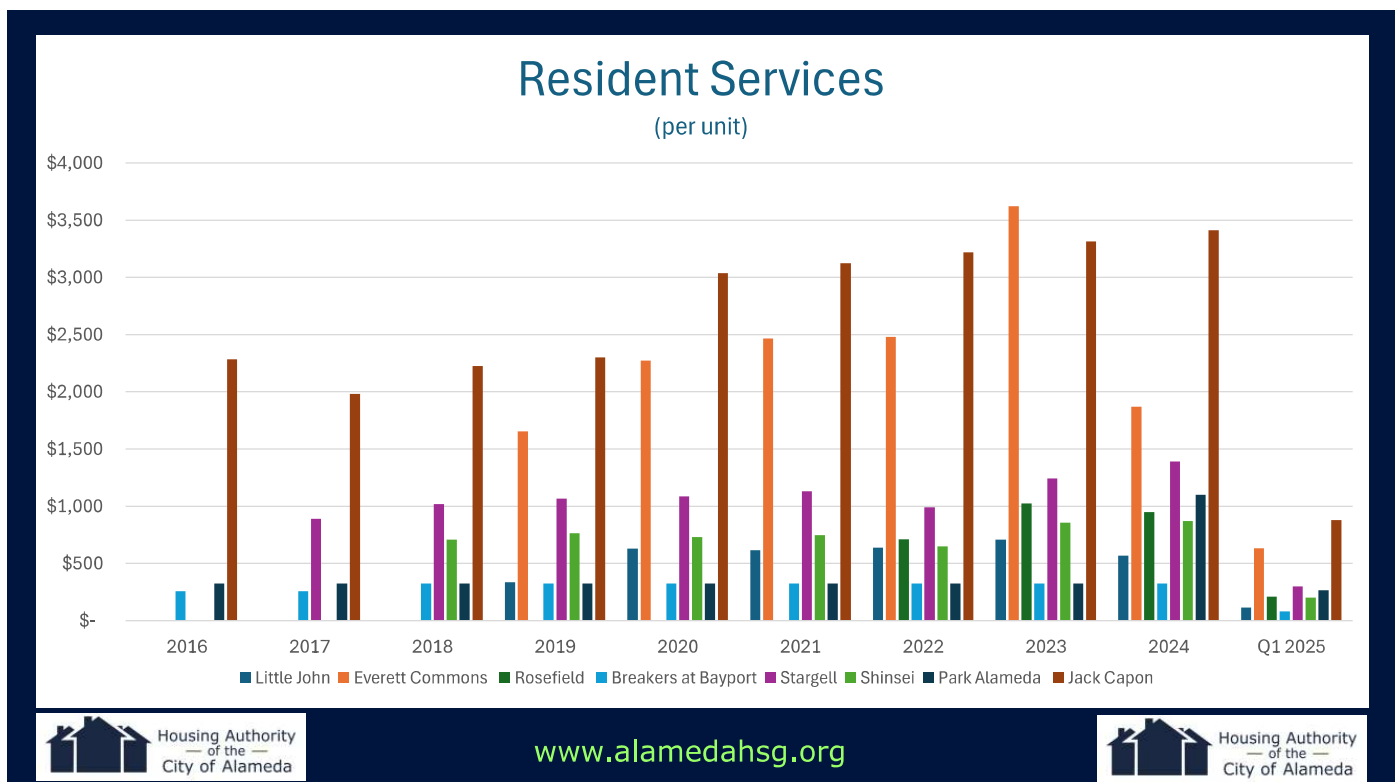
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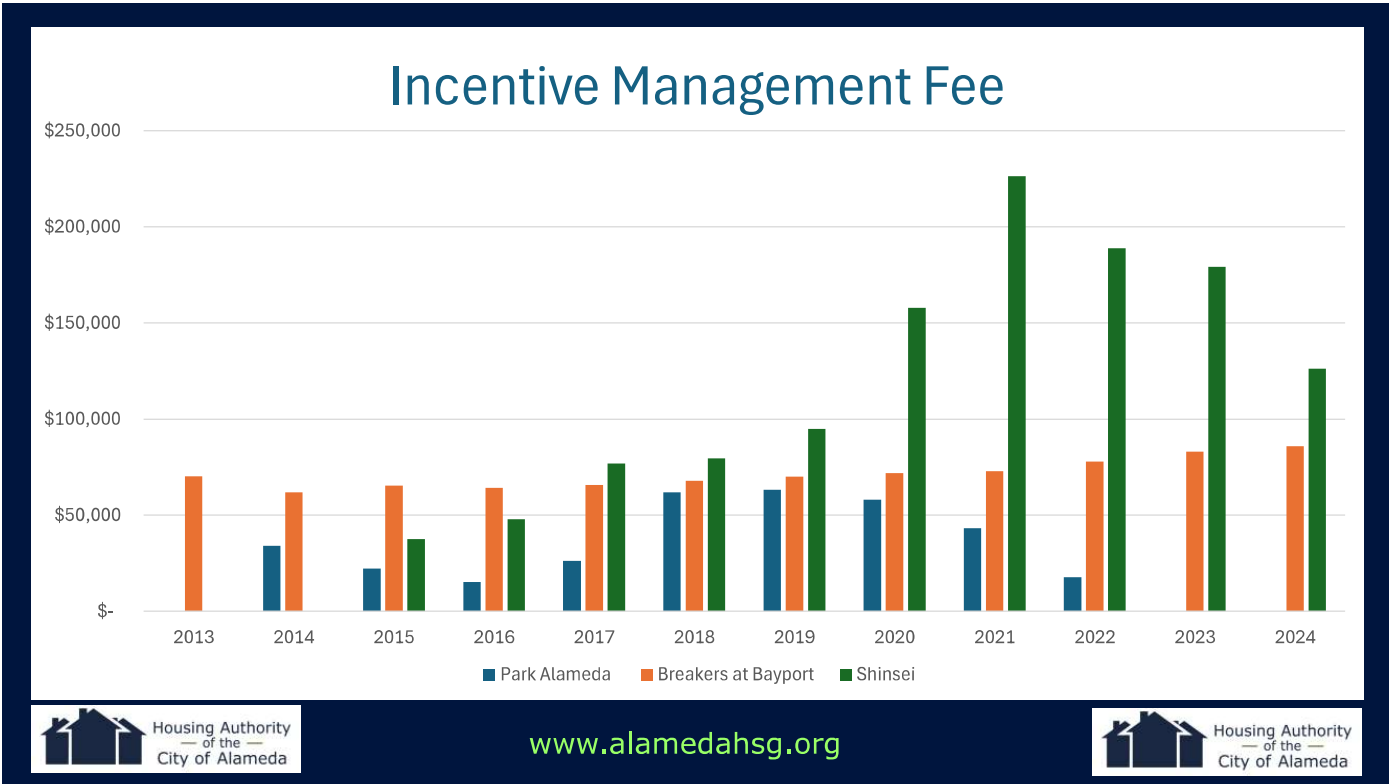


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## Breakers at Bayport

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 179,260	\$ 165,102	\$ 14,158	9%	\$ 13,789
Subsidy Revenue	\$ 145,625	\$ 160,607	\$ (14,982)	-9%	\$ 11,202
Vacancy Loss	\$ (2,639)	\$ (5,766)	\$ 3,127	-54%	\$ (203)
Other Income	\$ 1,387	\$ 7	\$ 1,380	N/A	\$ 107
<b>Total Operating Revenue</b>	<b>\$ 323,633</b>	<b>\$ 319,950</b>	<b>\$ 3,683</b>	<b>1.2%</b>	<b>\$ 24,895</b>
Administrative Expenses	\$ 57,525	\$ 55,088	\$ 2,437	4%	\$ 4,425
Utilities Expense	\$ 17,253	\$ 26,477	\$ (9,224)	-35%	\$ 1,327
Operating and Maintenance	\$ 47,602	\$ 50,731	\$ (3,129)	-6%	\$ 3,662
Taxes and Insurance	\$ 33,233	\$ 35,590	\$ (2,357)	-7%	\$ 2,556
Resident Services	\$ 2,500	\$ 2,500	\$ -	0%	\$ 192
<b>Total Operating Expenses</b>	<b>\$ 158,113</b>	<b>\$ 170,386</b>	<b>\$ (12,273)</b>	<b>-7%</b>	<b>\$ 12,163</b>
<b>Net Operating Income</b>	<b>\$ 165,520</b>	<b>\$ 149,564</b>	<b>\$ 15,956</b>	<b>11%</b>	<b>\$ 12,732</b>
<b>Replacement Reserves</b>	\$ 3,875	\$ 3,875			
<b>Debt Service</b>	\$ 34,788	\$ 34,788			
<b>Net Cash Flow</b>	<b>\$ 126,857</b>	<b>\$ 110,901</b>	<b>\$ 15,956</b>	<b>14%</b>	<b>\$ 9,758</b>
<b>Debt Service Coverage Ratio</b>	4.65	4.19			
Operating Expense PUPY	\$ 12,163	\$ 13,107			
Operating Expense PUPM	\$ 4,054	\$ 4,369			
Number of Units	52				
Months In YTD	3				

## Shinsei Gardens

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 123,040	\$ 111,142	\$ 11,898	11%	\$ 12,619
Subsidy Revenue	\$ 166,502	\$ 168,838	\$ (2,336)	-1%	\$ 17,077
Vacancy Loss	\$ (27,087)	\$ (6,449)	\$ (20,638)	320%	\$ (2,778)
Other Income	\$ 1,554	\$ 998	\$ 556	56%	\$ 159
<b>Total Operating Revenue</b>	<b>\$ 264,009</b>	<b>\$ 274,529</b>	<b>\$ (10,520)</b>	<b>-4%</b>	<b>\$ 27,078</b>
Administrative Expenses	\$ 50,791	\$ 41,896	\$ 8,895	21%	\$ 5,209
Utilities Expense	\$ 18,423	\$ 19,233	\$ (810)	-4%	\$ 1,890
Operating and Maintenance	\$ 41,562	\$ 40,770	\$ 792	2%	\$ 4,263
Taxes and Insurance	\$ 23,508	\$ 25,294	\$ (1,786)	-7%	\$ 2,411
Resident Services	\$ 7,857	\$ 9,322	\$ (1,465)	-16%	\$ 806
<b>Total Operating Expenses</b>	<b>\$ 142,141</b>	<b>\$ 136,515</b>	<b>\$ 5,626</b>	<b>4%</b>	<b>\$ 14,579</b>
<b>Net Operating Income</b>	<b>\$ 121,868</b>	<b>\$ 138,014</b>	<b>\$ (16,146)</b>	<b>-12%</b>	<b>\$ 12,499</b>
<b>Replacement Reserves</b>	\$ 5,850	\$ 5,850			
<b>Debt Service</b>	None	None			
<b>Net Cash Flow</b>	<b>\$ 116,018</b>	<b>\$ 132,164</b>	<b>\$ (16,146)</b>	<b>-12%</b>	<b>\$ 11,899</b>
<b>Debt Service Coverage Ratio</b>	None	None			
Operating Expense PUPY	\$ 14,579	\$ 14,002			
Operating Expense PUPM	\$ 4,860	\$ 4,667			
Number of Units	39				
Months In YTD	3				

## Park Alameda

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 133,278	\$ 141,415	\$ (8,137)	-6%	\$ 8,599
Subsidy Revenue	\$ 104,228	\$ 97,467	\$ 6,761	7%	\$ 6,724
Vacancy Loss	\$ (31,787)	\$ (12,333)	\$ (19,454)	158%	\$ (2,051)
Other Income	\$ 2,569	\$ 1,567	\$ 1,002	64%	\$ 166
<b>Total Operating Revenue</b>	<b>\$ 208,288</b>	<b>\$ 228,116</b>	<b>\$ (19,828)</b>	<b>-9%</b>	<b>\$ 13,438</b>
Administrative Expenses	\$ 58,111	\$ 60,706	\$ (2,595)	-4%	\$ 3,749
Utilities Expense	\$ 23,432	\$ 19,290	\$ 4,142	21%	\$ 1,512
Operating and Maintenance	\$ 44,510	\$ 42,941	\$ 1,569	4%	\$ 2,872
Taxes and Insurance	\$ 29,762	\$ 32,404	\$ (2,642)	-8%	\$ 1,920
Resident Services	\$ 16,424	\$ 18,421	\$ (1,997)	-11%	\$ 1,060
<b>Total Operating Expenses</b>	<b>\$ 172,239</b>	<b>\$ 173,762</b>	<b>\$ (1,523)</b>	<b>-1%</b>	<b>\$ 11,112</b>
<b>Net Operating Income</b>	<b>\$ 36,049</b>	<b>\$ 54,354</b>	<b>\$ (18,305)</b>	<b>-34%</b>	<b>\$ 2,326</b>
<b>Replacement Reserves</b>	\$ 7,983	\$ 7,983			
<b>Debt Service</b>	None	None			
<b>Net Cash Flow</b>	<b>\$ 28,067</b>	<b>\$ 46,372</b>	<b>\$ (18,305)</b>	<b>-39%</b>	<b>\$ 1,811</b>
<b>Debt Service Coverage Ratio</b>	None	None			
Operating Expense PUPY	\$ 11,112	\$ 11,210			
Operating Expense PUPM	\$ 3,704	\$ 3,737			
Number of Units	62				
Months In YTD	3				

## Stargell Commons

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 108,594	\$ 121,658	\$ (13,064)	-11%	\$ 13,574
Subsidy Revenue	\$ 56,433	\$ 52,011	\$ 4,422	9%	\$ 7,054
Vacancy Loss	\$ (9,339)	\$ (4,662)	\$ (4,677)	100%	\$ (1,167)
Other Income	\$ 1,651	\$ 1,250	\$ 401	32%	\$ 206
<b>Total Operating Revenue</b>	<b>\$ 157,339</b>	<b>\$ 170,257</b>	<b>\$ (12,918)</b>	<b>-8%</b>	<b>\$ 19,667</b>
Administrative Expenses	\$ 42,749	\$ 37,439	\$ 5,310	14%	\$ 5,344
Utilities Expense	\$ 14,669	\$ 14,968	\$ (299)	-2%	\$ 1,834
Operating and Maintenance	\$ 31,296	\$ 28,545	\$ 2,751	10%	\$ 3,912
Taxes and Insurance	\$ 19,930	\$ 24,253	\$ (4,323)	-18%	\$ 2,491
Resident Services	\$ 9,596	\$ 11,164	\$ (1,568)	-14%	\$ 1,200
<b>Total Operating Expenses</b>	<b>\$ 118,240</b>	<b>\$ 116,369</b>	<b>\$ 1,871</b>	<b>2%</b>	<b>\$ 14,780</b>
<b>Net Operating Income</b>	<b>\$ 39,099</b>	<b>\$ 53,888</b>	<b>\$ (14,789)</b>	<b>-27%</b>	<b>\$ 4,887</b>
<b>Replacement Reserves</b>	\$ 4,800	\$ 4,800			
<b>Debt Service</b>	\$ 17,289	\$ 17,289			
<b>Net Cash Flow</b>	<b>\$ 17,010</b>	<b>\$ 31,799</b>	<b>\$ (14,789)</b>	<b>-47%</b>	<b>\$ 2,126</b>
<b>Debt Service Coverage Ratio</b>	1.98	2.84			
Operating Expense PUPY	\$ 14,780	\$ 14,546			
Operating Expense PUPM	\$ 4,927	\$ 4,849			
Number of Units	32				
Months In YTD	3				



## Jack Capon Villas

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 26,124	\$ 26,757	\$ (633)	-2%	\$ 5,500
Subsidy Revenue	\$ 106,076	\$ 103,798	\$ 2,278	2%	\$ 22,332
Vacancy Loss	\$ -	\$ (3,917)	\$ 3,917	-100%	\$ -
Other Income	\$ 4,202	\$ 606	\$ 3,596	593%	\$ 885
<b>Total Operating Revenue</b>	<b>\$ 136,402</b>	<b>\$ 127,244</b>	<b>\$ 9,158</b>	<b>7%</b>	<b>\$ 28,716</b>
Administrative Expenses	\$ 32,361	\$ 26,970	\$ 5,391	20%	\$ 6,813
Utilities Expense	\$ 6,777	\$ 8,061	\$ (1,284)	-16%	\$ 1,427
Operating and Maintenance	\$ 36,309	\$ 46,989	\$ (10,680)	-23%	\$ 7,644
Taxes and Insurance	\$ 10,755	\$ 11,465	\$ (710)	-6%	\$ 2,264
Resident Services	\$ 16,704	\$ 16,704	\$ -	0%	\$ 3,517
<b>Total Operating Expenses</b>	<b>\$ 102,906</b>	<b>\$ 110,189</b>	<b>\$ (7,283)</b>	<b>-7%</b>	<b>\$ 21,664</b>
<b>Net Operating Income</b>	<b>\$ 33,496</b>	<b>\$ 17,055</b>	<b>\$ 16,441</b>	<b>96%</b>	<b>\$ 7,052</b>
<b>Replacement Reserves</b>	\$ 2,850	\$ 2,850			
<b>Debt Service</b>	\$ 7,158	\$ 7,158			
<b>Net Cash Flow</b>	<b>\$ 23,488</b>	<b>\$ 7,047</b>	<b>\$ 16,441</b>	<b>233%</b>	<b>\$ 4,945</b>
<b>Debt Service Coverage Ratio</b>	4.28	1.98			
Operating Expense PUPY	\$ 21,664	\$ 23,198			
Operating Expense PUPM	\$ 7,221	\$ 7,733			
Number of Units	19				
Months In YTD	3				

## Littlejohn Commons

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 43,552	\$ 68,844	\$ (25,292)	-37%	\$ 5,620
Subsidy Revenue	\$ 172,598	\$ 154,191	\$ 18,407	12%	\$ 22,271
Vacancy Loss	\$ (1,040)	\$ (11,151)	\$ 10,111	-91%	\$ (134)
Other Gain/Loss	\$ (565)	\$ (6,131)	\$ 5,566	-91%	\$ (73)
Other Income	\$ (4,688)	\$ (3,994)	\$ (694)	17%	\$ (605)
<b>Total Operating Revenue</b>	<b>\$ 209,857</b>	<b>\$ 201,759</b>	<b>\$ 8,098</b>	<b>4%</b>	<b>\$ 27,078</b>
Administrative Expenses	\$ 27,011	\$ 32,049	\$ (5,038)	-16%	\$ 3,485
Utilities Expense	\$ 10,284	\$ 14,507	\$ (4,223)	-29%	\$ 1,327
Operating and Maintenance	\$ 36,223	\$ 23,238	\$ 12,985	56%	\$ 4,674
Taxes and Insurance	\$ 24,417	\$ 19,346	\$ 5,071	26%	\$ 3,151
Resident Services	\$ 3,584	\$ 5,612	\$ (2,028)	-36%	\$ 462
<b>Total Operating Expenses</b>	<b>\$ 101,519</b>	<b>\$ 94,752</b>	<b>\$ 6,767</b>	<b>7%</b>	<b>\$ 13,099</b>
<b>Net Operating Income</b>	<b>\$ 108,338</b>	<b>\$ 107,007</b>	<b>\$ 1,331</b>	<b>1%</b>	<b>\$ 13,979</b>
<b>Replacement Reserves</b>	\$ 3,875	\$ 3,875			
<b>Debt Service</b>	\$ 59,127	\$ 59,127			
<b>Net Cash Flow</b>	<b>\$ 45,336</b>	<b>\$ 44,005</b>	<b>\$ 1,331</b>	<b>3%</b>	<b>\$ 5,850</b>
<b>Debt Service Coverage Ratio</b>	1.77	1.74			
Operating Expense PUPY	\$ 13,099	\$ 12,226			
Operating Expense PUPM	\$ 4,366	\$ 4,075			
Number of Units	31				
Months In YTD	3				

## Everett Commons

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 47,753	\$ 52,044	\$ (4,291)	-8%	\$ 9,551
Subsidy Revenue	\$ 100,471	\$ 127,083	\$ (26,612)	-21%	\$ 20,094
Vacancy Loss	\$ (26,149)	\$ (4,478)	\$ (21,671)	484%	\$ (5,230)
Other Gain/Loss	\$ 11,447	\$ (10,062)	\$ 21,509	NA	\$ 2,289
Other Income	\$ (17,652)	\$ (4,508)	\$ (13,144)	292%	\$ (3,530)
<b>Total Operating Revenue</b>	<b>\$ 115,870</b>	<b>\$ 160,079</b>	<b>\$ (44,209)</b>	<b>-28%</b>	<b>\$ 23,174</b>
Administrative Expenses	\$ 8,516	\$ 20,528	\$ (12,012)	-59%	\$ 1,703
Utilities Expense	\$ (3,530)	\$ 14,379	\$ (17,909)	-125%	\$ (706)
Operating and Maintenance	\$ 28,566	\$ 16,399	\$ 12,167	74%	\$ 5,713
Taxes and Insurance	\$ 13,805	\$ 16,500	\$ (2,695)	-16%	\$ 2,761
Resident Services	\$ 12,634	\$ 12,872	\$ (238)	-2%	\$ 2,527
<b>Total Operating Expenses</b>	<b>\$ 59,991</b>	<b>\$ 80,678</b>	<b>\$ (20,687)</b>	<b>-26%</b>	<b>\$ 11,998</b>
<b>Net Operating Income</b>	<b>\$ 55,879</b>	<b>\$ 79,401</b>	<b>\$ (23,522)</b>	<b>-30%</b>	<b>\$ 11,176</b>
<b>Replacement Reserves</b>	\$ 3,377	\$ 3,377			
<b>Debt Service</b>	\$ 53,979	\$ 53,979			
<b>Net Cash Flow</b>	<b>\$ (1,477)</b>	<b>\$ 22,045</b>	<b>\$ (23,522)</b>	<b>-107%</b>	<b>\$ (295)</b>
<b>Debt Service Coverage Ratio</b>	0.97	1.41			
Operating Expense PUPY	\$ 11,998	\$ 16,136			
Operating Expense PUPM	\$ 3,999	\$ 5,379			
Number of Units	20				
Months In YTD	3				

## Rosefield Village

	Actual	Budget	Actual-Budget (\$)	Actual-Budget (%)	PUPY
Rental Revenue	\$ 194,166	\$ 348,959	\$ (154,793)	-44%	\$ 8,442
Subsidy Revenue	\$ 239,652	\$ 217,981	\$ 21,671	10%	\$ 10,420
Vacancy Loss	\$ (36,750)	\$ (17,008)	\$ (19,742)	116%	\$ (1,598)
Other Gain/Loss	\$ 130,928	\$ 7,388	\$ 123,540	NA	\$ 5,693
Other Income	\$ 40,024	\$ (16,122)	\$ 56,146	-348%	\$ 1,740
<b>Total Operating Revenue</b>	<b>\$ 568,020</b>	<b>\$ 541,198</b>	<b>\$ 26,822</b>	<b>5%</b>	<b>\$ 24,697</b>
Administrative Expenses	\$ 71,197	\$ 68,594	\$ 2,603	4%	\$ 3,096
Utilities Expense	\$ 43,642	\$ 51,913	\$ (8,271)	-16%	\$ 1,897
Operating and Maintenance	\$ 57,346	\$ 46,558	\$ 10,788	23%	\$ 2,493
Taxes and Insurance	\$ 53,988	\$ 44,771	\$ 9,217	21%	\$ 2,347
Resident Services	\$ 19,241	\$ 21,490	\$ (2,249)	-10%	\$ 837
<b>Total Operating Expenses</b>	<b>\$ 245,414</b>	<b>\$ 233,326</b>	<b>\$ 12,088</b>	<b>5%</b>	<b>\$ 10,670</b>
<b>Net Operating Income</b>	<b>\$ 322,606</b>	<b>\$ 307,872</b>	<b>\$ 14,734</b>	<b>5%</b>	<b>\$ 14,026</b>
<b>Replacement Reserves</b>	\$ 13,800	\$ 13,800			
<b>Debt Service</b>	\$ 153,339	\$ 153,339			
<b>Net Cash Flow</b>	<b>\$ 155,467</b>	<b>\$ 140,733</b>	<b>\$ 14,734</b>	<b>10%</b>	<b>\$ 6,759</b>
<b>Debt Service Coverage Ratio</b>	2.01	1.92			
Operating Expense PUPY	\$ 10,670	\$ 10,145			
Operating Expense PUPM	\$ 3,557	\$ 3,382			
Number of Units	92				
Months In YTD	3				



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Radha Mehta, Management Analyst

Date: June 18, 2025

Re: Authorize the Executive Director or Designee to sign an amendment with AppleOne, Inc. for temporary staffing services to increase the budget by \$150,000 in an amount not to exceed \$350,000 and extend services for one additional year.

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### **BACKGROUND**

In July 2023, an RFP was issued for temporary agency support services and 15 temporary staffing firms submitted proposals. After the evaluation process, four firms were awarded agreements; Tryfacta Inc., COGENT Infotech, Protiviti, and AppleOne, Inc. (AppleOne). AppleOne was awarded a contract in the amount of \$200,000 for a three-year period, ending February 28, 2027, with an option to extend for two additional one-year periods. Staff is requesting an increase to the agreement in the amount of \$150,000 and a contract extension by one additional year.

### **DISCUSSION**

The Housing Authority of the City of Alameda (AHA) has been working with AppleOne for temporary staffing services and payroll for the temporary staffing and summer internships. AppleOne has provided staffing and recruiting services for AHA since 2019. Since the start of the agreement on March 1, 2024, expenditures on these services have totaled approximately \$128,927. The temporary services billing includes both administrative fees paid to the agency and the actual wages paid to the temporary staff. These services are provided on a contingent basis, and only paid if a candidate is selected for temporary staffing. Because of the amount of the contract, Board authorization to proceed is being requested.

Below are the rates for services provided by AppleOne:

<b>Job Title / Department</b>	<b>Bill Rate/Hour</b>
Executive Assistant / Administration	\$ 53.79 - \$67.94





Housing or Program (Administrative) Assistant / Any Department	\$ 45.82 - \$48.98
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Accounting Officer / Finance	\$ 63.57 - \$71.10
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Accounting Specialist / Finance	\$ 55.42 - \$58.14
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Housing Specialist II / Housing Programs	\$ 61.94 - \$63.20
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Housing Specialist I / Housing Programs	\$ 55.42 - \$58.46
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**Price Escalations**

Year 2 Price Escalation from Year 1	0.75%
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Year 3 Price Escalation from Year 2	0.75%
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Year 4 Price Escalation from Year 3	0.75%
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Year 5 Price Escalation from Year 4	0.75%
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**FISCAL IMPACT**

Temporary and recruiting services have been budgeted for this fiscal year. There is also salary savings available resulting from staff unpaid leave.

**CEQA**

N/A

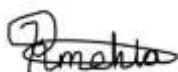
**RECOMMENDATION**

Authorize the Executive Director or Designee to sign an amendment with AppleOne, Inc. for temporary staffing services to increase the budget by \$150,000 in an amount not to exceed \$350,000 and extend services for one additional year.

**ATTACHMENTS**

1. AppleOne- Amendment No. 1 (Signed)

Respectfully submitted,



Radha Mehta, Management Analyst

**FIRST AMENDMENT TO AGREEMENT**

This Amendment of the Agreement, entered into this 19th of June, 2025, by and between the HOUSING AUTHORITY OF THE CITY OF ALAMEDA, a public body corporate and politic (hereinafter referred to as "AHA") and APPLEONE, INC. (a California Corporation) whose address is 327 W. BROADWAY GLENDALE, CA 91204, (hereinafter referred to as "CONTRACTOR") is made with reference to the following:

**RECITALS:**

- A. On March 1, 2024, an agreement was entered into by and between AHA and Contractor (hereinafter "Agreement") with a term date of February 28, 2027 and a not to exceed amount of \$200,000.
- B. AHA and Contractor desire to modify the Agreement on the terms and conditions set forth herein.

NOW, THEREFORE, it is mutually agreed by and between and undersigned parties as follows:

- 1. The not to exceed amount for the entire Agreement shall be increased by Hundred Fifty Thousand Dollars (\$150,000) to be amended to a not to exceed amount of Three Hundred Fifty Thousand dollars (\$350,000) for services.
- 2. The contract period is extended until February 28, 2028
- 3. Except as expressly modified herein, all other terms and covenants set forth in the Agreement shall remain the same and shall be in full force and effect.

IN WITNESS WHEREOF, the parties hereto have caused this modification of the Agreement to be executed on the day and year first above written.

APPLEONE, INC.

HOUSING AUTHORITY OF THE CITY OF  
ALAMEDA

DocuSigned by:  
*Brett W. Howroyd*

Brett W. Howroyd  
President

Alicia Southern  
Director of Human Resources

Vanessa Cooper  
Executive Director



**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Trevor Jones, Asset Manager

Date: June 18, 2025

Re: Approve Agreement between Eagle and Everett Limited Partnership and Its Electric.

---

## **BACKGROUND**

The State of California, particularly the CA Energy Commission (CEC) and other programs, are providing grants and rebate opportunities with priority for equity priority locations in alignment with the federal government's Justice40 initiative, which seeks to invest, at a minimum, 40% of funds towards historically disadvantaged communities. Other grant programs focus on Multi-Unit Development (MUD) hot spots. Communities in limited resource areas or low EnviroScreen tracts have less opportunity to access charging easily and may face cost barriers to charging an electric vehicle (EV) car. California is continuing to forward its no-emissions goals. Electric vehicles are one of the top markets being focused on. The State's Zero Emission Goals are 1.5 million EV cars on the road by 2025, 3 million by 2030, and 100% zero-emission cars by 2035. In order to make these goals a reality, the State is investing in increasing ownership and providing charging stations for those who use EV cars. These grants range from addressing the direct needs of current EV owners and the future demand for charging stations as EV ownership increases throughout the state.

The Housing Authority of the City of Alameda (AHA) is seeking to increase the accessibility of electric vehicle ownership and charging to its residents. Equity is the main focus of AHA's involvement in establishing charging stations. By participating in these programs, AHA is aligning its mission with state goals by providing direct benefits and opportunities for its residents, participants, and community, who have disproportionately and historically been exposed to persistent environmental, health, and other social burdens. This project will increase access to clean transportation and mobility options along with opportunities to transform behaviors and systems that may be harming the community's quality of life. The programs available to AHA incorporate community engagement, partnerships, and cross-agency collaboration, keeping equity as the core value of project implementation. AHA is working with multiple vendors and the City of Alameda to explore options that would not burden residents with high charging costs and simultaneously avoid undue burden on property operating budgets



once installed.

In early 2024, the City of Alameda reached out to partner with AHA on the Public EV Charging Provider Request For Proposal (RFP) by adding properties from the Alameda Affordable Housing Corporation's (AAHC) portfolio as part of the scope. The properties selected were within neighborhoods identified as charging deserts by the City of Alameda. The RFP aims to provide the public with EV chargers located within a quarter mile of all residents and within one-tenth of a mile of Multi-Unit Development (MUD) hot spots. AHA, as a partner with the City on this Proposal, supplied feedback and review of AAHC sites that would be most feasible and provided Everett Commons and Rosefield Village as potential properties.

AHA staff worked with Alameda Municipal Power (AMP) to review AAHC portfolio properties that may be applicable to the EV charger installation rebate program.

Implementing the installation of chargers at AAHC's multifamily sites provides new opportunities for residents to charge at or closer to home, improves air quality, increases vehicle and mobility awareness, affordability, and access. The installation of chargers may also reduce barriers, such as financing, that a resident may have when obtaining an EV vehicle. While equity for residents is the key driver of this project, AHA also works to increase its use of green practices across all levels of services it provides. Implementing EV charging reduces the carbon footprint of the properties' non-source point pollution while providing active benefits to tenants.

## **DISCUSSION**

The City of Alameda received a grant from the State and chose ItsElectric via their procurement processes for the Public EV Charging Provider RFP. In early 2024, they partnered with AHA to include a list of the priority properties they would be interested in adding to the RFP scope. These properties were identified by the City as located in charging deserts. AHA reviewed the property lists and conducted site visits with ItsElectric to identify properties with feasible EV charging destinations. Everett Commons met the requirements for installing street-side EV charging, including the electric meter being less than 100 feet from the charger location, street-side parking, and sidewalk infrastructure to place the podium on (see attached Site Map). Everett Commons would provide the electricity and meter housing to power the stations. AHA would not pay out-of-pocket for the costs of this project and the property could potentially receive nominal profits from this model.

Staff have reviewed the attached Licensing Agreement between ItsElectric and Eagle and Everett Limited Partnership and are in agreement with the terms, as have our investors and lenders. The Provider (ItsElectric) desires to install, operate, and maintain two EV charging stations for use by the general public. The term of the Agreement is two years with an option to extend the Agreement for up to an additional three years. The Provider is solely responsible for all costs associated with providing equipment and services, installation, and the repair and removal of the EV Charging Stations.

The revenue share is usage-dependent and set at a fixed rate of \$0.06 per kilowatt. The electrical usage costs incurred by the EV Charging Stations are tracked by the Provider and paid back directly to the property for reimbursement.

**FISCAL IMPACT**

There will be nominal shared revenue with the property.

**CEQA**

Not applicable.

**RECOMMENDATION**

Accept the proposal by ItsElectric to install EV Charging at Everett Commons.

**ATTACHMENTS**

1. ItsElectric Presentation 2.0
2. AHA\_ Agreement - EV Charging Stations(1010191.6)\_for signature

Respectfully submitted,  
Trevor Jones  
Trevor Jones, Asset Manager



# ItsElectric Charging at Everett Commons

REVIEW OF PROPOSED LOCATION AND AGREEMENT



Island City Development

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## Purpose

Equity – residents may not have access to chargers in Multifamily areas.

- Increase vehicle and transportation accessibility
- Reduce emissions creating cleaner air
- Address barriers to EV ownership

California moves to its no emissions goal of 1.5 M EV cars on the road by 2025 and 3M by 2030 and 100% zero emission cars by 2035.

EV charging programs provide opportunities for rebates on installation or partnerships that provide minimal costs to AHA and serve its participants.



Island City Development

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# Timeline

Year	Month	Action
2024	February	The City of Alameda (COA) requested AHA's review of their Public Electric Vehicle (EV) Charging Provider RFP, inviting AHA to be a partner for charging sites. (ItsElectric)
2024	April	AHA was selected for the AMP multifamily feasibility study and provided Independence Plaza as the study site. (CLEAResult and EvCharge4u)
2024	August	Site visits to Eagle Village, Rosefield Village, and Everett Commons were conducted for COA and ItsElectric.
2024	November	AHA reviewed contracts and agreements between ItsElectric, AHA, and the City.
2024	December	AHA Legal reviewed the contract and provided proposed changes to ItsElectric.
2025	January	ItsElectric contract is sent to Enterprise for review and approval.
2025	June	The project is formally presented to the Board for Approval.
2025	July	Installation of the EV Charging Stations.



Island City Development

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## COA & ItsElectric Public Charging Provider

This program is at no cost to Everett Commons to implement and will be handled mainly between the City of Alameda and ItsElectric.

ItsElectric will install charging stations for street parking and manage operation of the systems.

AHA is providing access and use of space on properties for meter housing and charging station infrastructure.



Island City Development

4

## Charging Location



Island City Development

5

## ItsElectric

Type of ownership	# of ports	Cost
Own EV Charger (incentive)	2	\$0
Annual Ops. & Maint.	2	\$0

Property involved: Everett Commons

Serves public and residents

Trenching and installation of two charging stations along sidewalk parking areas.

Separate meter installation for chargers. (1 port/ charger)

AHA may receive nominal profits.



Island City Development

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# Recommendation

Accept the proposal by ItsElectric to install EV Charging at Everett Commons.

Next Steps: Everett and Eagle Limited Partnership will sign the Agreement with ItsElectric and begin installation in the third quarter of 2025.



Island City Development

## EV CHARGER HOST SITE LICENSE AGREEMENT

This **EV CHARGER HOST SITE LICENSE AGREEMENT** (“Agreement”) is made and entered by and between It’s Electric Inc., a Delaware C Corp. with principal offices located at Newlab - itselectric, Brooklyn Navy Yard, Building 128, 19 Morris Ave, Brooklyn, NY 11205 (“Provider”), and the Everett and Eagle LP, with principal offices at 701 Atlantic Avenue, Alameda, CA 94501 (“Host”). Provider and Host are sometimes hereinafter referred to individually as a “Party” and collectively as “Parties”.

### RECITALS

- A. Host is the owner of certain properties in fee and/or easement interest as identified in Section 3(b) below (collectively “Property”).
- B. Provider desires to install, operate, and maintain one or more electric vehicle (“EV”) charging stations for use by the general public (“Users”) on the Property.
- C. Provider and Host now desire to set forth the terms and conditions for placement of the charging stations by Provider on the Property.

**NOW THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:**

- (a) Section 1.     Incorporation of Recitals.
- (b) The foregoing Recitals are incorporated herein by reference.
- (c) Section 2.     Effective Date and Term; Option to Extend.

This Agreement shall be effective on the date that both Parties have executed the Agreement (the “Effective Date”). The term of this Agreement begins on the Effective Date and continues for a period of two (2) years, unless terminated as provided herein. Host shall have the option to extend the term of the Agreement for up to an additional three (3) years subject to ninety (90) days written notice to Provider prior to the expiration of the initial two (2) year term of the Agreement.

### Section 3.     License.

- (a) Host represents and warrants that it is the owner of the Property or that it holds a lease or option to renew the lease for the Property of equal or greater length than the term of this Agreement, and that Host has all the rights to control the uses of the Property and no encumbrances that would interfere with Host’s ability to control and to determine the uses of the Property.
- (b) For the term of this Agreement, Host hereby grants to Provider an exclusive, revocable license to install, construct, operate, maintain and, as required herein, remove one or more EV Charging Stations EV charging stations on the Property legally described in Exhibit “A” and depicted in Exhibit “B”, each of which are attached hereto and incorporated herein by reference (“Site Location”), subject to compliance with all of the terms and conditions of this Agreement.

#### Section 4. Provider Access to Property.

- (a) Host hereby grants Provider, its agents and representatives the right to access the Site Location for the purpose of installing, inspecting, replacing, repairing, maintaining and upgrading each EV Charging Station at any reasonable time if Provider gives Host notice a minimum of 48 hours before such visit, and at all times between the hours of 8:00AM and 6:00PM local time.
- (b) In the event of termination or expiration of this Agreement, Provider and its representatives shall retain the right to access the Property in order to remove any EV Charging Station, in accordance with Section 9 below, and subject to the notice requirements set forth in Section 17.

#### Section 5. Installation and Construction of EV Charging Stations on the Property.

- (a) Provider shall furnish all equipment for, construct and maintain the EV charging stations in accordance with applicable laws and regulations at the Provider's sole cost, risk, and responsibility.
- (b) In furtherance hereof, Provider shall furnish and install Electric Vehicle charging stations that may consist of:
  - (1) Two (2) UL-certified, Level-2, 32 amp electric vehicle chargers ("EV Chargers") which are suitable for use at the curb along the Property's frontage in a publicly accessible exterior location and equipped with a cellular data connection that reports all EV Charger usage data to the Provider's cloud-based customer management platform and also include electrical meters that track the rate and amount of electricity transferred to Users' EVs;
  - (2) Exterior charging bollards that are approximately 7" x 7" x 44" and will be mounted to the ground in an area adjacent to a dedicated parking space, whether owned by the Host or the local municipality; and
  - (3) Connection boxes that are a PVC weather-proof container, approximately 15" x 14" x 7", and will be mounted adjacent to the Property's main electrical panel or in another suitable location agreed to in writing by the Host and Provider.
- (c) EV charging stations are and will remain the property of Provider. Host shall not sell, lease, assign, retire, dispose of, remove or move EV Chargers during the term of this Agreement or as otherwise agreed to in writing by the Host and Provider.
- (d) Provider shall be solely responsible for all costs associated with the provision of equipment and services, installation, repair and removal of EV Charging Stations, including permitting and licensing fees, project management, and any associated costs. There are no costs to the Host except where any provision, installation, repair or removal costs directly arise out of or relate to any intentional or negligent acts by or reckless disregard of Host or its agents.
- (e) Provider has subcontracted with a third-party installer ("Installer") to supply and install the EV Charging Station on the Property. Final electrical connection of the EV Charging Station to power must be performed by Installer. Other installation work prior to the final electrical



connection of the EV Charging Station to power may be performed by Installer or Provider in collaboration with the Installer.

(f) Provider shall be responsible for:

- (1) submitting a work plan to Host for review and comment no later than two weeks prior to installation;
- (2) obtaining and providing proof to Host of any and all necessary federal, state or municipal licenses, permits and/or approvals for the installation and operation of the EV Charging Stations at the Site Location;
- (3) preparing the Site Location for installation of each EV Charging Station, which may include (i) installation of conduit and wiring under turf or lawn, and (ii) concrete, lawn and asphalt repairs required for subgrade conduit installations;
- (4) the interconnection of each EV Charging Station with Host's electric service; and
- (5) Direct payment for any and all payments due and owing to Installer for services provided as described herein. Provider acknowledges, agrees, and understands that Host shall not have any obligation to make any payments to Installer pursuant to the terms of this Agreement and, further, shall not serve as a conduit for any payments by Provider to Installer.

(g) Host shall be responsible for:

- (1) providing approval for Provider's Installation work plan and any permitting applications required by local authorities within ten (10) business days of receiving such documents from Provider; and
- (2) cooperating and assisting, as reasonably requested by Provider, in obtaining all licenses, permits and approvals; except for any payments of money.

#### Section 6. Operation of EV Charging Stations.

(a) Provider shall be responsible for:

- (1) managing and maintaining the EV Charging Station;
- (2) providing customer service to Users, and arranging for repairs, software/firmware updates and maintenance;
- (3) managing User accounts and billing;
- (4) providing each EV Charging Station with cellular service and managing the cellular provider;
- (5) managing all fees, taxes, and costs associated with operating EV Charging Stations on Host's Property and providing service to Users; and

(6) providing marketing and outreach materials to Host so Host may provide to potential and/or existing Users.

(b) Host shall be responsible for:

(1) keeping the Site Location clean and maintaining the space surrounding each EV Charging Station in a safe, neat, and orderly condition in accordance with all applicable municipal and state laws; and

(2) ensuring all taxes, rents, mortgages, utilities and other payments are fully paid to ensure continuity of site control without encumbrances.

#### Section 7. Revenue Sharing and Utility Reimbursement.

(a) EV Charging Stations will generate proceeds, measured monthly, from Users who pay usage- and session-based fees for parking and charging (“Revenue”) at a rate established at the sole discretion of Provider.

(b) In exchange for operating EV Charging Stations at Host’s Property, Provider shall pay Host by the end of the following month:

(1) a share of Revenue (“Share”) at a fixed rate of \$0.06 per kilowatt hour; and

(2) electrical usage costs incurred by EV Charging Stations (“Reimbursement”) as tracked by the Provider’s cloud-based platform.

(c) Payments shall be made quarterly via electronic payment by Provider to Host. Host shall prescribe in writing (via e-mail or letter) to Provider any specific details as to procedure to submit payments, which procedures may be amended from time to time subject to forty-five (45) days prior written notice (via e-mail or letter).

#### Section 8. Repair and Maintenance to EV Charging Stations.

(a) Provider shall be responsible for and maintain the EV charging stations, the area around the EV Charging stations, and the Host Property so as to keep the equipment and area in a neat, clean, first-class condition and in good order.

(b) Provider shall be responsible for the costs associated with maintenance of the EV Charging stations, at the Host Property. In the event Provider does not maintain the EV Charging stations, and the Host Property as required herein, Host may terminate the Agreement as more particularly provided in Section 10 below.

(c) Provider shall be solely responsible for all necessary servicing and repair of EV Charging Stations, including a monthly inspection conducted by Provider or Provider’s designee. Provider shall provide copies of each monthly inspection to Host within five (5) business days of the inspection being conducted in accordance with the notice provisions of Section 17 below.

(d) In the event of EV Charging Station failure, damage, or other problem requiring repair, replacement, adjustment or maintenance, Host shall notify Provider or Provider's designee as soon as practicable upon becoming aware of such failure or problem, by email (support@itselectric.us) or phone (833-433-7033).

(e) Provider's servicing and repairs shall be completed within a commercially reasonable period based on the specific problem, but no later than ten (10) business days after Host notifies Provider.

(f) Host shall neither perform nor permit anyone without Provider's prior written approval to perform any service or repair work on any EV Charging Station.

(g) The Provider shall be responsible for addressing and resolving all customer complaints related to the usage of EV charging stations. This responsibility includes, but is not limited to, handling issues concerning:

1. Charger reliability and performance.
2. Malfunctioning or out-of-service chargers.
3. Inconsistent or fluctuating charging speeds.
4. Charging sessions that are unexpectedly cut short.
5. Payment-related issues, including payment declines and challenges with the payment system.
6. Maintenance problems affecting charger functionality.
7. Customer service and support for any charging-related concerns.

All complaints should be addressed by contacting the Provider via phone at (833-433-7033 )or by emailing support@itselectric.us.

#### Section 9. Removal of EV Charging Stations.

(a) Provider shall be solely responsible for removing EV Charging Stations and all associated equipment from Host's property at its own costs within ninety (90) days upon termination of the Agreement by either Party, expiration of the Agreement, or as mutually agreed upon in writing between the parties.

(b) Provider shall remove the EV charging stations and restore the Property to its former condition, at Provider's sole cost and expense. Pictures shall be taken by Provider prior to installation and following removal of the Property and provided to Host within three (3) business days of each to appropriately determine compliance with this section.

(c) In the event Provider fails to remove the EV charging stations and restore the Host Property within said time period, Host shall have the right to do so without notice. Provider shall immediately reimburse Host for all out of pocket expenses expended to remove the EV charging stations and restore the Property. Said amounts shall accrue interest from the date expended by Host at the lesser of ten percent (10%) per annum or the maximum non-usurious interest rate permitted by law.

Section 10. Termination of Agreement.

- (a) Either Party may terminate this Agreement with cause upon the occurrence of a breach by the other party, provided that such breach continues for thirty (30) days after the non-breaching Party gave written notice of such breach to the breaching Party.
- (b) Either Party may terminate this Agreement without cause subject to ninety (90) days' prior written notice to the other Party.
- (c) This Agreement establishes a license and does not require Host to provide a reason for termination. However, reasons for termination may include, but are not limited to, (i) Provider's failure to comply with the conditions of this Agreement; (ii) Provider's failure to maintain the EV Charging stations in accordance with this Agreement; (iii) the EV charging stations are determined to be a hazard to safety, health, or public welfare; (iv) the area dedicated to the EV charging stations is needed for another public purpose; or (v) any other cause, or no cause, and Host shall not be liable for any damage or expense to Provider resulting therefrom.
- (d) All amounts required to be paid pursuant to Section 7 above shall be made within ten (10) business days of the effective date of termination.

Section 11. Expiration of License.

The Agreement shall expire when Provider removes the EV charging stations and associated equipment from the Property and restore the Property to its former condition in accordance with Section 9 above.

Section 12. Indemnification.

- (a) To the fullest extent allowable by law, Provider shall hold harmless, defend at its own expense, and indemnify Host from and against any and all damages, liabilities, claims, losses, damages, or expenses, including reasonable attorney's fees, arising from all acts or omissions to act of Provider or its agents or employees in connection with Provider's performance of work or its failure to comply with any of its obligations contained in this Agreement, excluding, however, such liability, claims, losses, damages, or expenses arising from Host's sole negligence or willful acts.
- (b) Any damage alleged to be caused by Provider's facilities to a person, his/her property, and/or to his/her electric vehicle shall be the sole responsibility of Provider to address and resolve at no cost or expense to Host. It is the express intent of this Agreement that Host shall not be held responsible for any such damage and that Provider will hold harmless, defend at its own expense, and indemnify Host from and against any and all said damages.
- (c) These defense and indemnity obligations shall survive the termination or expiration of this Agreement and are in addition to, and not limited by, the Insurance obligations in this Agreement, for a maximum of four (4) years.

Section 13. Release.

Host shall bear no responsibility, or liability, for, and Provider agrees to hold the Host harmless from, any damage to the EV charging stations from any cause, including, but not limited to, damage resulting from the construction, maintenance, use, repair, or presence of Host facilities on Host's Property or removal of the EV charging stations. Any complaints or concerns from Users or others related to the EV charging stations shall be addressed solely by Provider.

#### Section 14. Relationship of the Parties.

The relationship between the parties is that of independent contractors and licensor/licensee. Nothing contained in this Agreement shall be construed as creating any agency, partnership, franchise, business opportunity, joint venture or other form of joint enterprise, employment or fiduciary relationship between the parties, and neither party shall have authority to contract for or bind the other party in any manner whatsoever.

#### Section 15. Insurance.

Provider agrees to provide Host with certificates of Commercial General Liability (CGL) insurance satisfactory to the Host. Certificates of liability insurance must be provided to Host annually. Provider must notify Host thirty (30) days prior to cancellation or change in said insurance.

(d) Commercial General Liability insurance at least as broad as Insurance Services Office (ISO) form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operations, with minimum limits of \$1 million per occurrence and \$2 million in the aggregate shall be maintained at all times during the term of this Agreement. These limits may be increased by the Host based on changes in the insurance marketplace.

(e) Housing Authority of the City of Alameda and its affiliate, Island City Development and its Subsidiaries, 2437 Eagle Avenue LLC, Host, and their departments, their respective directors, officers, officials, Boards of Commissioners, employees, agents, and volunteers are to be named as additional insureds for all liability arising out of work or operations performed by or on behalf of Provider including products sold and materials, parts, or equipment furnished in connection with such work or operations. An additional insured form ISO CG 20 12, or equivalent, is required. Provider shall provide additional insured form ISO CG 20 10 11 85, or form(s) at least as broad. Provider shall provide a Certificate of Insurance naming Host as additional insured; with the liability insurance limits of \$1 million for each occurrence and \$2 million in the aggregate.

(f) If Provider maintains broader coverage and/or higher limits than the minimums shown above, Host requires and shall be entitled to the broader coverage and/or higher limits maintained by Provider.

(g) The additional insured coverage under Provider's policies must be primary and non-contributory and will not seek contribution to any loss or claim from Host's insurance, or self-insurance, and shall be at least as broad as ISO CG 20 01 12 19.

(h) Provider hereby grants to Host a waiver of any right to subrogation which any insurer of Provider may acquire against Host by virtue of the payment of any loss under such insurance. Provider agrees to obtain any endorsement that may be necessary to affect this waiver of

subrogation, but this provision applies regardless of whether or not Host has received a waiver of subrogation endorsement from the insurer.

(i) Provider shall procure and maintain continuous coverage for the life of this Agreement against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work in this Agreement and the results of that work by Provider, its agents, employees, or subcontractors. Should any of the above insurance coverages be canceled or coverage reduced before the expiration date thereof, the insurer affording coverage shall provide thirty (30) days' advance written notice to Host. Should Provider fail to maintain insurance as required, Host may take such action as it deems necessary to protect its interests. Such action may include, but is not limited to, termination of this Agreement or other action as Host deems appropriate.

(j) All subcontractors employed by Provider shall be required to furnish proof of Commercial General Liability insurance with coverage at least as broad as required of Provider in Section 14 of this Agreement. Provider must verify that all subcontractors or other parties hired for work, services, or operations in connection with this Agreement have purchased and maintained such coverage and that all Parties to this Agreement are endorsed as additional insured. Host reserves the right to require Provider provide a certificate of insurance as proof of compliance and verification by the subcontractors upon request.

(k) Workers' Compensation, as required by the State of California, with Statutory Limits and Employers' Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease. This requirement does not apply to sole proprietors.

(l) Automobile Liability: ISO Form Number CA 00 01 coverage any auto (Code 1), or if Consultant has no owned autos, hired (Code 8) and non-owned autos (Code 9) with limit no less than \$1 million for bodily injury and property damage. This requirement does not apply if no motor vehicles are used in providing services under the contract.

#### Section 16. Damage to Host Property.

Provider assumes responsibility and liability for all damage to the Host Property caused by construction or maintenance of the Encroachment and shall reimburse Host for correction of any such damage. Upon failure of Provider to so reimburse Host, the costs incurred by Host in repairing any property shall be a debt of the Provider to Host, and recoverable by Host in any manner provided by law. Moreover, Provider acknowledges that Host may record and enforce a lien upon Provider's Property in order to recover such costs.

#### Section 17. Notices.

Each party shall deliver all notices hereunder in writing and shall deliver them by email, personal delivery, or certified registered mail, first class postage fully prepaid, return receipt requested, addressed to Provider and Host at their respective addresses as listed below. Any party may change its email contact address or postal address for notice in accordance with the terms of this section.

#### Provider



Nathan King  
[nathan@itselectric.us](mailto:nathan@itselectric.us)  
Newlab – itselectric  
Brooklyn Navy Yard, Building 128  
19 Morris Ave.  
Brooklyn, NY 11205

Host

Everett and Eagle LP  
701 Atlantic Avenue  
Alameda, CA 94501

Section 18. Attorneys' Fees.

In any action between the Parties hereto seeking enforcement of this Agreement, or in connection with the License or the Permit, the prevailing Party in such action shall be entitled to have and to recover from the other Party its reasonable attorneys' fees and other reasonable expenses in connection with such action or proceeding in addition to its recoverable court costs.

Section 19. Amendment or Modification.

This Agreement may not be modified or amended except by written agreement executed by the then-owner of the Provider's Property and the Host Property and recorded in the Office of the County Recorder, County of Los Angeles, California.

Section 20. Governing Law.

This Agreement shall be governed by and construed in accordance with the laws of the State of California and any legal action shall be brought in a court of competent jurisdiction in Alameda County.

Section 21. Confidentiality.

This Agreement shall be confidential unless disclosure is required by law.

Section 22. Assignment.

The rights under this Agreement shall not be assigned or transferred without the written consent of Host. Any such purported assignment or transfer without Host's written consent shall be void and of no effect.

Section 23. Waiver.

a. No waiver of any term or right in this Agreement shall be effective unless in writing, signed by an authorized representative of the waiving Party. The failure of either Party to enforce any

provision of this Agreement shall not be construed as a waiver or modification of such provision, or impairment of its right to enforce such provision thereafter.

Section 24. Authority to Bind.

b. Each of the Parties represents, warrants and agrees that any person executing this Agreement on its behalf has the full right and authority to enter this Agreement on behalf of that Party.

Section 25. Severability.

The invalidity or unenforceability of any provision of this Agreement with respect to a particular Party or set of circumstances shall not in any way affect the validity and enforceability of any other provision hereof or the same provision when applied to another Party or to a different set of circumstances.

c. Section 26. Entire Agreement.

The undersigned declares and represents that no promise, inducement, or agreement not herein expressed, has been made to the undersigned and that this Agreement contains the entire agreement between the Parties hereto and that the terms of this Agreement are contractual and not a mere recital.

Section 27. Incorporation of Exhibit(s).

Exhibit “A” and Exhibit “B” attached hereto are incorporated herein by reference.

Section 28. Counterparts and Electronic Signatures.

This Agreement may be executed in multiple counterparts, each of which shall be considered an original but all of which shall constitute one agreement. The Parties also hereby consent to the use of electronic and digital signatures.

**[SIGNATURES ON FOLLOWING PAGE]**

**IN WITNESS WHEREOF, the Parties have executed this Agreement as of the date this Agreement is signed by both Parties.**

**“HOST”**

**EVERETT AND EAGLE L.P.,  
A California Limited Partnership**

**By: 2437 Eagle Avenue, LLC,  
A California limited liability company,  
Its managing general partner**

**By: Island City Development,  
A California nonprofit public benefit corporation, its Manager and Sole Member**

Signature: \_\_\_\_\_

Vanessa Cooper  
Everett and Eagle L.P.’s representative

Date: \_\_\_\_\_

**ATTEST:**

\_\_\_\_\_  
\_\_\_\_\_, \_\_\_\_\_

**APPROVED AS TO FORM:**

**ALESHIRE & WYNDER, LLP**

\_\_\_\_\_  
Adrian R. Guerra, Special Counsel

**“PROVIDER”**

**IT’S ELECTRIC INC.**

Signature: \_\_\_\_\_

  
Nathan King  
Chief Executive Officer

Date: May 1, 2025

**EXHIBIT A**  
**LEGAL DESCRIPTION OF OWNER'S PROPERTY**

**Legal Description**

Real property in the City of Alameda, County of Alameda, State of California, described as follows:

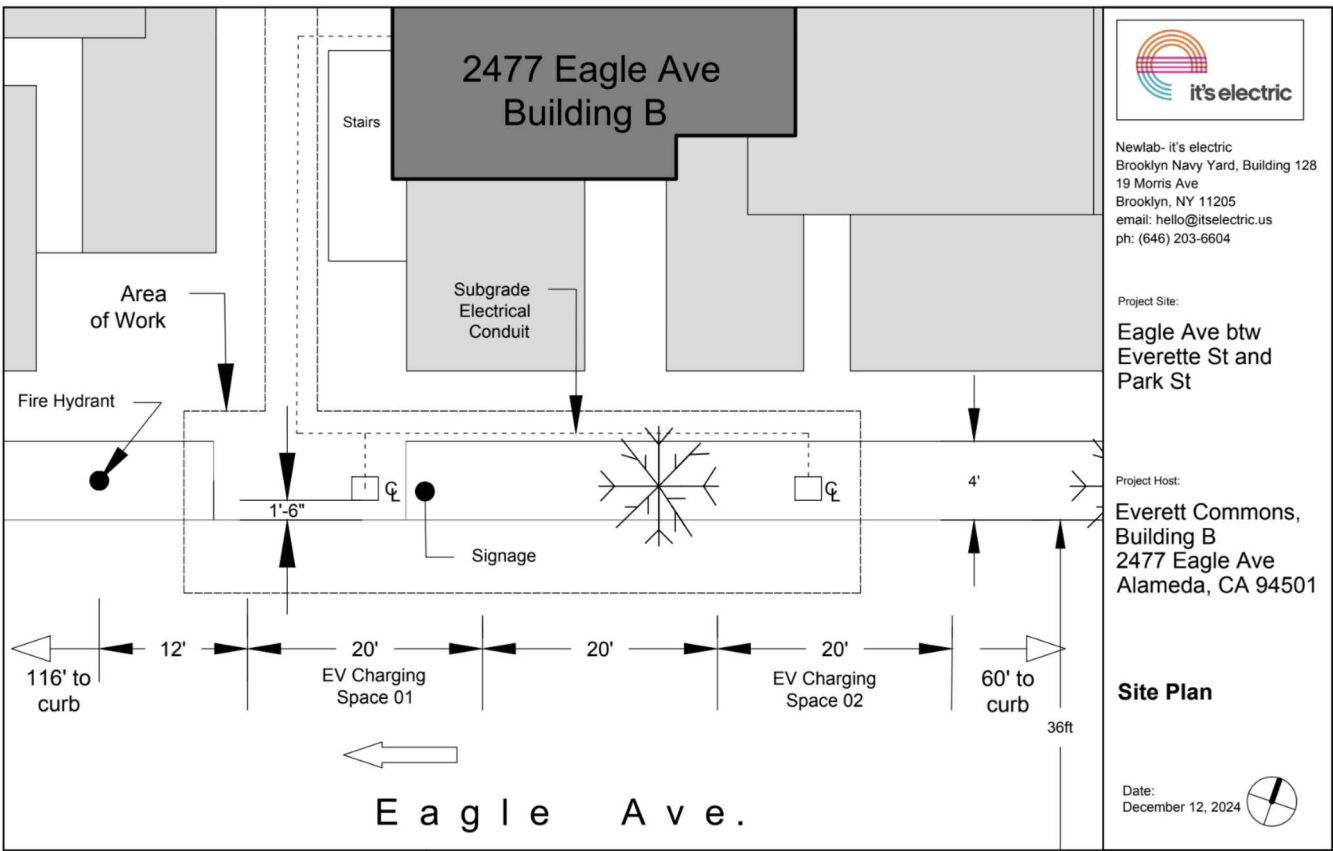
ALL OF LOTS 13, 15, 17, 18 AND 19 IN BLOCK F, AS SAID LOTS AND BLOCK ARE SHOWN ON THE MAP OF ALAMEDA STATION HOMESTEAD TRACT, FILED MARCH 14, 1868 IN BOOK 17 OF MAPS, PAGE 60, ALAMEDA COUNTY RECORDS.

Also described as follows:

BEGINNING AT THE SOUTH CORNER OF SAID LOT 17; THENCE ALONG THE SOUTHWESTERLY LINE OF SAID LOTS 17, 15 AND 13 NORTH 55°37'07" WEST 240.07 FEET TO THE WEST CORNER OF SAID LOT 13; THENCE ALONG THE NORTHWESTERLY LINE OF SAID LOT 13 NORTH 34°21'13" EAST 150.07 FEET TO THE NORTH CORNER OF SAID LOT 13; THENCE ALONG THE NORTHEASTERLY LINE OF SAID LOTS 13, 15 AND 19 SOUTH 55°38'29" EAST 240.04 FEET TO THE EAST CORNER OF SAID LOT 19; THENCE ALONG THE SOUTHEASTERLY LINE OF SAID LOTS 19, 18 AND 17 SOUTH 34°20'40" WEST 150.17 FEET TO THE POINT OF BEGINNING.

APN: 070-0193-011

SITE MAP





**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Nancy Gerardin, Director of Property Operations

Date: June 18, 2025

Re: Approve property budgets for the Housing Authority of the City of Alameda owned properties for July 1, 2025 - June 30, 2026.

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### **BACKGROUND**

The role of the Property Operations and Asset Management departments at the Housing Authority of the City of Alameda is to ensure compliance with applicable regulatory agreements and underwritten financial performance.

In collaboration with FPI Management, a third-party property management company, Property Operations and Asset Management have prepared and now submit the annual operating budget for the following non-LIHTC (Low-Income Housing Tax Credit) properties: Parrot Gardens (8 units) and Scattered Sites (Condos - 7 units, Mulberry Town Homes - 4 units, Paru House - 1 unit, Lincoln House - 4 units, and Sherman House 9 units). The total number of units is 33.

### **DISCUSSION**

The operating budget is a projection of the upcoming fiscal year's operating revenue and expenses, including administrative, marketing, utilities, operating and maintenance, taxes and insurance, and resident services. The budget also includes other required financial expenses, such as the monthly debt service payments and replacement reserve deposits for projecting the amount of cash flow available for distribution where applicable. The Property Operations, Asset Management, and Finance departments have reviewed and now submit the Fiscal Year 2025-2026 draft budgets to the Housing Authority of the City of Alameda (AHA) Board of Commissioners for approval. Upon the Board's approval, Property Operations and Asset Management will submit the budgets to the appropriate lenders and regulatory agencies. Staff will bring any revision requests from finders, over 10% of the total budget, back to the Board of Commissioners for approval.

### **FISCAL IMPACT**

Not applicable.





**CEQA**

Not applicable.

**RECOMMENDATION**

Approve property budgets for the Housing Authority of the City of Alameda owned properties for July 1, 2025 - June 30, 2026.

**ATTACHMENTS**

1. AHA 2026 Budget Detail
2. PG 2026 Budget Details

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'NG', is positioned above the printed name.

Nancy Gerardin, Director of Property Operations

Hide or Unhide Rows

		2026 Budget	
		Budget	Per Unit
<b>RENTAL INCOME</b>			
5120-005 MARKET RENT (26 Apts.)	[ 1 ]	122,172	4,699
5121-000 TENANT ASSISTANCE PAYME	[ 2 ]	523,656	20,141
5299-000 (LOSS)/GAIN TO LEASE	[ 3 ]	67,404	2,592
GROSS POTENTIAL RENT		713,232	27,432
5220-000 VACANCIES (6.5%)	[ 4 ]	(41,979)	(1,615)
5940-005 BAD DEBT	[ 5 ]	(1,783)	(69)
5940-010 BAD DEBT RECOVERY	[ 6 ]	446	17
NET RENTAL INCOME		669,916	25,766
<b>OTHER INCOME</b>			
5410-000 INTEREST INCOME-OPERATI		0	0
5910-000 LAUNDRY SERVICE	[ 7 ]	800	31
5920-000 NSF AND LATE CHARGES	[ 8 ]	1,500	58
5940-000 FORFEITED TENANT SECURI	[ 9 ]	600	23
5990-000 OTHER REVENUE	[ 10 ]	6,858	264
5990-300 APPLICATION SCREENING FE	[ 11 ]	113	4
TOTAL OTHER INCOME		9,871	380
<b>NET INCOME</b>		679,786	26,146
<b>PAYROLL &amp; BENEFITS</b>			
6330-000 MANAGEMENT SALARIES	[ 12 ]	23,818	916
6330-200 LEASING SALARY		0	0
6335-000 BONUS SALARIES	[ 13 ]	937	36
6500-100 MAINT. SUPERVISOR - SALAR		0	0
6500-200 MAINT. TECHNICIAN - SALAR	[ 14 ]	23,029	886
6711-000 PAYROLL TAXES	[ 15 ]	4,385	169
6380-000 PAYROLL ADMIN		0	0
6722-000 WORKMAN'S COMPENSATION	[ 16 ]	2,847	110
6722-100 SAFE FUND	[ 17 ]	1,693	65
6723-000 HEALTH INS. & EMPL. BENEFI	[ 18 ]	8,055	310
TOTAL PAYROLL		64,764	2,491

**LEASING AND MARKETING**

6250-000 OTHER RENTING EXPENSE	[ 19 ]	535	21
6250-010 RESIDENT FUNCTIONS	[ 20 ]	214	8
TOTAL LEASING AND MAR		749	29

**ADMIN. EXPENSES**

6200-550 EMPLOYEE ADS	[ 21 ]	450	17
6250-100 CREDIT REPORTS	[ 22 ]	678	26
6250-700 DUES\SUBSCRIPTIONS	[ 23 ]	247	10
6310-500 OFFICE EQUIPMENT	[ 24 ]	427	16
6311-000 OFFICE SUPPLIES	[ 25 ]	535	21
6320-000 MGMT. FEES (\$49.00)	[ 26 ]	15,288	588
6320-350 SOCIAL SERVICES FEE	[ 27 ]	17,826	686
6320-500 ASSET MGMT FEE		0	0
6340-000 LEGAL EXPENSES (PROJECT	[ 28 ]	2,200	85
6350-000 AUDITING EXPENSES (PROJE	[ 29 ]	2,170	83
6350-100 COMPLIANCE EXPENSE	[ 30 ]	2,589	100
6351-000 BOOKKEEPING FEES/ACCOU		0	0
6360-000 TELEPHONE & ANSWERING S	[ 31 ]	845	33
6360-100 INTERNET ACCESS	[ 32 ]	410	16
6360-200 MEETING/STAFF DEVELOPME	[ 33 ]	214	8
6370-100 POSTAGE	[ 34 ]	180	7
6370-200 BANK CHARGES		0	0
6370-300 TRAVEL/MILEAGE	[ 35 ]	50	2
6390-000 MISCELLANEOUS ADMIN. EXP		0	0
6390-010 RENTERS INSURANCE EXPEN	[ 36 ]	3,432	132
6390-060 COMPUTER EXPENSE OFFICE	[ 37 ]	1,389	53
6390-100 HOMEOWNER DUES	[ 38 ]	63,720	2,451
6390-065 COMPUTER SOFTWARE EXP	[ 39 ]	5,429	209
6390-150 TRAINING	[ 40 ]	2,439	94

TOTAL & ADMIN. EXPEN		120,519	4,635
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**UTILITIES EXPENSES**

6450-000 ELECTRICITY	[ 41 ]	2,307	89
6451-000 WATER	[ 42 ]	11,881	457
6452-000 GAS	[ 43 ]	1,587	61
6453-000 SEWER	[ 44 ]	14,586	561
6454-000 GARBAGE AND TRASH	[ 45 ]	13,034	501
6454-010 EXTRAORDINARY TRASH REM	[ 46 ]	3,000	115

TOTAL UTILITIES EXP.		46,395	1,784
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**OPER. & MAINT. EXPENSES**

6515-000	CLEANING SUPPLIES	[ 47 ]	675	26
6517-000	CLEANING CONTRACT (UNIT	[ 48 ]	750	29
6517-100	CARPET CLEANING CONTRAC	[ 49 ]	1,275	49
6519-000	EXTERMINATING CONTRACT	[ 50 ]	2,750	106
6530-100	ALARM SERVICE		0	0
6536-000	GROUND SUPPLIES	[ 51 ]	250	10
6537-000	GROUND CONTRACT	[ 52 ]	11,125	428
6541-050	REPAIRS MATERIAL-APPLIAN	[ 53 ]	300	12
6541-200	REPAIRS MATERIAL-ELECTRI	[ 54 ]	200	8
6541-300	REPAIRS MATERIAL-PLUMBIN	[ 55 ]	1,000	38
6541-400	REPAIRS MATERIAL-CARPET/		0	0
6541-600	REPAIRS MATERIAL-LIGHTS/F	[ 56 ]	200	8
6541-900	REPAIRS MATERIAL-MISC.	[ 57 ]	2,000	77
6541-901	REPAIR MATERIALS-FIRE PRC	[ 58 ]	400	15
6541-904	REPAIR MAT-DOORS/WINDOW	[ 59 ]	400	15
6541-905	REPAIR MATERIALS-KEYS/LO	[ 60 ]	600	23
6541-906	REPAIR MATERIAL-EQUIP/TO	[ 61 ]	150	6
6541-908	REPAIR MATERIALS-UNIFORM	[ 62 ]	107	4
6542-050	REPAIRS CONTRACT-APPLIAI		0	0
6542-200	REPAIRS CONTRACT-ELECTF	[ 63 ]	1,000	38
6542-300	REPAIRS CONTRACT-PLUMBI	[ 64 ]	10,000	385
6542-900	REPAIRS CONTRACT-MISC.		0	0
6542-901	REPAIR CONTRACT-FIRE PRC	[ 65 ]	600	23
6542-905	REPAIR CONTRACT-KEYS/LO	[ 66 ]	500	19
6542-907	REPAIR CONTRACT-ROOF	[ 67 ]	1,500	58
6546-000	HEATING & A/C REPAIRS & M.	[ 68 ]	2,500	96
6560-100	INTERIOR PAINTING CONTRA	[ 69 ]	4,500	173
6560-110	PAINTING SUPPLIES	[ 70 ]	551	21
6561-100	WINDOW COVERINGS	[ 71 ]	500	19

TOTAL OPERATING & MAI	43,833	1,686
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**TURNOVER EXPENSES**

TOTAL TURNOVER EXPEN	0	0
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**TAXES AND INSURANCE**

6710-050	CITY TAXES		0	0
6720-000	PROPERTY & LIAB. INS. (HAZ	[ 72 ]	26,720	1,028
6720-200	PROPERTY INSURANCE - FLC		0	0

TOTAL TAXES AND INSUR	26,720	1,028
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<b>TOTAL OPERATING EXPENSES</b>		302,979	11,653
<b>NET OPERATING INCOME</b>		376,807	14,493
<b>FINANCIAL EXPENSES</b>			
6810-000 INTEREST ON FIRST LOAN	[ 73 ]	1,604	62
TOTAL FINANCIAL EXPENSE		1,604	62
<b>CORPORATE ENTITY</b>			
TOTAL CORPORATE ENTITY		0	0
<b>CAPITAL EXPENSES</b>			
7310-000 ASPHALT		0	0
7315-000 LANDSCAPE		0	0
7320-400 WALLS AND FENCES		0	0
7335-000 SIGNAGE		0	0
7310-600 WATER HEATERS		0	0
7350-000 CARPET & FLOOR REPLACEMENT	[ 74 ]	5,000	192
7370-000 HEATING/AIR CONDITIONING		0	0
7380-000 APPLIANCE REPLACEMENT	[ 75 ]	3,000	115
7390-000 OTHER CAPITAL EXPENSES		0	0
TOTAL CAPITAL EXPENSE		8,000	308
<b>REHAB EXPENSE</b>			
7575-000 HVAC REPLACEMENT		0	0
TOTAL REHAB EXPENSE		0	0
<b>NET INCOME</b>		367,203	14,123

## Parrot Gardens

Hide or Unhide Rows

		2026 Budget	
		Budget	Per Unit
<b>RENTAL INCOME</b>			
5120-005 MARKET RENT (8 Apts.)	[ 1 ]	168,072	21,009
5121-000 TENANT ASSISTANCE PAYMENTS	[ 2 ]	148,680	18,585
5299-000 (LOSS)/GAIN TO LEASE	[ 3 ]	(20,904)	(2,613)
GROSS POTENTIAL RENT		295,848	36,981
5220-000 VACANCIES (1.5%)	[ 4 ]	(4,751)	(594)
5731-000 RENT FREE UNIT (MGR)	[ 5 ]	(5,100)	(638)
5940-005 BAD DEBT	[ 6 ]	(740)	(92)
5940-010 BAD DEBT RECOVERY	[ 7 ]	185	23
NET RENTAL INCOME		285,442	35,680
<b>OTHER INCOME</b>			
5410-000 INTEREST INCOME-OPERATIONS		0	0
5490-000 INTEREST INCOME-MISCELLANEOUS		0	0
5920-000 NSF AND LATE CHARGES	[ 8 ]	150	19
5940-000 FORFEITED TENANT SECURITY DEP.	[ 9 ]	200	25
5990-000 OTHER REVENUE	[ 10 ]	40,915	5,114
5990-300 APPLICATION SCREENING FEE	[ 11 ]	38	5
TOTAL OTHER INCOME		41,303	5,163
<b>NET INCOME</b>		326,745	40,843
<b>PAYROLL &amp; BENEFITS</b>			
6330-000 MANAGEMENT SALARIES	[ 12 ]	6,605	826
6330-100 ASST MANAGER SALARY	[ 13 ]	5,016	627
6330-200 LEASING SALARY		0	0
6335-000 BONUS SALARIES	[ 14 ]	357	45
6500-100 MAINT. SUPERVISOR - SALARY		0	0
6500-200 MAINT. TECHNICIAN - SALARY	[ 15 ]	6,013	752
6535-000 GROUNDS PAYROLL	[ 16 ]	4,051	506
6711-000 PAYROLL TAXES	[ 17 ]	2,633	329
6380-000 PAYROLL ADMIN		0	0
6722-000 WORKMAN'S COMPENSATION	[ 18 ]	1,620	202
6722-100 SAFE FUND	[ 19 ]	782	98
6723-000 HEALTH INS. & EMPL. BENEFITS	[ 20 ]	4,028	503



TOTAL PAYROLL		31,104	3,888
<b>LEASING AND MARKETING</b>			
6250-000 OTHER RENTING EXPENSE	[ 21 ]	135	17
6250-010 RESIDENT FUNCTIONS	[ 22 ]	180	23
TOTAL LEASING AND MARKETING		315	39
<b>ADMIN. EXPENSES</b>			
6200-550 EMPLOYEE ADS	[ 23 ]	450	56
6250-015 TENANT SERVICES		0	0
6250-100 CREDIT REPORTS	[ 24 ]	618	77
6250-700 DUES\SUBSCRIPTIONS	[ 25 ]	76	10
6310-500 OFFICE EQUIPMENT		0	0
6311-000 OFFICE SUPPLIES	[ 26 ]	275	34
6320-000 MGMT. FEES (\$49.00)	[ 27 ]	4,704	588
6320-350 SOCIAL SERVICES FEE	[ 28 ]	4,015	502
6340-000 LEGAL EXPENSES (PROJECT)	[ 29 ]	1,100	138
6350-000 AUDITING EXPENSES (PROJECT)	[ 30 ]	806	101
6350-100 COMPLIANCE EXPENSE	[ 31 ]	1,073	134
6351-000 BOOKKEEPING FEES/ACCOUNTING		0	0
6360-000 TELEPHONE & ANSWERING SERVICE	[ 32 ]	845	106
6360-100 INTERNET ACCESS	[ 33 ]	407	51
6360-200 MEETING/STAFF DEVELOPMENT	[ 34 ]	90	11
6370-100 POSTAGE	[ 35 ]	70	9
6370-200 BANK CHARGES		0	0
6370-300 TRAVEL/MILEAGE	[ 36 ]	50	6
6390-000 MISCELLANEOUS ADMIN. EXPENSES		0	0
6390-010 RENTERS INSURANCE EXPENSE	[ 37 ]	1,056	132
6390-060 COMPUTER EXPENSE OFFICE	[ 38 ]	1,556	195
6390-065 COMPUTER SOFTWARE EXPENSE	[ 39 ]	4,517	565
6390-150 TRAINING	[ 40 ]	311	39
TOTAL & ADMIN. EXPENSES		22,018	2,752
<b>UTILITIES EXPENSES</b>			
6450-000 ELECTRICITY	[ 41 ]	469	59
6450-500 GAS/ELECTRIC VACANT UNIT	[ 42 ]	50	6
6451-000 WATER	[ 43 ]	16,005	2,001
6452-000 GAS		0	0
6453-000 SEWER	[ 44 ]	9,643	1,205
6454-000 GARBAGE AND TRASH	[ 45 ]	16,250	2,031
6454-010 EXTRAORDINARY TRASH REMOVAL	[ 46 ]	750	94

TOTAL UTILITIES EXP.		43,167	5,396
<b>OPER. &amp; MAINT. EXPENSES</b>			
6515-000 CLEANING SUPPLIES	[ 47 ]	810	101
6517-000 CLEANING CONTRACT (UNITS)	[ 48 ]	500	63
6517-050 CLEANING CONTRACT (COMMON)		0	0
6517-100 CARPET CLEANING CONTRACT	[ 49 ]	925	116
6519-000 EXTERMINATING CONTRACT	[ 50 ]	4,800	600
6530-000 PATROL SERVICE CONTRACT		0	0
6530-100 ALARM SERVICE	[ 51 ]	1,778	222
6536-000 GROUNDS SUPPLIES	[ 52 ]	500	63
6537-000 GROUNDS CONTRACT	[ 53 ]	5,000	625
6541-050 REPAIRS MATERIAL-APPLIANCES	[ 54 ]	300	38
6541-200 REPAIRS MATERIAL-ELECTRICAL	[ 55 ]	150	19
6541-300 REPAIRS MATERIAL-PLUMBING	[ 56 ]	500	63
6541-600 REPAIRS MATERIAL-LIGHTS/FANS/FIXTURES	[ 57 ]	175	22
6541-900 REPAIRS MATERIAL-MISC.	[ 58 ]	300	38
6541-901 REPAIR MATERIALS-FIRE PROT	[ 59 ]	550	69
6541-904 REPAIR MAT-DOORS/WINDOWS	[ 60 ]	165	21
6541-905 REPAIR MATERIALS-KEYS/LOCKS	[ 61 ]	500	63
6541-906 REPAIR MATERIAL-EQUIP/TOOLS	[ 62 ]	250	31
6541-908 REPAIR MATERIALS-UNIFORMS	[ 63 ]	54	7
6542-200 REPAIRS CONTRACT-ELECTRICAL	[ 64 ]	400	50
6542-300 REPAIRS CONTRACT-PLUMBING	[ 65 ]	2,200	275
6542-900 REPAIRS CONTRACT-MISC.		0	0
6542-901 REPAIR CONTRACT-FIRE PROT	[ 66 ]	600	75
6542-905 REPAIR CONTRACT-KEYS/LOCKS	[ 67 ]	400	50
6542-907 REPAIR CONTRACT-ROOF	[ 68 ]	850	106
6546-000 HEATING & A/C REPAIRS & MAINT.	[ 69 ]	850	106
6560-100 INTERIOR PAINTING CONTRACT	[ 70 ]	1,500	188
6560-110 PAINTING SUPPLIES	[ 71 ]	815	102
6561-100 WINDOW COVERINGS	[ 72 ]	500	63
6590-000 MISC. OPER. & MAINT. REPAIRS		0	0
TOTAL OPERATING & MAINT. EXPENSE		25,372	3,171
<b>TURNOVER EXPENSES</b>			
TOTAL TURNOVER EXPENSES		0	0
<b>TAXES AND INSURANCE</b>			
6710-000 PROPERTY TAXES - REAL		0	0
6710-050 CITY TAXES		0	0
6720-000 PROPERTY & LIAB. INS. (HAZARD)	[ 73 ]	9,000	1,125

TOTAL TAXES AND INSURANCE		9,000	1,125
<b>TOTAL OPERATING EXPENSES</b>		130,976	16,372
<b>NET OPERATING INCOME</b>		195,769	24,471
<b>FINANCIAL EXPENSES</b>			
TOTAL FINANCIAL EXPENSES		0	0
<b>CORPORATE ENTITY</b>			
TOTAL CORPORATE ENTITY		0	0
<b>CAPITAL EXPENSES</b>			
7310-000 ASPHALT	[ 74 ]	92,000	11,500
7315-000 LANDSCAPE		0	0
7320-000 EXTERIOR PAINTING		0	0
7320-200 HANDRAILS/DECKINGS	[ 75 ]	4,500	563
7320-400 WALLS AND FENCES	[ 76 ]	8,800	1,100
7330-000 ROOFING		0	0
7335-000 SIGNAGE	[ 77 ]	8,500	1,063
7340-000 SIDING		0	0
7350-000 CARPET & FLOOR REPLACEMENT	[ 78 ]	3,000	375
7380-000 APPLIANCE REPLACEMENT	[ 79 ]	1,500	188
		0	0
7390-000 OTHER CAPITAL EXPENSES	[ 80 ]	32,000	4,000
7391-600 CONSTRUCTION OVERSIGHT	[ 81 ]	225	28
<b>TOTAL CAPITAL EXPENSES</b>		150,525	18,816
<b>NET INCOME</b>		45,244	5,655



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Nancy Gerardin, Director of Property Operations

Date: June 18, 2025

Re: Approve property budget for Independence Plaza for July 1, 2025 through June 30, 2026.

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### **BACKGROUND**

The role of Property Operations and Asset Management is to ensure compliance with applicable regulatory agreements and underwritten financial performance.

In collaboration with FPI Management, a third-party property management company, Property Operations and Asset Management have prepared and now submit the annual operating budget for Independence Plaza (186 units).

### **DISCUSSION**

The operating budget is a projection of the upcoming fiscal year's (FY 2025-2026) operating revenue and expenses, including administrative, marketing, utilities, operating and maintenance, taxes and insurance, and resident services. The budget also includes other required financial expenses, such as the monthly debt service payments and replacement reserve deposits for projecting the amount of cash flow available for distribution where applicable. The fiscal year budget includes the replacement reserve amount of \$86,136 (adjusted by the Operating Cost Adjust Factor starting in December) as required by the Restore Rebuild conversion. Property Operations, Asset Management, and Finance have reviewed and now submit the FY 2025-2026 draft budget to the Housing Authority of the City of Alameda (AHA) Board of Commissioners for approval. Upon the Board's approval, Property Operations and Asset Management will submit the budget to the appropriate lenders and regulatory agencies. Staff will bring any revision requests from finders, over 10% of the total budget, back to the Board of Commissioners for approval.

### **FISCAL IMPACT**

Not applicable.

### **CEQA**



Not applicable.

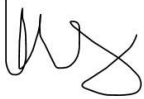
**RECOMMENDATION**

Approve the property budget for Independence Plaza for July 1, 2025 through June 30, 2026.

**ATTACHMENTS**

1. IP 2026 Budget Details

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'NG', is positioned below the text 'Respectfully submitted,'.

Nancy Gerardin, Director of Property Operations

			2026 Budget	
			Budget	Per Unit
<b>RENTAL INCOME</b>				
5120-005 MARKET RENT (186 Apts.)	[ 1 ]		2,361,516	12,696
5121-000 TENANT ASSISTANCE PAYMENTS	[ 2 ]		2,981,592	16,030
5299-000 (LOSS)/GAIN TO LEASE	[ 3 ]		(1,020,228)	(5,485)
GROSS POTENTIAL RENT			4,322,880	23,241
5220-000 VACANCIES (5.0%)	[ 4 ]		(267,155)	(1,436)
5731-000 RENT FREE UNIT (MGR)	[ 5 ]		(72,072)	(387)
5940-005 BAD DEBT	[ 6 ]		(21,614)	(116)
5940-010 BAD DEBT RECOVERY	[ 7 ]		5,404	29
NET RENTAL INCOME			3,967,442	21,330
<b>OTHER INCOME</b>				
5410-000 INTEREST INCOME-OPERATIONS			0	0
5440-000 INTEREST INCOME-R&R			0	0
5910-000 LAUNDRY SERVICE	[ 8 ]		13,200	71
5920-000 NSF AND LATE CHARGES	[ 9 ]		1,300	7
5930-000 DAMAGES AND CLEANING FEES			0	0
5940-000 FORFEITED TENANT SECURITY DEP.	[ 10 ]		4,800	26
5990-000 OTHER REVENUE	[ 11 ]		2,561,722	13,773
5990-300 APPLICATION SCREENING FEE	[ 12 ]		900	5
5191-000 CITY TAX			0	0
5380-000 RECREATION AND REHABILITATION			0	0
TOTAL OTHER INCOME			2,581,922	13,881
NET INCOME			6,549,364	35,212
<b>PAYROLL &amp; BENEFITS</b>				
6330-000 MANAGEMENT SALARIES	[ 13 ]		85,229	458
6330-100 ASST MANAGER SALARY	[ 14 ]		56,002	301
6330-200 LEASING SALARY			0	0
6335-000 BONUS SALARIES	[ 15 ]		4,450	24
6500-100 MAINT. SUPERVISOR - SALARY	[ 16 ]		76,422	411
6500-200 MAINT. TECHNICIAN - SALARY	[ 17 ]		62,537	336

6535-000	GROUNDS PAYROLL	[ 18 ]	50,932	274
6600-500	MAINTENANCE SUPERVISOR		0	0
6711-000	PAYROLL TAXES	[ 19 ]	27,726	149
6380-000	PAYROLL ADMIN	[ 20 ]	2,095	11
6722-000	WORKMAN'S COMPENSATION	[ 21 ]	24,240	130
6722-100	SAFE FUND	[ 22 ]	11,855	64
6723-000	HEALTH INS. & EMPL. BENEFITS	[ 23 ]	55,938	301
			<hr/>	
TOTAL PAYROLL			457,425	2,459
 <b>LEASING AND MARKETING</b>				
6250-000	OTHER RENTING EXPENSE	[ 24 ]	2,000	11
6250-010	RESIDENT FUNCTIONS	[ 25 ]	3,000	16
TOTAL LEASING AND MARKETING			5,000	27
 <b>ADMIN. EXPENSES</b>				
6200-550	EMPLOYEE ADS	[ 26 ]	1,125	6
6250-100	CREDIT REPORTS	[ 27 ]	1,906	10
6250-700	DUES\SUBSCRIPTIONS	[ 28 ]	1,767	10
6310-500	OFFICE EQUIPMENT	[ 29 ]	4,000	22
6311-000	OFFICE SUPPLIES	[ 30 ]	7,000	38
6320-000	MGMT. FEES (\$49.00)	[ 31 ]	109,368	588
6320-350	SOCIAL SERVICES FEE	[ 32 ]	93,340	502
6340-000	LEGAL EXPENSES (PROJECT)	[ 33 ]	13,200	71
6350-000	AUDITING EXPENSES (PROJECT)	[ 34 ]	7,502	40
6350-100	COMPLIANCE EXPENSE	[ 35 ]	19,371	104
6360-000	TELEPHONE & ANSWERING SERVICE	[ 36 ]	1,600	9
6360-100	INTERNET ACCESS		0	0
6360-200	MEETING/STAFF DEVELOPMENT	[ 37 ]	600	3
6370-100	POSTAGE	[ 38 ]	500	3
6370-200	BANK CHARGES		0	0
6370-300	TRAVEL/MILEAGE	[ 39 ]	500	3
6390-010	RENTERS INSURANCE EXPENSE	[ 40 ]	24,552	132
6390-060	COMPUTER EXPENSE OFFICE	[ 41 ]	4,950	27
6390-065	COMPUTER SOFTWARE EXPENSE	[ 42 ]	14,462	78
6390-150	TRAINING	[ 43 ]	5,165	28
			<hr/>	
TOTAL & ADMIN. EXPENSES			310,909	1,672
 <b>UTILITIES EXPENSES</b>				
6450-000	ELECTRICITY	[ 44 ]	55,657	299
6450-500	GAS/ELECTRIC VACANT UNIT	[ 45 ]	1,500	8
6451-000	WATER	[ 46 ]	136,540	734



6452-000 GAS	[ 47 ]	26,348	142
6453-000 SEWER	[ 48 ]	46,254	249
6454-000 GARBAGE AND TRASH	[ 49 ]	85,913	462
6454-010 EXTRAORDINARY TRASH REMOVAL	[ 50 ]	20,000	108

TOTAL UTILITIES EXP.		372,212	2,001
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# **OPER. & MAINT. EXPENSES**

6515-000 CLEANING SUPPLIES	[ 51 ]	5,340	29
6517-000 CLEANING CONTRACT (UNITS)	[ 52 ]	3,600	19
6517-050 CLEANING CONTRACT (COMMON)		0	0
6517-100 CARPET CLEANING CONTRACT	[ 53 ]	4,350	23
6519-000 EXTERMINATING CONTRACT	[ 54 ]	14,904	80
6530-000 PATROL SERVICE CONTRACT		0	0
6530-100 ALARM SERVICE	[ 55 ]	17,444	94
6536-000 GROUNDS SUPPLIES	[ 56 ]	15,000	81
6537-000 GROUNDS CONTRACT	[ 57 ]	30,000	161
6541-050 REPAIRS MATERIAL-APPLIANCES	[ 58 ]	11,000	59
6541-200 REPAIRS MATERIAL-ELECTRICAL	[ 59 ]	2,300	12
6541-300 REPAIRS MATERIAL-PLUMBING	[ 60 ]	11,250	60
6541-600 REPAIRS MATERIAL-LIGHTS/FANS/FIXTURES	[ 61 ]	5,650	30
6541-900 REPAIRS MATERIAL-MISC.	[ 62 ]	1,200	6
6541-901 REPAIR MATERIALS-FIRE PROTECTIVE	[ 63 ]	1,500	8
6541-904 REPAIR MATERIALS-DOORS/WINDOWS	[ 64 ]	3,500	19
6541-905 REPAIR MATERIALS-KEYS/LOCKS	[ 65 ]	4,650	25
6541-906 REPAIR MATERIALS-EQUIP/TOOLS	[ 66 ]	4,650	25
6541-907 REPAIR MATERIALS-ROOF	[ 67 ]	7,750	42
6541-908 REPAIR MATERIALS-UNIFORMS	[ 68 ]	900	5
6542-200 REPAIRS CONTRACT-ELECTRICAL	[ 69 ]	8,750	47
6542-300 REPAIRS CONTRACT-PLUMBING	[ 70 ]	20,000	108
6542-400 REPAIRS CONTRACT-CARPET/FLOOR		0	0
6542-600 REPAIRS CONTRACT-LIGHTS/FANS/FIXTURES	[ 71 ]	2,200	12
6542-900 REPAIRS CONTRACT-MISC.		0	0
6542-901 REPAIR CONTRACT-FIRE PROTECTIVE	[ 72 ]	3,300	18
6542-904 REPAIR CONTRACT-DOORS/WINDOWS	[ 73 ]	5,250	28
6542-905 REPAIR CONTRACT-KEYS/LOCKS	[ 74 ]	5,700	31
6542-908 REPAIR CONTRACT-UNIFORMS		0	0
6545-000 ELEVATOR MAINTENANCE/CONTRACT	[ 75 ]	45,000	242
6546-000 HEATING & A/C REPAIRS & MAINT.	[ 76 ]	5,500	30
6547-000 SWIMMING POOL CONTRACT	[ 77 ]	2,000	11
6560-100 INTERIOR PAINTING CONTRACT	[ 78 ]	28,800	155
6560-110 PAINTING SUPPLIES	[ 79 ]	6,560	35
6561-100 WINDOW COVERINGS	[ 80 ]	1,300	7
6580-000 SECURITY GATE SERVICING/MAINT.	[ 81 ]	5,100	27

6541-915 FOB REPLACEMENT		0	0
6542-903 REPAIR CONTRACT-INTERIOR REPAIRS		0	0
TOTAL OPERATING & MAINT. EXPENSE		284,448	1,529
<b>TURNOVER EXPENSES</b>			
6646-000 HVAC REPAIRS & MAINT.		0	0
TOTAL TURNOVER EXPENSES		0	0
<b>TAXES AND INSURANCE</b>			
6710-000 PROPERTY TAXES - REAL	[ 82 ]	123,646	665
6720-000 PROPERTY & LIAB. INS. (HAZARD)	[ 83 ]	157,046	844
TOTAL TAXES AND INSURANCE		280,692	1,509
<b>TOTAL OPERATING EXPENSES</b>		1,710,685	9,197
<b>NET OPERATING INCOME</b>		4,838,679	26,014
<b>FINANCIAL EXPENSES</b>			
6810-000 INTEREST ON FIRST LOAN		0	0
6890-600 LOAN FEES		0	0
TOTAL FINANCIAL EXPENSES		0	0
<b>CORPORATE ENTITY</b>			
TOTAL CORPORATE ENTITY		0	0
<b>CAPITAL EXPENSES</b>			
7310-000 ASPHALT		0	0
7315-000 LANDSCAPE	[ 84 ]	25,500	137
7320-000 EXTERIOR PAINTING		0	0
7330-000 ROOFING	[ 85 ]	40,000	215
7310-600 WATER HEATERS	[ 86 ]	30,000	161
7350-000 CARPET & FLOOR REPLACEMENT		0	0
7370-000 HEATING/AIR CONDITIONING REPL.	[ 87 ]	18,000	97
7380-000 APPLIANCE REPLACEMENT		0	0
7390-000 OTHER CAPITAL EXPENSES		0	0
7391-600 CONSTRUCTION OVERSIGHT	[ 88 ]	2,400	13

TOTAL CAPITAL EXPENSES	115,900	623
<b>REHAB EXPENSE</b>		
7580-000 CARPET/FLOOR REPLACEMENT	0	0
7585-000 APPLIANCES	0	0
7590-000 BLINDS/WINDOW COVERINGS	0	0
TOTAL REHAB EXPENSE	0	0
<b>NET INCOME</b>	4,722,779	25,391



Housing Authority  
of the  
City of Alameda

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**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Sepideh Kiumarsi, Senior Management Analyst

Date: June 18, 2025

Re: Conduct the Public Hearing for the Significant Amendment to the Annual Plan and Moving to Work Supplement for Fiscal Year 2025-2026.

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### **BACKGROUND**

The Housing Authority of the City of Alameda's (AHA) Annual Plan is a document that is mandated by and must be submitted to the U.S. Department of Housing and Urban Development (HUD). As a Housing Choice Voucher (Section 8) only and High Performer agency, HUD allows AHA to submit a Streamlined Annual PHA (Public Housing Authority) Plan formally referred to as HUD Form 50075-HCV. An Annual Plan must be submitted every year.

In 2022, AHA was accepted into the Moving to Work (MTW) Demonstration Expansion under the Landlord Incentives Cohort to test the effectiveness of landlord incentives. AHA is required to comply with the MTW Operations Notice while participating in the MTW Demonstration Program and as such, needs to submit an MTW Supplement with its Annual Plan every year.

Public Housing Authorities (PHAs) are allowed to make revisions during the fiscal year for which an annual plan was submitted. If a Housing Authority chooses to make revisions, it must identify which plan elements have been revised by the PHA, undergo the public comment process, receive approval from its Board, and submit the revised annual plan to HUD for approval. As part of their 5-Year Plan and Annual Plan, PHAs define the criteria for which a revision meets the definition of a "Significant Amendment or Modification."

In its 5-Year Plan, AHA defined a "Significant Amendment or Modification" as a revision that meets all the following qualifications:

1. Is discretionary (rather than mandated by HUD or other government entity);
2. Fundamentally changes the policies of the Housing Authority;
3. Requires formal approval of the Board of Commissioners; and



4. Would result in changes to a Streamlined Plan submission.

## **DISCUSSION**

Please refer to Attachment A for the amended Annual Plan for fiscal year July 1, 2025 through June 30, 2026. Please note that HUD has moved the submission process for the Annual Plan to an online platform. The online platform requires that the original Annual Plan be approved before an amended Annual Plan is created. Since AHA staff are unable to create and download the amended Annual Plan from the online platform, AHA is using an older version of the HUD Form used for the Annual Plan which requires the same information. Please refer to Attachments B through D for the revised MTW Supplement for fiscal year July 1, 2025 through June 30, 2026, and supporting documents.

On April 9, 2025, HUD issued Public and Indian Housing Notice 2025-08 titled “Statutory and Regulatory Waivers for Family Unification Program and Foster Youth to Independence Vouchers.” AHA wishes to adopt the following optional waivers under Section 7 “Discretionary Program Policies” of this Public and Indian Housing Notice:

- (1) Waive 24 CFR 982.204(f) and maintain a separate waiting list for the AHA’s Family Unification Program vouchers. If, in the future, AHA implements a Foster Youth to Independence program, those referrals will be placed on the Family Unification Program waiting list. If an applicant from the general Housing Choice Voucher waiting list is issued a Family Unification Program voucher, they will be removed from the general Housing Choice Voucher waiting list;
- (2) AHA will utilize the date and time of application in selecting an applicant from the Family Unification Program waiting list among applicants with the same preference status in accordance with AHA’s administrative plan, waiving 24 CFR 982.207(c)(1); and
- (3) Waive 24 CFR 982.207(a)(1) to establish separate preferences for Family Unification Program applicants. The only preference for the Family Unification Program waiting list will be a veteran’s preference, which is mandated by the State of California, and is for a member of the military, a veteran who was discharged or released under conditions other than dishonorable, or a surviving spouse (as defined by the Department of Veteran Affairs).

Section 3202 of the American Rescue Plan Act of 2021 appropriated \$5 billion for the Emergency Housing Voucher program. Funding for the Emergency Housing Voucher program is not part of the annual Housing Choice Voucher renewal funding formula nor are the funds for Emergency Housing Voucher renewals appropriated in the Department of Housing and Urban Development’s annual appropriations Acts. Emergency Housing Vouchers are renewed separately from the regular Housing Choice Voucher program (similar to Mainstream vouchers). All renewal funding for the duration of the Emergency Housing Voucher program has already been appropriated as part of the \$5 billion provided by the American Rescue Plan Act of 2021. This funding was expected to last for ten years from the initial issuance in 2021. However, in March 2025, AHA was informed by HUD that funding for the Emergency Housing Voucher program is expected

to be sufficient through calendar year 2026. In April 2025, AHA received its Emergency Housing Voucher funding letter from the HUD which the AHA expects will not be sufficient to provide its current Emergency Housing Voucher household with assistance for the rest of calendar year 2025. Therefore, AHA is revising its policies to include the following:

Emergency Housing Voucher households that must be terminated solely due to the lack of funding for this program will be automatically placed on the Housing Choice Voucher waiting list and be given the terminated preference along with any other applicable preferences even if the Housing Choice Voucher waiting list is closed.

Due to recent concerns regarding funding, AHA is revising and consolidating its policies regarding terminations due to insufficient funding. AHA's new policy will read as follows:

"In the event of insufficient funding, subject to the Department of Housing and Urban Development requirements, and taking into account any cost-savings measures taken by the AHA, the AHA will determine which programs are affected by the funding cuts and will set a date at which the actions below will be effective.

After AHA has determined which programs are affected, if not all programs are affected by the funding cuts and has set a date, the following measures will be taken in the following order until AHA has determined that it has sufficient funding for a reasonable time subject to the Department of Housing and Urban Development requirements:

1. Cease landlord incentives and vacancy loss payments under the Moving to Work program for any Request for Tenancy Approvals received after the effective date;
2. Deny the absorption of any new portability moves that the AHA receives;
3. Cease the issuance of new tenant-based vouchers based on the Department of Housing and Urban Development shortfall guidelines in place at the time of insufficient funding;
4. Deny any portability moves outside of the AHA's jurisdiction if the receiving Public Housing Authority will bill the AHA for the portability voucher and the cost of the Housing Assistance Payments will increase due to the move;
5. Deny requests for Project-Based Voucher to Housing Choice Voucher conversions if the cost of the Housing Assistance Payments will increase due to the move;
6. Rescind an applicant's voucher where the applicant has not submitted a Request for Tenancy Approval by the effective date;
7. Rescind an applicant's voucher where the applicant has submitted a Request for Tenancy Approval but has not submitted a lease by the effective date;
8. Terminate Housing Choice Voucher assistance in the reverse order in which the households received assistance from the Housing Choice Voucher program; and
9. Terminate Project-Based Voucher assistance first for those projects where

only an Agreement to Enter into a Housing Assistance Payments Contract has been signed and then by the expiration date in order of Housing Assistance Payments contracts set to expire from soonest to oldest. This order may be changed if the owner can show that the project would become unstable if the Housing Assistance Payments contract is cancelled.

Please note that funding earmarked exclusively for families with particular characteristics may alter the order in which families are served. For example, funding for the Department of Housing and Urban Development Veterans Affairs Supportive Housing program must be used for Department of Housing and Urban Development Veteran Affairs Supportive Housing families, so if there is sufficient funding in that allocation, Department of Housing and Urban Development Veterans Affairs Supportive Housing families may not be terminated in the above order.

Participants who are terminated from the voucher program solely due to insufficient funding and applicants whose vouchers have been revoked solely due to insufficient funding will be added back to the appropriate AHA waiting list(s) and will receive the “terminated” preference.

Once the AHA has received notification from the Department of Housing and Urban Development that it has sufficient funding, the following measures will be taken in the following order, until funding has been exhausted:

1. Approve requests to move for Reasonable Accommodations or Violence Against Women’s Act;
2. Approve requests for Project-Based Voucher to Housing Choice Voucher conversions; and
3. Process applicants from the AHA’s waiting list.

The Executive Director can make exceptions to the processes above, subject to the Department of Housing and Urban Development requirements. Exceptions will be brought to the Board for ratification at the next routine meeting.”

### **FISCAL IMPACT**

Not Applicable.

### **CEQA**

Not Applicable.

### **RECOMMENDATION**

Conduct the Public Hearing for the Significant Amendment to the Annual Plan and Moving to Work Supplement for Fiscal Year 2025-2026.

### **ATTACHMENTS**

1. Attachment A - Amended Annual Plan FY 2025-2026
2. Attachment B - Revised MTW Supplement FY 2025-2026

3. Attachment C - MTW Activity 2025-01 Hardship Policy
4. Attachment D - MTW Activity 2025-01 Impact Analysis

Respectfully submitted,

*Sepideh Kiumarsi*

Sepideh Kiumarsi, Senior Management Analyst



<b>Streamlined Annual PHA Plan (HCV Only PHAs)</b>	<b>U.S. Department of Housing and Urban Development Office of Public and Indian Housing</b>	<b>OMB No. 2577-0226 Expires 03/31/2024</b>
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**Purpose.** The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, including changes to these policies, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

**Applicability.** The Form HUD-50075-HCV is to be completed annually by **HCV-Only PHAs**. PHAs that meet the definition of a Standard PHA, Troubled PHA, High Performer PHA, Small PHA, or Qualified PHA do not need to submit this form. Where applicable, separate Annual PHA Plan forms are available for each of these types of PHAs.

**Definitions.**

- (1) **High-Performer PHA** – A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers, and was designated as a high performer on both the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAP) assessments if administering both programs, or PHAS if only administering public housing.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP troubled, that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceed 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAP assessment and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550, and that was designated as a standard performer in the most recent PHAS and SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined and is not PHAS or SEMAP troubled.

A. PHA Information.				
A.1	<b>PHA Name:</b> HOUSING AUTHORITY OF THE CITY OF ALAMEDA <span style="float: right;"><b>PHA Code:</b> CA062</span> <b>PHA Plan for Fiscal Year Beginning:</b> (MM/YYYY): 07/2025 <b>PHA Inventory</b> (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) <b>Number of Housing Choice Vouchers (HCVs):</b> 2059 <b>PHA Plan Submission Type:</b> <input type="checkbox"/> Annual Submission <input checked="" type="checkbox"/> Revised Annual Submission			
	<b>Availability of Information.</b> In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information of the PHA policies contained in the standard Annual Plan but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at the main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website.			
	The Revised Annual PHA Plan and Elements, for the period starting July 1, 2025, and ending June 30, 2026, are available at: 701Atlantic Avenue, Alameda, CA 94501. The Revised Annual PHA Plan and Elements are also available at the Housing Authority of the City of Alameda's website at <a href="http://www.alamedahsg.org">www.alamedahsg.org</a> .			
	<input type="checkbox"/> <b>PHA Consortia:</b> (Check box if submitting a joint Plan and complete table below)			
	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia
	Lead HA:			No. of Units in Each Program

<b>B.</b>	<b>Plan Elements.</b>				

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B.1

**Revision of Existing PHA Plan Elements.**

a) Have the following PHA Plan elements been revised by the PHA since its last Annual Plan submission?

Y N

- ☐ ☒ Statement of Housing Needs and Strategy for Addressing Housing Needs.  
☒ ☐ Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.  
☐ ☒ Financial Resources.  
☐ ☒ Rent Determination.  
☐ ☒ Operation and Management.  
☐ ☒ Informal Review and Hearing Procedures.  
☐ ☒ Homeownership Programs.  
☐ ☒ Self Sufficiency Programs and Treatment of Income Changes Resulting from Welfare Program

**Requirements.**

- ☐ ☒ Substantial Deviation.  
☒ ☐ Significant Amendment/Modification.

(b) If the PHA answered yes for any element, describe the revisions for each element(s):

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B.2	<b>New Activities.</b> – Not Applicable

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**Progress Report.**

Provide a description of the PHA's progress in meeting its Mission and Goals described in its 5-Year PHA Plan.

**GOAL 1: WORK WITH COMMUNITY PARTNERS TO OPTIMIZE AFFORDABLE HOUSING AND SERVICES FOR THE ALAMEDA COMMUNITY.**

Regarding the North Housing Project, a 12-acre former Naval site, the Housing Authority of the City of Alameda (AHA) has an expected completion date of August 2025 for the first phase. When complete, this project will create 586 new affordable homes. AHA's active project pipeline includes five sites, two of which broke ground in 2024 and are 50% complete. Our projects in construction include over 100 housing units, with 60 units reserved as permanent supportive housing. The first 109 units available across two buildings (Estuary I and Linnet Corner) will be provided to unhoused or formerly unhoused, and/or military veterans, with onsite services and comprehensive case management provided by Building Futures along with the Alameda Point Collaborative at Estuary I and LifeSTEPS at Linnet Corner. We will continue to partner with FPI Management for all leasing and property management services at these sites. In September 2023, the AHA closed permanent financing for Rosefield Village, a site of 92 units of affordable, work force housing (aimed at serving households between 60-80% AMI), and transitioned the property to stabilized operations reaching 100% occupancy. To inform and educate the public, the AHA consistently distributes a quarterly tenant newsletter, development pipeline newsletter, and biennial newsletters for landlords and government officials and holds an annual workshop for landlords. The AHA continues to publicly present to the Alameda City Council and its commissions, and the Board of Alameda Unified School District (AUSD), as needed, and holds monthly meetings with AHA landlords about the Landlord portal and quarterly meetings with various local organizations. The Authority has strengthened existing relationships by maintaining and expanding services by offering a landlord portal and redesigning the Authority's website to emphasize the importance of landlord participation. During the 2023-24 fiscal year, AHA distributed \$153,000 worth of financial incentives to AHA's Housing Choice Voucher landlords as part of the landlord cohort under Moving-to-Work (MTW). With the implementation of the landlord incentives, we have successfully brought onboard 41 new City of Alameda private market landlords to provide more affordable housing options to our low-income tenants. Between March and April 2024, an extensive landlord survey was conducted, and feedback was received on how to improve future relations by targeting key areas such as customer service and quick response times. The Authority continues to refer landlords to the city's rental and residential rehabilitation program.

**GOAL 2: USE RESOURCES EFFICIENTLY TO OPERATE IN A SUSTAINABLE MANNER.**

The Authority continues to utilize, expand, and research automated accounting systems to improve overall performance. One example of this is the implementation of the AHA claim management process which streamlines claims related to incidents from incident reporting to insurance reimbursement. A paperless system for staff to scan and submit invoices for approvals has been fully implemented. and utilization has become standard for new vendors; the journal entry approval process has been automated. These changes have vastly improved efficiencies in disbursement and document retention. Additionally, we continue to step away from physical documents and transfer forms into digital format through Laserfiche, such as encouraging staff to create and submit electronic reimbursement requests and other HR-related forms. We have seen an increase in utilization of AHA's on-line Landlord and Vendor Portals, as well as Yardi's Rent Café portal including an increase in online reporting of income changes between annual recertifications for participants. A recent customer survey produced by the AHA has shown that as many as 64% of all our landlords are utilizing our landlord portal, strengthening our outreach and educational efforts. Furthermore, the AHA gathered input from our landlords in key takeaways and points of improvement to maintain better relationships and communication, such as increasing access to and developing automatic notifications of rent change notices through our landlord portals. The AHA has also launched its Intake Portal for participants and applicants. The AHA continues the use of electronic submissions of Request for Tenancy Approval (RFTA) processing and owner rent increase requests. These systems and the available tracking significantly reduce staff time to process RFTAs and owner rent increases. Property rehabilitation was finished according to the near-term capital improvements plan including the repair of the balconies at Independence Plaza and replacement of the roof at Anne B. Diamant. Data from Capital Needs Assessments, appraisals, and accessibility studies are being utilized to conduct financial feasibility analyses on Independence Plaza, China Clipper, and Esperanza regarding needs and opportunities for renovation. The AHA continues to conduct regular site visits of properties to identify current and potential risks that need to be corrected. The AHA works with a 3<sup>rd</sup> party management company for all property operations with continued oversight. The Authority received an executed Moving To Work (MTW) Amendment to the Annual Contributions Contract (ACC) dated March 23, 2022, officially designating the Authority as an MTW Agency. The Authority will continue to spend the next few years studying the effects of landlord incentives in the Housing Choice

Voucher program on the retention and recruitment of landlords. In 2024, the AHA continues to run a total of 12 approved initial activities, all implemented July 1, 2023, along with an additional 2 activities implemented as of February 2024. We have improved efficiency with the implementation of standardizing all contract rent increases to take effect July 1 as well as allowing for self-certification of assets, thus reducing processing times. Furthermore, revisions to the Annual Plan for Fiscal Year (FY) 2024-2025 included the following: (1) addition of an elderly preference to apply to waitlists, prioritizing the availability of housing to elderly individuals; (2) the creation of a new wait list for Restore Rebuild (previously known as Faircloth to RAD) properties, (3) combining two grouped family wait lists for the Project-Based Voucher (PBV) program into one wait list and (4) allowing for payment standard increases to be implemented at every interim as allowed under HOTMA.

### GOAL 3: RETAIN AND RECRUIT EXCELLENT STAFF.

The Authority continues its 6- to 12-month training plan process for new employees, with extensive cross training for all staff. Online training continues to be expanded, particularly for new hires, including agency policies and procedures, Yardi software training, and mandatory training such as Fair Housing, Sexual Harassment, cyber training, customer service, and specialized software. The annual Brown Act training continues to be provided in person. In 2024, Staff in the Housing Programs Department received training for customer service, Housing Quality Standards (HQS) inspections and updated training for the Housing Choice Voucher program including eligibility, rent calculation, and continued occupancy. The training for the Housing Choice Voucher program including eligibility, rent calculation, and continued occupancy is offered frequently and was last completed by staff in 2022. In 2023, the AHA also hosted several training courses for staff including, but not limited to, asset management training, a two-day supervisor training, the Housing Choice Voucher Supervisor and Manager training, a Defensive Driver training course and quarterly procurement trainings. AHA staff also enroll in weekly Nelrod trainings provided through its membership in that organization. The AHA continues to encourage staff to identify opportunities for career development and training as well as participating in other mandatory departmental meetings. Monthly staff meetings are now held in-person and include department reports each month to facilitate broader cross-agency communications, updates on work in progress, and presentations. The Events Committee also plans and facilitates monthly staff events which promote staff interaction and foster job satisfaction. The AHA held a Board Retreat in September 2024 to facilitate discussion and receive feedback and suggestions from the Board of Commissioners regarding the new 5-Year Plan and Strategic Plan. Ongoing compensation studies continue to take place annually to keep in line with competitive salaries including all exempt and non-exempt positions except for contract staff such as the Resident Manager and Executive Director positions. The public sector compensation studies were updated in July 2023 for Director and Exempt level positions. Ergonomic assessments are completed for all new hires, typically within two weeks, and for ongoing staff at their request to assess and improve workspaces. During this review period there were several new hires across almost all departments and staff received promotions on either a permanent or acting basis. The AHA is continuing to grow and operates under a budgeted staff of 58 full-time employees with plans to onboard more positions for assistant directors and management analysts in the future, including the development of our Family Self-Sufficiency (FSS) program with an FSS coordinator.

### GOAL 4: ENSURE FINANCIAL PREPAREDNESS FOR FUTURE CHALLENGES.

The AHA has created dashboards for asset management and property management to review progress and make informed decisions. In addition, AHA utilized Yardi's Asset IQ dashboard (launched in 2022), but have since retired it and are replacing it with Data Connect from Yardi which will allow the same functionality of Asset IQ to monitor the Housing Choice Voucher program metrics along with allowing the AHA to combine financial data from both AHA and FPI for the properties to reduce staff time in preparing property reports. In the meantime, key metrics from property management and the Housing Choice Voucher program are included in the monthly Board of Commissioners packet and available to the public. The AHA has received continued Family Self-Sufficiency (FSS) funding for 2024 and is contracted with a professional social services provider to offer enhanced online services for FSS participants. By the end of March 2024, there were 2 program participant graduates from the FSS program accomplishing a combined total of \$23,000 at the end of their 5 years. Staff are looking to increase program participation and are looking to achieve a goal of 40 participants by October 2024. The AHA continues to provide social services which are available to all participants, applicants, and tenants. These services include Legal Assistance, Housing Counseling, Fair Housing Consultation and Referral Services. The AHA has received 10 Stability Vouchers that it applied for in 2022 and continues to receive funding for Emergency Housing Vouchers and Housing Assistance Payments. The AHA obtained 100% lease-up with its EHV program, but utilization continues to drop due to HUD's prohibition from issuing new EHV after September 2023 as the Stability Voucher program is designed for the same population. In June 2023, the Board authorized the Executive Director to fund the North Housing Master Plan costs of \$4,000,000 with short to midterm use of AHA reserves, agency operating funds, and HUD Moving-To-Work (MTW) fungibility. ICD has also received Reserve Policy permanent loan commitments totaling \$12,938,000 for Estuary I, Estuary II and

Linnet Corner. Predevelopment funds up to \$5,500,000 have been approved for the remaining phases of the North Housing Plan. The Authority presented a formal Reserves Policy to the Board of Commissioners in October 2021, with an amendment to the Reserves Policy in May 2022 and again in May 2024. This included an emphasis on sufficient operating and housing assistance payment reserves with preparation for future housing development and deferred maintenance of the existing real estate portfolio, while leveraging other sources of funds to further the Authority's mission.

#### GOAL 5: MAINTAIN AND IMPROVE DATA INTEGRITY AND COLLECTION.

The AHA continues to review and update systems to ensure that it stays current with industry practices and up-to-date on system security. After rising concerns about ChatGPT, the AHA IT Governance Committee discussed the issue and in July 2023 the AHA prohibited the use of Artificial Intelligence (AI) technologies, including accessing websites like ChatGPT or similar platforms, and preventing the entry of AHA data into AI systems. This policy will protect sensitive data and PII, maintain the integrity of proprietary and internal information, and ensure compliance with data protection regulations. Staff continue to update and expand standard operating procedures (SOPs) for AHA's IT-related operations, including new SOPs for creating recurring work orders in Yardi, processing IT support tickets, and other reoccurring functions. In 2021, the Authority implemented a comprehensive cyber awareness program consisting of integrated software solutions to combat attacks and provide annual staff training to increase awareness of cyber-attacks. In 2023, AHA expanded the use of Multi-Factor Authentication (MFA) for its systems. The AHA continues to expand and optimize its paperless and mobile integration, including online forms, automated communications, and online capability to complete regular recertifications, interim recertifications, and the intake process. The AHA contracted with several online platforms to transition into a paperless system with the implementation of Laserfiche forms, Civic Clerk to manage online Board of Commissioners agendas, moving vendors and landlords toward Electronic Funds Transfers (EFTs), and the purchasing of equipment to further allow for hybrid meetings. We have expanded our use of online platforms this past year with the inclusion of Bonfire (procurement), MyCase (legal cases), Happy Co (site inspections), and Papercut (printer management system). Additionally, on Yardi, we are currently implementing three (3) new modules: Inspection IQ, RentGrow income and asset verification, and Data Connect. The HR department is looking for a new Human Resources Information System (HRIS) software system as the one selected previously did not meet promised performance. Once selected, HR will begin implementing the software starting with automating onboarding processes and facilitating tracking of required documentation for new and existing employees. In the interim, HR has been utilizing the Laserfiche FORMS system to collect required documents and has expanded the onboarding program in the Aspire platform.

#### GOAL 6: IMPROVE THE QUALITY OF LIFE OF RESIDENTS WHILE MAINTAINING EFFICIENT AND EFFECTIVE OPERATIONS OF HOUSING AUTHORITY UNITS.

The Authority launched the Ombudsman program in 2021, which is a solution-oriented community resource available to all Authority tenants, program participants, landlords, and other community organizations that represent Authority tenants or clients. This program reinforces our existing educational materials and continues to provide resident supportive services for all tenants and participants in the programs operated by the Housing Programs Department. The AHA's nonprofit arts partner, Drawbridge, and City of Alameda Recreation and Parks Department Mobile Recreation Program have weekly activities for children living at all AHA properties and the Alameda Food Bank continues to provide food at these activities. Alameda Food Bank provides food and LifeSTEPS manages food distribution to AHA properties twice a month at two different properties. LifeSTEPS continues to conduct in-person meetings with residents to provide aid and link families to financial and social service agencies. The Boys and Girls Club partnership continues to allow access to the program to minors in AHA's units and programs. In the beginning of 2023, the AHA reinstated our in-person Rent Café Workshops to assist with the online recertification and interim portal. The AHA also provides letters explaining available supportive services for those facing eviction and has quarterly social services meetings for all participants. The AHA has also done outreach, including social media blasts, for the City of Alameda's Guaranteed Basic Income Pilot Program and worked with LifeSTEPS to help participants apply for the program. We are looking to further collaborate with pilot Guaranteed Basic Income programs to be implemented by the County of Alameda. Educational materials on Fair Housing laws and reasonable accommodation under the Americans with Disabilities Act is provided at briefings, terminations, and at various points of contact with applicants and participants. In 2021, we launched an online Reasonable Accommodations Request form and continue to provide fair housing information through newsletters. The Language Access Plan (LAP) update was completed, and outreach continues to be conducted in all languages listed in the updated LAP. In June 2024, AHA partnered with Alameda Municipal Power (AMP) to help program participants living in AHA-owned properties auto-enroll in the Energy Assistance Program, resulting in monthly savings for these households.

#### GOAL 7: EXPAND HOUSING CHOICE THROUGHOUT THE CITY OF ALAMEDA.



	<p>The board and staff continue to review options for expanding the Authority's portfolio of affordable housing units. In April 2023, the Pulte Homes townhomes were fully purchased. In addition, the AHA stepped in to avoid foreclosure on a moderate-income inclusionary unit, taking ownership so that this home would retain the affordability restrictions. The Housing Development Department continues to work on Estuary I, Estuary II, and Linnet Corner (collectively referred to as the North Housing Project). Estuary I will open in 2025 and will provide 45 units of permanent supportive housing for formerly homeless individuals (including an AHAP of 40 PBVs). Linnet Corner will also open in 2025 and will provide 64 affordable units of which 16 units will be for homeless veterans (including an AHAP of 40 PBVs). AHA is still securing funding for Estuary II which will provide 46 units of permanent supportive housing for formerly homeless individuals (selected for an award of 40 PBVs). Rosefield achieved 100% lease up of its tax credit units (89 units, including 23 project-based voucher units) as of October 31, 2022. Permanent Loan Conversion for Rosefield Village occurred in September 2023. In March 2023, 200 applicants were selected from the Housing Choice Voucher (HCV) waitlist and to date AHA staff have issued 71 vouchers. In March 2023, there was a ceremonial signing event at Rica Vista Apartments which preserves the affordability of up to 132 units at Rica Vista Apartments for the next 55 years which was a collaborative effort between the AHA, the City of Alameda, and Lincoln Avenue Capital. On June 5, 2023, the AHA was notified it was receiving an allocation of ten (10) Stability Vouchers (SV) effective July 1, 2023. Early in 2024, AHA partnered with the Housing Authority of the County of Alameda (HACA), the Oakland Housing Authority (OHA), and the Department of Veteran Affairs, to get HUD approval to successfully reallocate 36 VASH (Veteran Affairs Supportive Housing) vouchers to the AHA. In 2021, the Authority was awarded fifty-seven (57) Emergency Housing Vouchers (EHV) from HUD, 52 of which remain utilized due to the sunset of the program. The Housing Authority of the City of Alameda (AHA) has implemented a Restore Rebuild, formerly known as Faircloth to RAD (Rental Assistance Demonstration), conversion to utilize all its 120-unit Faircloth limit at Independence Plaza, aiming to lease up fully in 2025. Conversions of these units are set to begin December 2024 pending HUD approval of the Public Housing and RAD closing documents. Additionally, the AHA is also collaborating with the HUD Field Office and other Public Housing Authorities within the State of California to explore options to assume more Faircloth Authority or partner with those PHAs to develop their Faircloth Authority. In October 2023, two Agreements to Enter into Housing Assistance Payments (AHAP) Contracts were signed for Estuary I and Linnet Corner. In 2022 the Authority signed two Housing Assistance Payments (HAP) contracts for 40 units (23 at Rosefield Village and 17 at Eden Housing's Family site, The Starling). The Authority also completed two Request for Proposals resulting in the selection of an additional 160 units under the Project-Based Voucher program. During 2021, Housing Assistance Payments Contracts were signed on 50 new Project-Based Voucher (PBV) units including 25 under the Veteran Affairs Supportive Housing (VASH) program. The Authority plans to open several waitlists by end of year 2024 with opportunities to apply online and in-person through our main offices and partnering locations with LifeSTEPS and other community organizations.</p>
B.4	<b>Capital Improvements.</b> – Not Applicable
B.5	<p><b>Most Recent Fiscal Year Audit.</b></p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y   N   N/A  <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>(b) If yes, please describe:</p>
C.	<b>Other Document and/or Certification Requirements.</b>
C.1	<p><b>Resident Advisory Board (RAB) Comments.</b></p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y   N  <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p>

C.2	<b>Certification by State or Local Officials.</b>  <a href="#">Form HUD 50077-SL</a> , <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i> , must be submitted by the PHA as an electronic attachment to the PHA Plan.		
C.3	<b>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</b>  Form HUD-50077-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i> , must be submitted by the PHA as an electronic attachment to the PHA Plan.		
C.4	<b>Challenged Elements.</b> If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA’s response to the public. (a) Did the public challenge any elements of the Plan? <div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <input type="checkbox"/> Y    <input type="checkbox"/> N </div> <input type="checkbox"/> <input type="checkbox"/> Will update if any items have been challenge during the public comment period.  If yes, include Challenged Elements. </div>		
<b>D. Affirmatively Furthering Fair Housing (AFFH).</b>			
D.1	<b>Affirmatively Furthering Fair Housing (AFFH).</b>  Provide a statement of the PHA’s strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.		
<table border="1" style="width: 100%;"> <tr> <td style="background-color: #e0e0e0;"><b>Fair Housing Goal: Not Applicable</b></td> </tr> <tr> <td><u>Describe fair housing strategies and actions to achieve the goal</u></td> </tr> </table>		<b>Fair Housing Goal: Not Applicable</b>	<u>Describe fair housing strategies and actions to achieve the goal</u>
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<u>Describe fair housing strategies and actions to achieve the goal</u>			

## Instructions for Preparation of Form HUD-50075-HCV Annual PHA Plan for HCV-Only PHAs

- A. **PHA Information.** All PHAs must complete this section. (24 CFR §903.4)
- A.1 Include the full **PHA Name**, **PHA Code**, **PHA Type**, **PHA Fiscal Year Beginning** (MM/YYYY), **Number of Housing Choice Vouchers (HCVs)**, **PHA Plan Submission Type**, and the **Availability of Information**, specific location(s) of all information relevant to the public hearing and proposed PHA Plan.
- PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table. ([24 CFR §943.128\(a\)](#))
- B. **Plan Elements.** All PHAs must complete this section. ([24 CFR §903.11\(c\)\(3\)](#))
- B.1 **Revision of Existing PHA Plan Elements.** PHAs must:
- Identify specifically which plan elements listed below that have been revised by the PHA. To specify which elements have been revised, mark the “yes” box. If an element has not been revised, mark “no.”

☐ **Statement of Housing Needs and Strategy for Addressing Housing Needs.** Provide a statement addressing the housing needs of low-income, very low-income and extremely low-income families and a brief description of the PHA's strategy for addressing the housing needs of families who reside in the jurisdiction served by the PHA and other families who are on the Section 8 tenant-based assistance waiting lists. The statement must identify the housing needs of (i) families with incomes below 30 percent of area median income (extremely low-income); (ii) elderly families (iii) households with individuals with disabilities, and households of various races and ethnic groups residing in the jurisdiction or on the public housing and Section 8 tenant-based assistance waiting lists. The statement of housing needs shall be based on information provided by the applicable Consolidated Plan, information provided by HUD, and generally available data. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. Once the PHA has submitted an Assessment of Fair Housing (AFH), which includes an assessment of disproportionate housing needs in accordance with 24 CFR 5.154(d)(2)(iv), information on households with individuals with disabilities and households of various races and ethnic groups residing in the jurisdiction or on the waiting lists no longer needs to be included in the Statement of Housing Needs and Strategy for Addressing Housing Needs. (24 CFR § 903.7(a)).

The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. (24 CFR §903.7(a)(2)(i)) Provide a description of the ways in which the PHA intends, to the maximum extent practicable, to address those housing needs in the upcoming year and the PHA's reasons for choosing its strategy. (24 CFR §903.7(a)(2)(ii))

☐ **Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.** A statement of the PHA's policies that govern resident or tenant eligibility, selection and admission including admission preferences for HCV. (24 CFR §903.7(b))

☐ **Financial Resources.** A statement of financial resources, including a listing by general categories, of the PHA's anticipated resources, such as PHA HCV funding and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program and state the planned use for the resources. (24 CFR §903.7(c))

☐ **Rent Determination.** A statement of the policies of the PHA governing rental contributions of families receiving tenant-based assistance, discretionary minimum tenant rents, and payment standard policies. (24 CFR §903.7(d))

☐ **Operation and Management.** A statement that includes a description of PHA management organization, and a listing of the programs administered by the PHA. (24 CFR §903.7(e)).

☐ **Informal Review and Hearing Procedures.** A description of the informal hearing and review procedures that the PHA makes available to its applicants. (24 CFR §903.7(f))

☐ **Homeownership Programs.** A statement describing any homeownership programs (including project number and unit count) administered by the agency under section 8y of the 1937 Act, or for which the PHA has applied or will apply for approval. (24 CFR §903.7(k))

☐ **Self Sufficiency Programs and Treatment of Income Changes Resulting from Welfare Program Requirements.** A description of any PHA programs relating to services and amenities coordinated, promoted, or provided by the PHA for assisted families, including those resulting from the PHA's partnership with other entities, for the enhancement of the economic and social self-sufficiency of assisted families, including programs provided or offered as a result of the PHA's partnerships with other entities, and activities subject to Section 3 of the Housing and Community Development Act of 1968 (24 CFR Part 135) and under requirements for the Family Self-Sufficiency Program and others. Include the program's size (including required and actual size of the FSS program) and means of allocating assistance to households. (24 CFR §903.7(l)(i)) Describe how the PHA will comply with the requirements of section 12(c) and (d) of the 1937 Act that relate to treatment of income changes resulting from welfare program requirements. (24 CFR §903.7(l)(iii)).

☐ **Substantial Deviation.** PHA must provide its criteria for determining a "substantial deviation" to its 5-Year Plan. (24 CFR §903.7(r)(2)(i))

☐ **Significant Amendment/Modification.** PHA must provide its criteria for determining a "Significant Amendment or Modification" to its 5-Year and Annual Plan.

If any boxes are marked "yes", describe the revision(s) to those element(s) in the space provided.

**B.2 New Activities.** This section refers to new capital activities which is not applicable for HCV-Only PHAs.

**B.3 Progress Report.** For all Annual Plans following submission of the first Annual Plan, a PHA must include a brief statement of the PHA's progress in meeting the mission and goals described in the 5-Year PHA Plan. (24 CFR §903.11(c)(3), 24 CFR §903.7(r)(1))

**B.4 Capital Improvements.** This section refers to PHAs that receive funding from the Capital Fund Program (CFP) which is not applicable for HCV-Only PHAs

**B.5 Most Recent Fiscal Year Audit.** If the results of the most recent fiscal year audit for the PHA included any findings, mark "yes" and describe those findings in the space provided. (24 CFR §903.7(p))

## C. Other Document and/or Certification Requirements.

**C.1 Resident Advisory Board (RAB) comments.** If the RAB had comments on the annual plan, mark "yes," submit the comments as an attachment to the Plan and describe the analysis of the comments and the PHA's decision made on these recommendations. (24 CFR §903.13(c), 24 CFR §903.19)

**C.2 Certification by State of Local Officials.** Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan. (24 CFR §903.15). Note: A PHA may request to change its fiscal year to better coordinate its planning with planning done under the Consolidated Plan process by State or local officials as applicable.

**C.3 Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.** Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed*. Form HUD-50077-ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed* must be submitted by the PHA as an electronic attachment to the PHA Plan. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the certification requirement to affirmatively further fair housing if the PHA fulfills the requirements of §§ 903.7(o)(1) and 903.15(d) and: (i) examines its programs or proposed programs; (ii) identifies any fair housing issues and contributing factors within those programs, in accordance with 24 CFR 5.154; or 24 CFR 5.160(a)(3) as applicable (iii) specifies actions and strategies designed to address contributing factors, related fair housing issues, and goals in the applicable Assessment of Fair Housing consistent with 24 CFR 5.154 in a reasonable manner in view of the resources available; (iv) works with jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; (v) operates programs in a manner consistent with any applicable consolidated plan under 24 CFR part 91, and with any order or agreement, to comply with the authorities specified in paragraph (o)(1) of this section; (vi) complies with any contribution or consultation requirement with respect to any applicable AFH, in accordance with 24 CFR 5.150 through 5.180; (vii) maintains records reflecting these analyses, actions, and the results of these actions; and (viii) takes steps acceptable to HUD to remedy known fair housing or civil rights violations, impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction's initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. (24 CFR §903.7(o)).

**C.4 Challenged Elements.** If any element of the Annual PHA Plan or 5-Year PHA Plan is challenged, a PHA must include such information as an attachment to the Annual PHA Plan or 5-Year PHA Plan with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.

**D. Affirmatively Furthering Fair Housing (AFFH).**

**D.1 Affirmatively Furthering Fair Housing.** The PHA will use the answer blocks in item D.1 to provide a statement of its strategies and actions to implement each fair housing goal outlined in its accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5) that states, in relevant part: "To implement goals and priorities in an AFH, strategies and actions shall be included in program participants' ... PHA Plans (including any plans incorporated therein) .... Strategies and actions must affirmatively further fair housing. ...." Use the chart provided to specify each fair housing goal from the PHA's AFH for which the PHA is the responsible program participant – whether the AFH was prepared solely by the PHA, jointly with one or more other PHAs, or in collaboration with a state or local jurisdiction – and specify the fair housing strategies and actions to be implemented by the PHA during the period covered by this PHA Plan. If there are more than three fair housing goals, add answer blocks as necessary.

Until such time as the PHA is required to submit an AFH, the PHA will not have to complete section D., nevertheless, the PHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015, which means that it examines its own programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; and maintain records reflecting these analyses and actions. Furthermore, under Section 5A(d)(15) of the U.S. Housing Act of 1937, as amended, a PHA must submit a civil rights certification with its Annual PHA Plan, which is described at 24 CFR 903.7(o)(1) except for qualified PHAs who submit the Form HUD-50077-CR as a standalone document.

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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the Annual PHA Plan. The Annual PHA Plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public for serving the needs of low- income, very low- income, and extremely low- income families.

Public reporting burden for this information collection is estimated to average 6.02 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**Privacy Act Notice.** The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality

## **NOTE FROM THE HOUSING AUTHORITY OF THE CITY OF ALAMEDA**

The Housing Authority of the City of Alameda (AHA) will be submitting form HUD-50075-MTW electronically through the Moving to Work (MTW) portal to HUD upon approval of its Board of Commissioners after a public process. Please find the original form HUD-50075-MTW on HUD's website at:

[https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/ph/mtw/expansion/mtwsupplement](https://www.hud.gov/program_offices/public_indian_housing/programs/ph/mtw/expansion/mtwsupplement). This document contains the information in the HUD form, but in an easier to read format, including larger print in a format that will be accessible to persons with disabilities when posted online. Most of the instructions and questions in the document are copied directly from the form HUD-50075-MTW (01/2021).

## **EXPLANATORY NOTE TO PUBLIC REVIEWERS OF THE PROPOSED MOVING TO WORK SUPPLEMENT FILLABLE FORM**

The Moving to Work (MTW) Supplement collects information about policies implemented by MTW expansion agencies. MTW agencies use it to communicate their plans with residents and community stakeholders through required public comment processes, and HUD uses the information collected to monitor and evaluate the MTW demonstration program. MTW agencies will submit the MTW Supplement to HUD annually and amend as needed. HUD plans to make the MTW Supplement into a fillable form so as to reduce respondent burden and make the information collected more useful to HUD. When the MTW Supplement is available through the fillable form, it will include skip patterns<sup>1</sup> that prompt the user to populate only the sections relevant to what they are currently implementing. It will also include screening questions that will ask which waivers and associated activities they are currently implementing, plan to implement in the upcoming year, or will be discontinued in the submission year. The MTW Agency will be able to print the information from the MTW Supplement in a reader-friendly format in order to inform the public of its plans for the upcoming year. The purposes of the MTW Supplement are two-fold: it reports to HUD what is happening at the local level in a way that the Department can monitor and evaluate; and, more importantly, it informs the public about what the agency is planning and gives the public the ability to provide comment.

The MTW Supplement asks for information about each of the MTW Waivers and associated activities that are made possible by the MTW Operations Notice, Safe Harbor Waivers and Agency-Specific Waivers, and a few other types of information. MTW agencies will fill in information/data through a fillable form and the information collected will be stored in a database so that it can be analyzed by HUD. The approved forms will be posted to the MTW website for viewing by the public. For instance, it will be simple to find out how many MTW agencies and which MTW agencies are implementing each type of activity. It will also simplify reporting for the MTW agency since information will carry

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<sup>1</sup> A skip pattern is a question or series of questions associated with a conditional response.



over year-to-year in the fillable form so that information that does not change from year to year will be pre-populated, thereby reducing respondent burden.

This document lists the sections of the MTW Supplement and then presents the proposed questions to be included in the MTW Supplement for MTW agencies to answer annually. Throughout the online version, there will be a dropdown menu option that makes it clear as to which activities an agency is permitted to do within the safe harbors of the MTW Operations Notice, Appendix I, MTW Waivers.

### **Sections of the MTW Supplement:**

- A. PHA Information
- B. Narrative
- C. MTW Waivers and Associated MTW Activities
- D. Safe Harbor Waivers
- E. Agency-Specific Waivers
- F. Public Housing Operating Subsidy Grant Reporting
- G. MTW Statutory Requirements
- H. Evaluations
- I. MTW Certifications of Compliance

### **Information to be Collected for MTW Activities**

There are many MTW activities, subject to limitations as outlined in the MTW Operations Notice, that an MTW agency may implement. Each MTW agency will likely only engage in a subset of these MTW activities. The MTW Supplement will first ask MTW agencies to identify which MTW activities they are proposing to implement and which of those MTW activities they are already implementing. MTW agencies will subsequently be asked to provide information only about the MTW activities they are proposing to implement or are already implementing. This feature will reduce respondent burden. MTW waivers have associated MTW activities. MTW agencies are also able to combine MTW activities into their own initiatives.

MTW agencies will be asked for specific information about each MTW activity they are proposing to implement or are already implementing. There are six types of questions that could be asked about each MTW activity. The exact mix of questions will depend partly upon the MTW activity and partly upon the requirements for that MTW activity listed in the MTW Operations Notice. The six types of questions are:

- (1) Core—questions applicable to most MTW activities
- (2) Custom—questions specific to an individual MTW activity
- (3) Safe Harbor Waiver—questions asked when the MTW activity requires a Safe Harbor Waiver
- (4) Hardship Policy—questions asked when the MTW Operations Notice requires a hardship policy for the MTW activity
- (5) Impact Analysis—questions asked when the MTW Operations Notice requires an impact analysis for the MTW activity

(6) Agency-Specific Waiver—questions asked when the MTW activity requires an Agency-Specific Waiver

## Questions

The questions are presented below by type, beginning with the core questions. In the final online version of the MTW Supplement, the relevant questions from each type will be asked together in relation to each MTW activity the MTW agency is proposing to implement or is already implementing. The final online version of the MTW Supplement will be set up to allow for different versions of the same MTW activity—for instance, a different minimum rent for the non-elderly/non-disabled than for the elderly/disabled. The final online version of the MTW Supplement will also be able to autofill items with information from previous years. This feature will reduce respondent burden.

Table 1, at the end of this document, lists the MTW activities and indicates which types of questions need to be asked about each one.

## MTW SUPPLEMENT TO THE ANNUAL PHA PLAN

U.S. Department of Housing and Urban Development Office of Public and Indian Housing

OMB. No. 2577-0226

Expires: 03/31/2024

**Purpose.** The Moving to Work (MTW) Supplement to the Annual PHA Plan informs HUD, families served by the PHA, and members of the public, about the MTW Waivers and associated activities that the MTW agency seeks to implement in the coming Fiscal Year and updates the status of MTW activities that have been previously approved. It also provides information about Safe Harbor Waivers, Agency-Specific Waivers, compliance with MTW statutory requirements, and evaluations. The MTW Supplement does not replace the PHA Plan. MTW agencies must continue to submit the applicable PHA Plan. MTW agencies that are not required to submit annual PHA Plans under the Housing and Economic Recovery Act of 2008 (HERA) must submit the MTW Supplement annually, in addition to holding public hearings, obtaining board approval, and consulting with Resident Advisory Boards (RABs) and tenant associations, as applicable, on planned MTW activities.

**Applicability.** Form HUD-50075-MTW is to be completed annually by all MTW agencies brought onto the MTW Demonstration Program pursuant to Section 239 of the Fiscal Year 2016 Appropriations Act, P.L. 114-113 (2016 MTW Expansion Statute) or legacy MTW agencies that chose to follow the requirements of the MTW Operations Notice.

**Definitions.** All terms used in this MTW Supplement are consistent with the definitions stated in the MTW Operations Notice, including:

- (1) **Local, Non-Traditional Activities (LNT)** – Those MTW activities that use MTW funding flexibility outside of the Housing Choice Voucher (HCV) and public housing programs established in Sections 8 and 9 of the U.S. Housing Act of 1937.

- (2) **Safe Harbors** – The additional parameters or requirements, beyond those specified in the MTW activity description itself found in the MTW Operations Notice, following each activity description, that the MTW agency must follow in implementing MTW activities.
- (3) **Substantially the Same Requirement** – A statutory MTW requirement that MTW agencies must continue to assist substantially the same total number of eligible low-income families as would have been served absent the MTW demonstration.

## A. PHA INFORMATION

- A.1 **PHA Name:** Housing Authority of the City of Alameda  
**PHA Code:** CA062  
**MTW Supplement for PHA Fiscal Year Beginning (MM/DD/YYYY):**  
07/01/2025  
**PHA Program Type:** ☐ Public Housing (PH) only  
☒ Housing Choice Voucher (HCV) only  
☐ Combined  
**MTW Cohort Number:** 4 (Landlord Incentives)  
**MTW Supplement Submission Type:**  
☐ Annual Submission  
☒ Amended Annual Submission

## B. NARRATIVE

### B.1 MTW Supplemental Narrative.

The narrative provides the MTW agency with an opportunity to explain to the public, including the families that it serves, its MTW plans for the fiscal year and its short and long-term goals.

The MTW agency should provide a description of how it seeks to further the three MTW statutory objectives during the coming Fiscal Year. Those three MTW statutory objectives are: (1) to reduce cost and achieve greater cost effectiveness in federal expenditures; (2) to give incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining employment and becoming economically self-sufficient; and (3) to increase housing choices for low-income families.

The Housing Authority of the City of Alameda (AHA) advocates for and provides quality, affordable, safe housing; encourages self-sufficiency; and builds community



partnerships. AHA's Vision Statement is: "The Housing Authority of the City of Alameda shall continue to be recognized for creatively seeking ways to expand the availability of affordable housing throughout Alameda, for caring professional staff, and excellent service."

During participation in the Landlord Incentives Cohort the AHA will be using creative methods to encourage new landlord participation and continued landlord partnerships expanding housing choice for all voucher holders. During this cohort study, the AHA will continue to develop and maintain quality affordable housing for low-income residents, providing more housing choice along the entire spectrum of housing continuum. The AHA would like to design, implement, and sustain exceptional programs that invest in the residents to become self-sufficient through an array of educational, employment, and economic platforms including exploring the possibility of offering incentives to families to participate in training programs or increasing the ability of participants to attend community college or universities.

The AHA will strive to further the MTW statutory objective to reduce cost and achieve greater cost effectiveness in federal expenditures by continuing the activities proposed for FY 2022-2023 such as moving to a triennial reexamination and inspection schedule and allowing for the self-certification of assets and continuing activities proposed for FY 2023-2024 such as increasing rents for PBV units at AHA's fiscal year rather than the contract's anniversary date.

The AHA will strive to further the MTW statutory objective to give incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining employment and becoming economically self-sufficient by continuing the activities proposed for FY 2022-2023.

The AHA proposes to use MTW funds flexibly to increase housing choice through acquisition, rehabilitation, and/or development. AHA may use MTW funds flexibly to make Restore-Rebuild (formerly known as Faircloth-to-RAD) transactions feasible by supplementing the RAD rents as housing assistance payments or to pay for acquisition, rehabilitation or construction costs or contributing to development costs in another manner. The AHA is increasing housing choices for low-income families by using its 120-unit Restore-Rebuild authorization to produce additional project-based vouchers at Independence Plaza. The AHA will accept the Faircloth limit as offered by other jurisdictions to expand affordable housing by using these Faircloth limits in a manner similarly to the AHA's limit with Restore-Rebuild with additional MTW funds.

Effective January 1, 2024, MTW Activity 2022-01 2.b. Payment Standards – Fair Market Rents (HCV) was applied to Veteran Affairs Supportive Housing (VASH), Stability Voucher (SV), and Emergency Housing Choice Voucher (EHV) participants. On February 19, 2025, the AHA received approval from the Department of Housing and Urban Development (HUD) to apply MTW flexibilities under MTW Activity 2022-15 1.w. Alternative Income Inclusions/Exclusions (HCV), MTW Activity 2022-03 3.d. Self-Certification of Assets, and MTW Activity 2022-07 5.d. Alternative Inspection

Schedule to its VASH, EHV, and SV programs. In the same letter of approval, the AHA received approval to apply MTW flexibilities under MTW Activity 2022-06 5.a. Pre-Qualifying Unit Inspections to its EHV and SV programs (AHA doesn't need MTW approval to apply this activity to the VASH program as it is already allowed under the revised HUD-VASH Operating Requirements). After receiving approval from its Board of Commissioners, the AHA plans to implement the approvals received in its February 19, 2025 letter from HUD starting on April 17, 2025.

## **C. MTW WAIVERS AND ASSOCIATED ACTIVITIES**

**NOTE: MTW agencies are reminded that all MTW Waivers and associated activities must be implemented in accordance with the MTW Operations Notice and within its safe harbors unless a Safe Harbor or Agency-Specific Waiver approval is provided by HUD, in which case, the activity utilizing the Safe Harbor or Agency-Specific Waiver must be implemented in accordance with the terms of the approval.**

### **Screeners:**

For all MTW Waivers and Activities in Section C, the screening question listed below will be presented in the fillable form. This will allow the form to only display those waivers that input where is required.

Each waiver and activity will be listed with the following choices. If "Not Currently Implemented" is selected, the agency will not be shown any further questions for the activity.

- Currently Implementing
- Plan to Implement in the Submission Year
- Will be Discontinued in the Submission Year
- Was Discontinued in a previous Submission Year
- Not Currently Implemented

### **Core Questions:**

The following core questions apply to all of the MTW Waivers and associated activities listed in the MTW Operations Notice. The core questions collect basic information about any MTW activity proposed or implemented by MTW agencies.

- Narrative. Describe the MTW activity, the MTW agency's goal(s) for the MTW activity, and, if applicable, how the MTW activity contributes to a larger initiative.
- MTW Statutory Objectives. Which of the MTW statutory objectives does this MTW activity serve?
- Cost implications. What are the cost implications of this MTW activity? Pick the best description of the cost implications based on what you know today.

- Different policy by household status/family types/sites? Does the MTW activity under this waiver apply to all assisted households or only to a subset or subsets of assisted households?
- Household Status. Does the MTW activity apply only to new admissions, only to currently assisted households, or to both new admissions and currently assisted households?
- Family Types. Does the MTW activity apply to all family types or only to selected family types?
- Location. Depending on if responses are being provided for a public housing (PH) or HCV activity, the agency will either see questions applicable to PH or HCV.
- Does the MTW agency need a Safe Harbor Waiver to implement this MTW activity as described?
- Does this MTW activity require a hardship policy?
- Does the MTW activity require an impact analysis?

### Custom Questions:

Custom questions are tailored to each MTW activity. In what follows, the MTW activities are listed with their custom questions. The final online version of the MTW Supplement will be set up so that if an MTW activity is the same in the HCV and/or public housing programs, the MTW agency fills in the information for public housing, then the information is auto populated for the HCV program. MTW agencies are asked to fill in answers only to questions that are relevant to the MTW activities they propose to implement or are already implementing.

The Housing Authority of the City of Alameda (AHA) has previously submitted and been approved for the activities marked as “Currently Implementing”.

<b>1. Tenant Rent Policies</b>	
b. Tiered Rent (HCV)	Not Currently Implemented
d. Stepped Rent (HCV)	Not Currently Implemented
f. Minimum Rent (HCV)	Not Currently Implemented
h. Total Tenant Payment as a Percentage of Gross Income (HCV)	Not Currently Implemented
j. Alternative Utility Allowance (HCV)	Not Currently Implemented
l. Fixed Subsidy (HCV)	Not Currently Implemented
n. Utility Reimbursements (HCV)	Not Currently Implemented
o. Initial Rent Burden (HCV)	Not Currently Implemented
q. Impute Income (HCV)	Not Currently Implemented
s. Elimination of Deduction(s) (HCV)	Not Currently Implemented
u. Elimination of Deductions (HCV)	Not Currently Implemented
w. Alternative Income Inclusions/Exclusions (HCV)	Currently Implementing

<b>2. Payment Standards and Rent Reasonableness</b>	
a. Payment Standards – Small Area Fair Market Rents (FMR) (HCV)	Plan to Implement in the Submission Year
b. Payment Standards – Fair Market Rents (HCV)	Currently Implementing
c. Rent Reasonableness – Process (HCV)	Not Currently Implemented
d. Rent Reasonableness – Third Party Requirement	Not Currently Implemented

<b>3. Reexaminations</b>	
b. Alternative Reexamination Schedule for Households (HCV)	Currently Implementing
d. Self-certification of Assets (HCV)	Currently Implementing

<b>4. Landlord Leasing Incentives</b>	
a. Vacancy Loss (HCV-Tenant-Based Assistance)	Currently Implementing
b. Damage Claims (HCV-Tenant-Based Assistance)	Not Currently Implemented
c. Other Landlord Incentives (HCV-Tenant-Based Assistance)	Currently Implementing

<b>5. Housing Quality Standards (HQS)</b>	
a. Pre-Qualifying Unit Inspections (HCV)	Currently Implementing
b. Reasonable Penalty Payments for Landlords (HCV)	Not Currently Implemented
c. Third-Party Requirement (HCV)	Not Currently Implemented
d. Alternative Inspection Schedule (HCV)	Currently Implementing

<b>6. Short-Term Assistance</b>	
b. Short-Term Assistance (HCV)	Not Currently Implemented

<b>7. Term-Limited Assistance</b>	
b. Term-Limited Assistance (HCV)	Not Currently Implemented

<b>8. Increase Elderly Age (PH &amp; HCV)</b>	
a. Increase Elderly Age (HCV)	Not Currently Implemented

<b>9. Project-Based Voucher Program Flexibilities</b>	
a. Increase PBV Program Cap (HCV)	Currently Implementing
b. Increase PBV Project Cap (HCV)	Currently Implementing
c. Elimination of PBV Selection Process for PHA-Owned Projects without Improvement, Development, or Replacement (HCV)	Currently Implementing
d. Alternative PBV Selection Process (HCV)	Not Currently Implemented
e. Alternative PBV Unit Types (Shared Housing and Manufactured Housing) (HCV)	Not Currently Implemented
f. Increase PBV HAP Contract Length (HCV)	Not Currently Implemented
g. Increase PBV Rent to Owner (HCV)	Not Currently Implemented
h. Limit Portability for PBV Units (HCV)	Not Currently Implemented

<b>10. Family Self-Sufficiency Program with MTW Flexibility</b>	
a. HCV Waive Operating a Required FSS Program (HCV)	Not Currently Implemented
b. HCV Alternative Structure for Establishing Program Coordinating Committee (HCV)	Not Currently Implemented
c. HCV Alternative Family Selection Procedures (HCV)	Not Currently Implemented
d. HCV Modify or Eliminate the Contract of Participation (HCV)	Not Currently Implemented
e. HCV Policies for Addressing Increases in Family Income (HCV)	Not Currently Implemented

<b>11. MTW Self-Sufficiency Program</b>	
a. HCV Alternative Family Selection Procedures (HCV)	Not Currently Implemented
b. HCV Policies for Addressing Increases in Family Income (HCV)	Not Currently Implemented

<b>12. Work Requirement</b>	
b. Work Requirement (HCV)	Not Currently Implemented

<b>13. Use of Public Housing as an Incentive for Economic Progress (PH)</b>	Not applicable
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<b>14. Moving On Policy</b>	
a. Waive Initial HQS Inspection Requirement (HCV)	Not Currently Implemented

<b>14. Moving On Policy</b>	
b. HCV Allow Income Calculations from Partner Agencies (HCV)	Not Currently Implemented
c. HCV Aligning Tenant Rents and Utility Payments Between Partner Agencies (HCV)	Not Currently Implemented

<b>15. Acquisition without Prior HUD Approval (PH)</b>	Not applicable
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<b>16. Deconcentration of Poverty in Public Housing Policy (PH)</b>	Not applicable
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<b>17. Local, Non-Traditional Activities</b>	
a. Rental Subsidy Program	Not Currently Implemented
b. Service Provision	Not Currently Implemented
c. Housing Development Programs	Currently Implementing

Core and Custom Question Answers for Activities Plan to Implement in Submission Year or Currently Implemented:

<b>1.w. Alternative Income Inclusions/Exclusions (HCV)</b>
Currently Implementing
<p>ACTIVITY 2022-15: The AHA excludes the Guaranteed Basic Income Pilot Program, which is a City of Alameda initiative to provide a flat monthly cash payment of \$1,000 to approximately 150 low-income City of Alameda households over a two-year period called Rise Up Alameda. The AHA excludes these payments from the income review and rent calculation process of applicants or participants receiving these payments.</p> <p>The AHA will also exclude income from United Way Bay Area's (UWBA) Community-Based Roads to Prosperity program which is a privately funded guaranteed basic income (GBI) pilot program in Alameda County, California. Starting in late 2024, 100 families will be randomly selected from SparkPoint Centers based in Oakland, Fremont, and Hayward and provided \$18,000 in unconditional cash transfers over the course of 18 months.</p>
<p>This MTW activity serves the following statutory objectives:</p> <p><input type="checkbox"/> Cost effectiveness</p> <p><input checked="" type="checkbox"/> Self-sufficiency</p> <p><input type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p>

<b>1.w. Alternative Income Inclusions/Exclusions (HCV)</b>
<input checked="" type="checkbox"/> Increased expenditures <input type="checkbox"/> Decreased expenditures
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <input checked="" type="checkbox"/> to all assisted households <input type="checkbox"/> only to a subset or subsets of assisted households
<p>What inclusions or exclusions will be eliminated, modified, or added?</p> <p>Guaranteed Basic Income Pilot Program - City of Alameda called Rise Up Alameda and United Way Bay Area's (UWBA) Community-Based Roads to Prosperity program</p>
<p>This MTW activity does not require a Safe Harbor Waiver.</p>
<p>This MTW activity does not require a hardship policy.</p>
<p>This MTW activity does not require an impact analysis.</p>
<p>Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.</p> <p>The AHA implemented this activity on July 1, 2023 and payments for the Guaranteed Basic Income Pilot Program were distributed starting in October 2023. Of the 150 households that are a part of this pilot program, 44% or 67 participants receive rental assistance through the voucher program. Starting on April 17, 2025, the AHA plans to apply this activity to the VASH, EHV, and SV programs.</p>

<b>2.a. Payment Standards – Small Area Fair Market Rents (FMR) (HCV)</b>
Plan to Implement in the Submission Year
ACTIVITY 2025-01: The Housing Authority of the City of Alameda strives to provide families the option to find affordable housing in the City of Alameda which is split into 2 zip codes – 94501 and 94502. While both areas have good schools, high quality local businesses, picturesque neighborhoods, and a caring, involved community, zip code 94502 has more limited housing supply and higher housing costs than zip code 94501. Payment standards set between 80% to 150% of SAFMR will hopefully allow the market to cap rents through rent reasonableness testing and not the payment standards and provide families with more options when searching for affordable housing across the City of Alameda.
This MTW activity serves the following statutory objectives: <input type="checkbox"/> Cost effectiveness <input type="checkbox"/> Self-sufficiency <input checked="" type="checkbox"/> Housing Choice
This MTW activity has the following cost implications: <input type="checkbox"/> Neutral <input type="checkbox"/> Increased revenue <input type="checkbox"/> Decreased revenue <input checked="" type="checkbox"/> Increased expenditures <input type="checkbox"/> Decreased expenditures
A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies: <input checked="" type="checkbox"/> to all assisted households <input type="checkbox"/> only to a subset or subsets of assisted households
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does require a hardship policy. The Hardship policy is attached.
This MTW activity does require an impact analysis. The impact analysis is attached.
The impact analysis does not apply to more than this MTW activity.

<b>2.b. Payment Standards – Fair Market Rents (HCV)</b>
Currently Implementing
ACTIVITY 2022-01: The Housing Authority of the City of Alameda strives to house families in a small community in the Bay Area. The area is perceived to be one with good schools, high quality local businesses, picturesque neighborhoods, and a caring, involved community resulting in families wanting to rent or buy in the area resulting in high housing costs and limited housing choice. Payment standards set



<b>2.b. Payment Standards – Fair Market Rents (HCV)</b>
Currently Implementing
between 80% to 150% of FMR will hopefully allow the market to cap rents through rent reasonableness testing and not the payment standards.
If the payment standard amount is increased during the term of the HAP contract, the increased payment standard amount shall be used to calculate the monthly housing assistance payment for the family at the interim or regular reexamination, whichever comes first.
The Alameda Housing Authority has Waived: 24 CFR 982.505 (c) (4), which falls under 2.b. MTW waiver, 2.b. Payment Standards – Fair Market Rents (HCV). CFR982.503-505 and 983.301. This request will allow owners to request rent increases during the HAP contract and the payment standard to be updated to the current one if higher than the one used at the last annual.
Custom Question: Please explain the payment standards by FMR.
The agency may apply a payment standard between 80% and 150% of FMR.
This MTW activity serves the following statutory objectives: <input type="checkbox"/> Cost effectiveness <input type="checkbox"/> Self-sufficiency <input checked="" type="checkbox"/> Housing Choice
This MTW activity has the following cost implications: <input type="checkbox"/> Neutral <input type="checkbox"/> Increased revenue <input type="checkbox"/> Decreased revenue <input checked="" type="checkbox"/> Increased expenditures <input type="checkbox"/> Decreased expenditures
A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies: <input checked="" type="checkbox"/> to all assisted households <input type="checkbox"/> only to a subset or subsets of assisted households
This MTW activity does require a Safe Harbor Waiver.
This MTW activity does require a hardship policy. Hardship policy will be uploaded here, but please see Payment Standards Outside FMR Hardship Policy.
The hardship policy does not apply to more than this MTW activity.
The MTW agency has not modified the hardship policy since the last submission of the MTW Supplement.
How many hardship requests have been received associated with this activity in the most recently completed PHA fiscal year?

<b>2.b. Payment Standards – Fair Market Rents (HCV)</b>
Currently Implementing
0 hardship requests received during the most recently completed PHA fiscal year.
This MTW activity does require an impact analysis. Impact analysis will be uploaded here, but please see Payment Standard Impact Analysis.
The impact analysis does not apply to more than this MTW activity.
Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.
The AHA implemented this activity on July 1, 2023 and since then the AHA went through the significant amendment process to allow increases in payment standards to be applied at the interim or regular reexamination, whichever comes first. In the most recently completed fiscal year (July 1, 2023 to June 30, 2024) the AHA kept payment standards at 120% of FMR.
This activity has not been discontinued and is not planned to be discontinued.

### 3.b. Alternative Reexamination Schedule for Households

#### Currently Implementing

ACTIVITY 2022-02: The AHA has switched to a triennial reexamination schedule for all households except families receiving zero income or less than \$5,000 per adult annually in income, VASH, SV or EHV participants who will receive annual recertifications. AHA will check for families meeting the zero income conditions twice a year (normally January and July) and schedule an annual reexamination as appropriate.

Households are only allowed 1 interim reexamination every calendar year for an income decrease of more than 10% from the reexamination or interim, whichever was conducted last.

Increases and cumulative increases between regular reexaminations resulting in more than a 10% income increase need to be reported when the 10% level is reached.

If the payment standard increases when an interim is conducted, the AHA will use the new payment standard to be effective at the interim effective date as allowed under HOTMA.

Custom Question: What is the recertification schedule?

- ☐ Once every two years  
☒ Once every three years  
☐ Other

Custom Question: How many interim recertifications per year may a household request?

- ☐ 0  
☒ 1  
☐ 2 or more

Custom Question: Please describe briefly how the MTW agency plans to address changes in family/household circumstances under the alternative reexamination schedule.

The AHA is limiting households to one interim per calendar year if the household gross income has decreased by 10% or more.

If a household would like to receive an interim for an income decrease of less than 10% or has already received an interim in the calendar year and would like a second interim, the household may submit a hardship request if:

- The family has experienced a decrease in income because of changed circumstances, including loss or reduction of employment, death in the family, or reduction in or loss of earnings other assistance; OR
- The family has experienced an increase in expenses, because of changed circumstances, for medical costs, childcare, transportation, education, or similar items.

<b>3.b. Alternative Reexamination Schedule for Households</b>
<p>This MTW activity serves the following statutory objectives:</p> <p><input checked="" type="checkbox"/> Cost effectiveness</p> <p><input checked="" type="checkbox"/> Self-sufficiency</p> <p><input type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p> <p><input checked="" type="checkbox"/> Increased expenditures</p> <p><input type="checkbox"/> Decreased expenditures</p>
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <p><input type="checkbox"/> to all assisted households</p> <p><input checked="" type="checkbox"/> only to a subset or subsets of assisted households</p> <p>Does not apply to VASH, SV, or EHV participants.</p>
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does require a hardship policy Alternative Reexamination Schedule Hardship Policy.
The hardship policy does not apply to more than this MTW activity.
The MTW agency has not modified the hardship policy since the last submission of the MTW Supplement.
<p>How many hardship requests have been received associated with this activity in the most recently completed PHA fiscal year?</p> <p>1 hardship request was received during the most recently completed PHA fiscal year (July 1, 2023 to June 30, 2024). The request was approved and the interim was processed.</p>
This MTW activity does require an impact analysis. Impact analysis will be uploaded here, but please see Alternative Reexamination Schedule Impact Analysis.
<p>Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.</p> <p>The AHA implemented this activity on July 1, 2023. Since then, the AHA has been working to spread out reexaminations across the 3-year reexamination cycle and plans to have this fully in place starting in the 2025 calendar year. Effective February 20, 2025, the AHA revised its hardship policy to be aligned with the requirements in the MTW Operations Notice.</p>
This activity has not been discontinued and is not planned to be discontinued.

<b>3.d. Self-Certification of Assets</b>
Currently Implementing
<p>ACTIVITY 2022-03: Allow self-certification of up to \$50,000 in assets for participants to reduce processing of minimal income from assets. Family must provide self-certification statement disclosing any income earned on the assets under penalty of perjury. No other verification will be collected or required. Assets are defined in 24 CFR 5.609. Assets that the family does not have access to such as irrevocable trusts and 401K accounts would not count towards this asset limit. Applicants must establish assets and provide verification of all assets regardless of amount.</p> <p>New assets under \$50,000 do not need to be reported between triennials for participants.</p>
Custom Question: Please state the dollar threshold for the self-certification of assets. Threshold: \$50,000.
<p>This MTW activity serves the following statutory objectives:</p> <p><input checked="" type="checkbox"/> Cost effectiveness</p> <p><input type="checkbox"/> Self-sufficiency</p> <p><input type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p> <p><input type="checkbox"/> Increased expenditures</p> <p><input checked="" type="checkbox"/> Decreased expenditures</p>
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <p><input checked="" type="checkbox"/> to all assisted households</p> <p><input type="checkbox"/> only to a subset or subsets of assisted households</p>
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does not require a hardship policy.
This MTW activity does not require an impact analysis.
<p>Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.</p> <p>The AHA implemented this activity on July 1, 2023, and since then staff has accepted self-certifications of assets less than \$50,000 where there is no income earned for participants. Staff will no longer be collecting verification on assets under \$50,000 for participants. Starting on April 17, 2025, the AHA plans to apply this activity to the VASH, EHV, and SV programs.</p>

**3.d. Self-Certification of Assets**

This activity has not been discontinued and is not planned to be discontinued.

**4.a. Vacancy Loss****Currently Implementing**

ACTIVITY 2022-04: This activity is to incentivize landlords to participate in the HCV program in combination with activities 2022-05, 2022-06, 2022-07, and 2022-11.

As these activities are implemented to increase landlord participation in the program, units that are required to house voucher holders such as Project-Based Voucher units, ones with a regulatory agreement on the units, Tax Credit units, or ones owned by the Housing Authority are not included in this activity.

This allows the AHA to make a payment up to one month's rent payment to any landlord, new or returning, whose unit was vacated by a participant of the Housing Choice Voucher program and is occupied by a different participant of the Housing Choice Voucher program. The payment would be capped at the reasonable rent to the owner minus any payments the owner received that month from any source. The payment would be made after the execution of the HAP contract.

Custom Question: Does this policy apply to certain types of units or to all units all HCV units or only certain types of units (for example, accessible units, units in low-poverty neighborhood, or units/landlords new to the HCV program?)

☐ To all units

☒ Certain types of units only

If certain types of units only, what types of units does this policy apply to?

☒ Accessible units

☐ Units in particular types of areas or neighborhoods

☐ Units/landlords new to the HCV program

☒ Other. Please describe briefly:

Does not apply to PHA owned, LIHTC units, PBV units, or units with regulatory agreements.

Custom Question: What is the maximum payment that can be made to a landlord under this policy?

One month rent

Custom Question: How many payments were issued under this policy in the most recently completed PHA fiscal year?

0

Custom Question: What is the total dollar value of payments issued under this policy in the most recently completed PHA fiscal year?

<b>4.a. Vacancy Loss</b>
\$0
<p>This MTW activity serves the following statutory objectives:</p> <p><input type="checkbox"/> Cost effectiveness</p> <p><input type="checkbox"/> Self-sufficiency</p> <p><input checked="" type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p> <p><input checked="" type="checkbox"/> Increased expenditures</p> <p><input type="checkbox"/> Decreased expenditures</p>
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <p><input type="checkbox"/> to all assisted households</p> <p><input checked="" type="checkbox"/> only to a subset or subsets of assisted households</p>
<p>A MTW activity can apply only to new admissions, only to currently assisted households, or to both new admissions and currently assisted households. This MTW activity applies to:</p> <p><input type="checkbox"/> New admissions (i.e., applicants) only</p> <p><input type="checkbox"/> Currently assisted households only</p> <p><input checked="" type="checkbox"/> New admissions and currently assisted households</p>
<p>A MTW activity can apply to all family types or only selected family types. This MTW activity applies to:</p> <p><input checked="" type="checkbox"/> all family types</p> <p><input type="checkbox"/> only to selected family types</p>
<p>An MTW activity can apply to a tenant-based and or project-based voucher.</p> <p><input type="checkbox"/> The MTW activity applies to all tenant-based units.</p> <p><input type="checkbox"/> The MTW activity applies to all properties with project-based vouchers.</p> <p><input checked="" type="checkbox"/> The MTW activity applies to specific tenant-based units and/or properties with project-based vouchers. The description of which tenant-based units and/or properties with project-based vouchers that will participate in this MTW activity is:</p> <p>It does not apply to PHA owned, LIHTC units, units with regulatory agreements, or Project-Based Voucher units</p>
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does not require a hardship policy.
This MTW activity does not require an impact analysis.
Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.

#### **4.a. Vacancy Loss**

The AHA implemented this activity on July 1, 2023 but has not made any payments under this policy in the last fiscal year.

This activity has not been discontinued and is not planned to be discontinued.

#### **4.c. Other Landlord Incentives**

##### **Currently Implementing**

ACTIVITY 2022-05: This activity to incentivize landlords to participate in the HCV program in combination with activities 2022-04, 2022-06, 2022-07, and 2022-11.

As these activities are implemented to increase landlord participation in the program, units that are required to house voucher holders such as Project-Based Voucher units, ones with a regulatory agreement on the units, Tax Credit units, or ones owned by the Housing Authority are not included in this activity.

This activity allows the AHA to pay the landlord an incentive to lease up a Housing Choice Voucher (HCV) program participant. The AHA would offer an array of incentives, but the total incentive paid to one landlord could not exceed more than one month of the contract rent of the unit and would be paid at the time of HAP execution.

The incentives are:

First-time Rental incentive: \$1,500

Accessible unit incentive: \$2,000

HQS incentive: \$100

Returning Landlord incentive: \$1,000

A first-time rental incentive would be paid to a landlord that is bringing a unit that has never been leased with the same landlord under the HCV program before. The accessible unit incentive would be paid to landlords providing a unit that meets or mostly meets the requirements for an ADA accessible unit to a family with a member with a disability. The HQS incentive would be paid to landlords whose unit passed an initial housing quality standards inspection the first time and resulted in a participant of the HCV program renting the unit. The returning landlord incentive would be paid to a landlord leasing a unit to an HCV participant that has been on the program prior.

Only one incentive will be given to a landlord, for the same participant in cases where the participant is transferring to a unit within the same complex within one year of occupancy at the original unit.

For individuals who are leasing in place, an incentive will only be provided if the individual was not previously a voucher holder.



#### 4.c. Other Landlord Incentives

Custom Question: Does this policy apply to certain types of units or to all units all HCV units or only certain types of units (for example, accessible units, units in low-poverty neighborhood, or units/landlords new to the HCV program?)

☐ To all units

☒ Certain types of units only

If certain types of units only, what types of units does this policy apply to?

☒ Accessible units

☐ Units in particular types of areas or neighborhoods

☒ Units/landlords new to the HCV program

☒ Other. Please describe briefly:

Does not apply to PHA owned, LIHTC units, units with regulatory agreements, or Project-Based Voucher units.

Custom Question: What is the maximum payment that can be made to a landlord under this policy?

One month rent

Custom Question: How many payments were issued under this policy in the most recently completed PHA fiscal year?

Between July 1, 2023 and June 30, 2024, 117 payments were issued under this policy – 61 for the HQS incentive, 44 for the returning landlord incentive, 73 for the first-time rental incentive and 0 for the accessible unit incentive.

Custom Question: What is the total dollar value of payments issued under this policy in the most recently completed PHA fiscal year?

Between July 1, 2023 and June 30, 2024, \$159,600 was paid out under this policy – \$6,100 for the HQS incentive, \$44,000 for the returning landlord incentive, \$109,500 for the first-time rental incentive and \$0 for the accessible unit incentive.

This MTW activity serves the following statutory objectives:

☐ Cost effectiveness

☐ Self-sufficiency

☒ Housing Choice

This MTW activity has the following cost implications:

☐ Neutral

☐ Increased revenue

☐ Decreased revenue

☒ Increased expenditures

☐ Decreased expenditures

A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:

☐ to all assisted households

☒ only to a subset or subsets of assisted households

#### **4.c. Other Landlord Incentives**

A MTW activity can apply only to new admissions, only to currently assisted households, or to both new admissions and currently assisted households. This MTW activity applies to:

- ☐ New admissions (i.e., applicants) only
- ☐ Currently assisted households only
- ☒ New admissions and currently assisted households

A MTW activity can apply to all family types or only selected family types. This MTW activity applies to:

- ☒ all family types
- ☐ only to selected family types

An MTW activity can apply to a tenant-based and or project-based voucher.

- ☒ The MTW activity applies to all tenant-based units.
- ☐ The MTW activity applies to all properties with project-based vouchers.
- ☐ The MTW activity applies to specific tenant-based units and/or properties with project-based vouchers. The description of which tenant-based units and/or properties with project-based vouchers that will participate in this MTW activity is:

Does not apply to PHA owned, LIHTC units, units with regulatory agreements, or Project-Based Voucher units.

This MTW activity does not require a Safe Harbor Waiver.

This MTW activity does not require a hardship policy.

This MTW activity does not require an impact analysis.

Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.

The AHA implemented this activity on July 1, 2023 and has not made any changes to the policy. As a result of this activity, the AHA has had more landlords who have shown an interest in leasing to housing program participants and has had 41 more landlords who have housed program participants.

This activity has not been discontinued and is not planned to be discontinued.

<b>5.a. Pre-Qualifying Unit Inspections</b>
Currently Implementing
<p>ACTIVITY 2022-06: This activity to incentivize landlords to participate in the AHA's voucher programs in combination with activities 2022-04, 2022-05, 2022-07, and 2022-11.</p> <p>Initial inspections of units can be conducted up to 90 days prior to unit lease-up to help incentivize landlords to participate in the HCV, PBV, EHV, and SV program and avoid delays in leasing. Participants or landlords can request a special (interim) inspection at any time.</p>
<p>Custom Question: How long is the pre-inspection valid for?</p> <p>90 days</p>
<p>This MTW activity serves the following statutory objectives:</p> <p><input type="checkbox"/> Cost effectiveness</p> <p><input type="checkbox"/> Self-sufficiency</p> <p><input checked="" type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input checked="" type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p> <p><input type="checkbox"/> Increased expenditures</p> <p><input type="checkbox"/> Decreased expenditures</p>
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <p><input checked="" type="checkbox"/> to all assisted households</p> <p><input type="checkbox"/> only to a subset or subsets of assisted households</p>
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does not require a hardship policy.
This MTW activity does not require an impact analysis.
<p>Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.</p> <p>The AHA implemented this activity on July 1, 2023 and has not made any changes to the policy. Between July 1, 2023 and June 30, 2024, 35 pre-qualifying inspections were conducted. Starting on April 17, 2025, the AHA plans to apply this activity to the EHV and SV programs.</p>
This activity has not been discontinued and is not planned to be discontinued.

<b>5.d. Alternative Inspection Schedule</b>
Currently Implementing
<p>ACTIVITY 2022-07: This activity to incentivize landlords to participate in the AHA's voucher programs in combination with activities 2022-04, 2022-05, 2022-06, and 2022-11.</p> <p>Require inspections only once every three years for units under the HCV, VASH, EHV, and SV programs. Participants and landlords can request a special (interim) inspection at any time. A special inspection can be initiated by the AHA if it receives indications that the family's unit is not in compliance with HQS.</p> <p>Inspections will be scheduled based on risk after July 1, 2025. The activity is being changed so all inspections will be based on the results of the prior inspection. If the unit passes the regular inspection the first time and does not require a reinspection, the next regular inspection will be scheduled for approximately three years later. Otherwise, if the unit does not pass the inspection the first time and requires a reinspection, the next regular inspection will be scheduled in approximately 12 months.</p>
<p>This MTW activity serves the following statutory objectives:</p> <p><input checked="" type="checkbox"/> Cost effectiveness</p> <p><input type="checkbox"/> Self-sufficiency</p> <p><input checked="" type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p> <p><input type="checkbox"/> Increased expenditures</p> <p><input checked="" type="checkbox"/> Decreased expenditures</p>
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <p><input type="checkbox"/> to all assisted households</p> <p><input checked="" type="checkbox"/> only to a subset or subsets of assisted households</p>
<p>A MTW activity can apply only to new admissions, only to currently assisted households, or to both new admissions and currently assisted households. This MTW activity applies to:</p> <p><input type="checkbox"/> New admissions (i.e., applicants) only</p> <p><input type="checkbox"/> Currently assisted households only</p> <p><input checked="" type="checkbox"/> New admissions and currently assisted households</p>
<p>A MTW activity can apply to all family types or only selected family types. This MTW activity applies to:</p> <p><input checked="" type="checkbox"/> all family types</p> <p><input type="checkbox"/> only to selected family types</p>

<b>5.d. Alternative Inspection Schedule</b>
<p>An MTW activity can apply to a tenant-based and or project-based voucher.</p> <p><input checked="" type="checkbox"/> The MTW activity applies to all tenant-based units.</p> <p><input type="checkbox"/> The MTW activity applies to all properties with project-based vouchers.</p> <p><input type="checkbox"/> The MTW activity applies to specific tenant-based units and/or properties with project-based vouchers. The description of which tenant-based units and/or properties with project-based vouchers that will participate in this MTW activity is:</p>
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does not require a hardship policy.
This MTW activity does not require an impact analysis.
<p>Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.</p> <p>The AHA implemented this activity on July 1, 2023. Starting on April 17, 2025, the AHA plans to apply this activity to the VASH, EHV and SV programs.</p>
This activity has not been discontinued and is not planned to be discontinued.

<b>9.a. Increase PBV Cap</b>
Currently Implementing
<p>ACTIVITY 2022-08: Assisted families in the Housing Choice Voucher program frequently inquire how to move to Project-Based Voucher (PBV) units and during the last wait list opening, numerous HCV families applied for the PBV wait lists indicating a desire to have a long-term contract with owners rather than a 1-year contract that can then be canceled with no reason. By project-basing more vouchers, more housing is secured for families without the threat of eviction.</p> <p>This activity would raise the cap for which the AHA could award Project-Based Voucher contracts. The AHA currently has selections and/or HAP contracts for its entire allocation of PBV under the current caps.</p>
<p>Custom Question: What percentage of total authorized HCV units will be authorized for project-basing?</p> <p>50% of the lower of either the total authorized units or annual budget authority</p>
<p>This MTW activity serves the following statutory objectives:</p> <p><input type="checkbox"/> Cost effectiveness</p> <p><input type="checkbox"/> Self-sufficiency</p> <p><input checked="" type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input checked="" type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p> <p><input type="checkbox"/> Increased expenditures</p> <p><input type="checkbox"/> Decreased expenditures</p>
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <p><input checked="" type="checkbox"/> to all assisted households</p> <p><input type="checkbox"/> only to a subset or subsets of assisted households</p>
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does not require a hardship policy.
This MTW activity does not require an impact analysis.
<p>Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.</p> <p>The activity is approved, but the AHA is still below the HUD PBV cap at this time.</p>
This activity has not been discontinued and is not planned to be discontinued.

<b>9.b. Increase PBV Project Cap</b>
Currently Implementing
ACTIVITY 2022-09: Allows more than the greater of 25 units or 25% of the units at a complex to receive Project-Based Voucher assistance. Under current regulations, units that are for the elderly or those providing supportive services are already exempt from this cap. This activity would allow units that may not be serving the above populations to go above the cap up to 100% of the units at a project.
This MTW activity serves the following statutory objectives: <input type="checkbox"/> Cost effectiveness <input type="checkbox"/> Self-sufficiency <input checked="" type="checkbox"/> Housing Choice
This MTW activity has the following cost implications: <input checked="" type="checkbox"/> Neutral <input type="checkbox"/> Increased revenue <input type="checkbox"/> Decreased revenue <input type="checkbox"/> Increased expenditures <input type="checkbox"/> Decreased expenditures
A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies: <input checked="" type="checkbox"/> to all assisted households <input type="checkbox"/> only to a subset or subsets of assisted households
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does not require a hardship policy.
This MTW activity does not require an impact analysis.
Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.
The activity is approved, but a HAP contract has not been signed using this activity in the previous fiscal year.
This activity has not been discontinued and is not planned to be discontinued.

**9.c. Elimination of PBV Selection Process for PHA-owned Projects without Improvement, Development, or Replacement**

Currently Implementing

ACTIVITY 2022-010: This activity allows the AHA to award project-based voucher units to a property owned by a single-asset entity (S.A.E.) of the AHA without engaging in a selection process. This would allow the AHA to award vouchers without the RFP to units in the AHA's portfolio that qualify for PBV after conducting a Subsidy Layering Review, ensuring the property is compliant with HUD's site selection requirements, and having a 3<sup>rd</sup> party conduct HQS inspections of the units.

This MTW activity serves the following statutory objectives:

- ☒ Cost effectiveness
- ☐ Self-sufficiency
- ☐ Housing Choice

This MTW activity has the following cost implications:

- ☐ Neutral
- ☐ Increased revenue
- ☐ Decreased revenue
- ☐ Increased expenditures
- ☒ Decreased expenditures

A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:

- ☐ to all assisted households
- ☒ only to a subset or subsets of assisted households

A MTW activity can apply only to new admissions, only to currently assisted households, or to both new admissions and currently assisted households. This MTW activity applies to:

- ☐ New admissions (i.e., applicants) only
- ☐ Currently assisted households only
- ☒ New admissions and currently assisted households

A MTW activity can apply to all family types or only selected family types. This MTW activity applies to:

- ☒ all family types
- ☐ only to selected family types
- ☐ Other – another specifically defined target population or populations. The description of this population is:

An MTW activity can apply to a tenant-based and or project-based voucher.

- ☐ The MTW activity applies to all tenant-based units.
- ☐ The MTW activity applies to all properties with project-based vouchers.
- ☒ The MTW activity applies to specific tenant-based units and/or properties with project-based vouchers. The description of which tenant-based units and/or properties with project-based vouchers that will participate in this MTW activity is:



**9.c. Elimination of PBV Selection Process for PHA-owned Projects without Improvement, Development, or Replacement**

Applies only to units owned by a single-asset entity of the PHA.

This MTW activity does not require a Safe Harbor Waiver.

This MTW activity does not require a hardship policy.

This MTW activity does not require an impact analysis.

Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.

The activity has been approved, but an award has not been made at this time.

This activity has not been discontinued and is not planned to be discontinued.

**17.c. Housing Development Programs****Currently Implementing**

The Housing Authority of the City of Alameda (AHA) intends to use MTW fungibility to acquire, renovate and/or build affordable units that are not public housing units. Eligible activities may include gap financing or construction costs for development of affordable housing, conducted by the PHA or a PHA-controlled affiliate or by a non-PHA affordable housing developer, including but not limited to development of project-based voucher units, tax credit units, or affordable units funded with any other local, state, or federal funds.

The AHA will not spend more than 10% of its HAP budget on local, non-traditional activities and families receiving housing or services through local, non-traditional activities must meet the definition of low-income. Local, non-traditional development activities will be conducted in accordance with the applicable requirements of PIH Notice 2011-45 and the MTW Operations Notice. The Agency shall comply with Safe Harbor provisions requiring compliance with Section 30 of the 1937 Housing Act and that any MTW Funding awarded to a third-party provider must be competitively awarded.

At this time AHA would like to provide up to \$1 million of its funding, which would be about 3% of the AHA's HAP Budget, as gap financing to build affordable units for low-income individuals in the City of Alameda.

**Custom Questions**

Name and Address of Development

North Housing Master Plan -  
501 Mosely Avenue,  
Alameda, CA 94501

MTW Role: Acquisition, Rehabilitation, New Construction?

New Construction

Type of MTW Agency Financing: Gap Financing, Tax Credit Partnership, Other

Mid-term predevelopment  
financing (up to 15 years)

<b>17.c. Housing Development Programs</b>	
Number of Affordable Units	A minimum of 284 units. There are a minimum of 568 units planned. We hope more affordability can be achieved, but that is still being determined.
Number of Units by Affordability	
<ul style="list-style-type: none"> <li>80% of AMI</li> </ul>	Minimum of 132 at or below 80% AMI. We hope more affordability can be achieved, but that is still being determined.
<ul style="list-style-type: none"> <li>60% of AMI</li> </ul>	0 units
<ul style="list-style-type: none"> <li>30% of AMI</li> </ul>	127 units
<ul style="list-style-type: none"> <li>Other</li> </ul>	25 units at 40% AMI and 106 units will serve formerly homeless populations.
This MTW activity serves the following statutory objectives: <input type="checkbox"/> Cost effectiveness <input type="checkbox"/> Self-sufficiency <input checked="" type="checkbox"/> Housing Choice	
This MTW activity has the following cost implications: <input type="checkbox"/> Neutral <input type="checkbox"/> Increased revenue <input type="checkbox"/> Decreased revenue <input checked="" type="checkbox"/> Increased expenditures <input type="checkbox"/> Decreased expenditures	
A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies: <input type="checkbox"/> to all assisted households <input checked="" type="checkbox"/> only to a subset or subsets of assisted households	
. A MTW activity can apply only to new admissions, only to currently assisted households, or to both new admissions and currently assisted households. This MTW activity applies to: <input checked="" type="checkbox"/> New admissions (i.e., applicants) only <input type="checkbox"/> Currently assisted households only <input type="checkbox"/> New admissions and currently assisted households	
A MTW activity can apply to all family types or only selected family types. This MTW activity applies to: <input checked="" type="checkbox"/> all family types	

**17.c. Housing Development Programs**

☐ only to selected family types

Please select the family types subject to this MTW activity:

☐ Non-elderly, non-disabled families

☐ Elderly families

☐ Disabled families (to the extent those families are not exempt via a reasonable accommodation)

☐ Other – another specifically defined target population or populations. The description of this population is:

An MTW activity can apply to a tenant-based and or project-based voucher.

☐ The MTW activity applies to all tenant-based units.

☐ The MTW activity applies to all properties with project-based vouchers.

☒ The MTW activity applies to specific tenant-based units and/or properties with project-based vouchers. The description of which tenant-based units and/or properties with project-based vouchers that will participate in this MTW activity is:  
Families selected to reside in the complexes receiving funds.

This MTW activity does not require a Safe Harbor Waiver.

This MTW activity does not require a hardship policy.

This MTW activity does not require an impact analysis.

The impact analysis does not apply to more than this MTW activity.

<b>Cohort 4.2 Front-End Vacancy Loss Payment</b>
Currently Implementing
<p>ACTIVITY 2022-11: This activity is to incentivize landlords to participate in the HCV program in combination with activities 2022-04, 2022-05, 2022-06, and 2022-07.</p> <p>As these activities are implemented to increase landlord participation in the program, units that are required to house voucher holders such as Project-Based Voucher units, ones with a regulatory agreement on the units, Tax Credit units, or ones owned by the Housing Authority are not included in this activity.</p> <p>Similar to ACTIVITY 2022-04 except this allows the AHA to make a payment up to one month's rent payment to a landlord whose unit was not vacated by a participant of the Housing Choice Voucher program and is subsequently occupied by a participant of the Housing Choice Voucher program. The payment would be made after the execution of the HAP contract.</p>
<p>This MTW activity serves the following statutory objectives:</p> <p><input type="checkbox"/> Cost effectiveness</p> <p><input type="checkbox"/> Self-sufficiency</p> <p><input checked="" type="checkbox"/> Housing Choice</p>
<p>This MTW activity has the following cost implications:</p> <p><input type="checkbox"/> Neutral</p> <p><input type="checkbox"/> Increased revenue</p> <p><input type="checkbox"/> Decreased revenue</p> <p><input checked="" type="checkbox"/> Increased expenditures</p> <p><input type="checkbox"/> Decreased expenditures</p>
<p>A MTW activity may apply to all assisted households or only to a subset or subsets of assisted households by having a different policy by household status/family types/sites. This MTW activity applies:</p> <p><input type="checkbox"/> to all assisted households</p> <p><input checked="" type="checkbox"/> only to a subset or subsets of assisted households</p>
<p>A MTW activity can apply only to new admissions, only to currently assisted households, or to both new admissions and currently assisted households. This MTW activity applies to:</p> <p><input type="checkbox"/> New admissions (i.e., applicants) only</p> <p><input type="checkbox"/> Currently assisted households only</p> <p><input checked="" type="checkbox"/> New admissions and currently assisted households</p>
<p>A MTW activity can apply to all family types or only selected family types. This MTW activity applies to:</p> <p><input checked="" type="checkbox"/> all family types</p> <p><input type="checkbox"/> only to selected family types</p>
<p>An MTW activity can apply to a tenant-based and or project-based voucher.</p>

<b>Cohort 4.2 Front-End Vacancy Loss Payment</b>
<input type="checkbox"/> The MTW activity applies to all tenant-based units. <input type="checkbox"/> The MTW activity applies to all properties with project-based vouchers. <input checked="" type="checkbox"/> The MTW activity applies to specific tenant-based units and/or properties with project-based vouchers. The description of which tenant-based units and/or properties with project-based vouchers that will participate in this MTW activity is:  Does not apply to PHA owned, LIHTC units, or units with regulatory agreements. Would not apply to Project-Based Voucher units.
This MTW activity does not require a Safe Harbor Waiver.
This MTW activity does not require a hardship policy.
This MTW activity does not require an impact analysis.
Based on the Fiscal Year goals listed in the activity's previous Fiscal Year's narrative, provide a description about what has been accomplished or changed during the implementation.  The AHA implemented this activity on July 1, 2023 but no payments have been made under this policy in the most recently completed fiscal year.
This activity has not been discontinued and is not planned to be discontinued.

## **D. SAFE HARBOR WAIVERS**

### **D.1. Safe Harbor Waivers seeking HUD Approval:**

The MTW Operations Notice describes a simplified process for MTW agencies to implement MTW activities outside of the safe harbors described in Appendix I. For each Safe Harbor Waiver request, a document that includes the following information must be provided: (a) the name and number of the MTW Waiver and associated activity for which the MTW agency is seeking to expand the safe harbor, (b) the specific safe harbor and its implementing regulation, (c) the proposed MTW activity the MTW agency wishes to implement via this Safe Harbor Waiver, (d) a description of the local issue and why such an expansion is needed to implement the MTW activity, (e) an impact analysis, (f) a description of the hardship policy for the MTW activity, if applicable, and (g) a copy of all comments received at the public hearing along with the MTW agency's description of how the comments were considered, as a required attachment to the MTW Supplement.

Will the MTW agency submit request for approval of a Safe Harbor Waiver this year?

☒ No   ☐ Yes

## **E. AGENCY SPECIFIC WAIVERS**

### **E.1. Agency-Specific Waivers for HUD Approval:**

The MTW demonstration program is intended to foster innovation and HUD encourages MTW agencies, in consultation with their residents and stakeholders, to be creative in their approach to solving affordable housing issues facing their local communities. For this reason, flexibilities beyond those provided for in Appendix I may be needed. Agency-Specific Waivers may be requested if an MTW agency wishes to implement additional activities, or waive a statutory and/or regulatory requirement not included in Appendix I.

In order to pursue an Agency-Specific Waiver, an MTW agency must include an Agency-Specific Waiver request, an impact analysis, and a hardship policy (as applicable), and respond to all of the mandatory core questions as applicable.

For each Agency-Specific Waiver(s) request, please upload supporting documentation, that includes: a) a full description of the activity, including what the agency is proposing to waive (i.e., statute, regulation, and/or Operations Notice), b) how the initiative achieves one or more of the 3 MTW statutory objectives, c) a description of which population groups and household types that will be impacted by this activity, d) any cost implications associated with the activity, e) an implementation timeline for the initiative, f) an impact analysis, g) a description of the hardship policy for the initiative, and h) a copy of all comments received at the public hearing along with the MTW agency's description of how the comments were considered, as a required attachment to the MTW Supplement.

Will the MTW agency submit a request for approval of an Agency-Specific Waiver this year?

☐ No [If no, skip to E.2] ☒ Yes [If yes, please provide a title and upload required information in a-h above for each Agency-Specific Waiver request]

The AHA has revised the regulations waived in its MTW Activity 2022-14 Project-Based Voucher Right Sizing since the provisions waived under the original activity have been organizationally restructured in recent revisions by HUD to the regulations governing the PBV program and in the letter of approval received by HUD on February 19, 2025, HUD stated that "the AHA must go through the standard waiver approval process with the MTW office regarding any relief from the new regulatory requirements currently in effect." The description of this activity now reads: "The Alameda Housing Authority (AHA) is seeking to waive 24 CFR 983.260 to implement the Project-Based Right Sizing activity through an Agency-Specific waiver. This activity will allow families who are under-housed to remain in smaller Project-Based Voucher (PBV) units if the unit is not overcrowded and the under-housed family wishes to remain in the unit. Families assisted through PBV units would be offered the ability to move to a larger PBV unit, if available, or to receive a Housing Choice Voucher, but the family may elect to expand their housing choice by remaining in the unit that is smaller than the occupancy standard specifies. "

The AHA has revised the regulations waived in its MTW Activity 2023-02 Project-Based Voucher Contract Rent Increases since the provisions waived under the original activity have been organizationally restructured in recent revisions by HUD to the regulations governing the PBV program and in the letter of approval received by HUD on February 19, 2025, HUD stated that "the AHA must go through the standard waiver approval process with the MTW office regarding any relief from the new regulatory requirements currently in effect." The description of this activity now reads: " The Alameda Housing Authority (AHA) is seeking to waive 24 CFR 983.302 (b) to implement the PBV Contract Rent Increases activity through an Agency-Specific Waiver. This activity will allow all rent increases for PBV units to be increased once a year at the beginning of AHA's fiscal year rather than the contract's anniversary date. This waiver will also allow staff to bundle rent increases once a year to efficiently determine rent reasonableness and ensure notice requirements were met in a timely manner rather than stagger rent increase determinations throughout the year."

## **E.2. Agency-Specific Waiver(s) for which HUD Approval has been Received:**

For each previously approved Agency-Specific Waiver(s), a set of questions will populate.

Does the MTW agency have any approved Agency-Specific Waivers?

☒ Yes ☐ No [If no, question set concludes]

## **F. PUBLIC HOUSING OPERATING SUBSIDY GRANT REPORTING**

Not applicable as the Housing Authority of the City of Alameda does not have Public Housing.

## **G. MTW STATUTORY REQUIREMENTS**

### **G.1. 75% Very Low Income – Local, Non-Traditional.**

Not applicable as the Housing Authority of the City of Alameda does not have a local, non-traditional MTW activity.

### **G.2. Establishing Reasonable Rent Policy.**

Has the MTW agency established a rent reform policy to encourage employment and self-sufficiency?

☒ Yes

☐ No

[If Yes]: please describe the MTW agency's plans for its future rent reform activity and the implementation time line.

The AHA implemented an alternative reexamination schedule (activity 2022-02) which encourages self-sufficiency by allowing families to retain income increases of less than 10% between triennials. This activity was implemented on July 1, 2023, with a threshold of \$10,000 but to be consistent with HOTMA regulations this threshold was revised to 10% which was implemented on August 1, 2024.

Also, activity 2022-15 encourages self-sufficiency by allowing families who were chosen to be a part of the GBI program to retain income increases from the GBI program.

### **G.3. Substantially the Same (STS) – Local, Non-Traditional**

Not applicable as the Housing Authority of the City of Alameda has not implemented its local, non-traditional MTW activity.

### **G.4. Comparable Mix (by Family Size) – Local, Non-Traditional**

Not applicable as the Housing Authority of the City of Alameda has not implemented its local, non-traditional MTW activity.

### **G.5. Housing Quality Standards**

Certification is included in MTW Certifications of Compliance for HCV and local, non-traditional program.

## **H. PUBLIC COMMENTS**

H.1.

Please provide copy of all comments received by the public, Resident Advisory Board, and tenant associations.



The AHA did not receive any comments constituting changes to the MTW Supplement from the public or Resident Advisory Board.

Please attach a narrative describing the MTW agency's analysis of the comments and any decisions made based on these comments.

Not Applicable.

If applicable, was an additional public hearing held for an Agency-Specific Waiver and/or Safe Harbor waiver? ☐ Yes ☒ No

If yes, please attach the comments received along with the MTW agency's description of how comments were considered.

## **I. EVALUATIONS**

I.1. Please list any ongoing and completed evaluations of the MTW agency's MTW policies, that the PHA is aware of, including the information requested in the table below.

Does the PHA have an agency-sponsored evaluation? ☐ Yes ☒ No

## **J. MTW CERTIFICATION OF COMPLIANCE**

The MTW agency must execute the MTW Certifications of Compliance form and submit as part of the MTW Supplement submission to HUD.

Please see form HUD-50075-MTW for the certification form that will be executed prior to MTW Supplement submission.

## HARDSHIP POLICY- PAYMENT STANDARD – SAFMR

This Moving to Work (MTW) activity allows the agency to request a change in Payment Standard based on an expanded range of 80% to 150% of the Small Area Fair Market Rents (SAFMR) by bedroom size.

The agency applies increased payment standards during the following participant events:

1. Regular reexamination of household income and composition.
2. When an owner requests a rent increase with a new lease.

A financial hardship for a decrease in payment standards are only for families where the payment standard would decrease in an established unit (not at unit transfers or issuance of vouchers), where the payment standard is set less than 90% of the SAFMR, and where:

- the family has experienced a decrease in income because of changed circumstances, including loss or reduction of employment, death in the assisted family, or reduction in or loss of earnings or other assistance; and
- the family has experienced an increase in expenses, because of changed circumstances, for medical costs, childcare, transportation, education, or similar items.

### **Requested a Hardship**

To qualify for a hardship exemption for a payment standard less than 90% of the SAFMR, a family must submit a request for a hardship exemption in writing to [hardshiprequest@alamedahsg.org](mailto:hardshiprequest@alamedahsg.org). A paper request may be submitted at the Agency's offices, but it will be scanned and e-mailed to this address for tracking purposes. The request must explain the nature of the hardship and how the hardship has affected the family's ability to pay rent.

### **Determination of Hardship**

When a family requests a financial hardship exemption, the AHA must suspend the MTW activity while the request is being processed beginning the first of the month following the family's request until the AHA has determined if the request is warranted. This means the AHA will set the family's payment standard at 90% until the determination of the hardship is determined.

During this suspension, the AHA will determine whether the financial hardship exists and whether the hardship is temporary or long-term. AHA defines temporary hardship as a hardship expected to last 90 days or less. Long-term hardship is defined as a hardship expected to last more than 90 days.

AHA will determine the nature of the hardship within 30 calendar days of the request being received. If the AHA requests information from the family and it is not received within the 30 days after the original request was made, the AHA may deny the request and require the family to repay the additional assistance paid during the suspension of the MTW activity period.

### **No Financial Hardship**

If AHA determines there is no financial hardship, AHA will reinstate the reduced payment standard and require the family to repay the additional assistance paid during the suspension of the MTW activity period.

AHA will require the family to repay the suspended amount within 30 calendar days of AHA's notice that a hardship exemption has not been granted.

### **Temporary Hardship**

If AHA determines that a qualifying financial hardship is temporary, AHA must suspend the MTW activity for the 90-day period beginning the first of the month following the date of the family's request for a hardship exemption.

At the end of the 90-day suspension period, the family must resume payment of their portion of the rent including the calculation of the decreased payment standard and must repay the AHA the amounts suspended. This repayment, upon request of the household, will be subject to a repayment plan under the AHA's repayment agreement policies if eligible.

### **Long-Term Hardship**

If AHA determines that the financial hardship is long-term, AHA must exempt the family from the MTW activity for so long as the hardship continues. The exemption will apply from the first of the month following the family's request until the later of the end of the qualifying hardship event or the family's second regular reexamination after the decrease in payment standards was implemented. When the financial hardship has been determined to be long-term, the family is not required to repay the additional subsidy paid under the hardship.

### **Grievance procedure:**

The family may request a second level review of the denied hardship request by submitting a written appeal to [hardshiprequest@alamedahsg.org](mailto:hardshiprequest@alamedahsg.org). This appeal should contain any information the family would like to be taken into account during the appeal review including why the family believes the incorrect determination was made. The appeal will be reviewed by a different staff member than the one that made the original

determination. Also, any staff reporting to the staff member making the original denial will be ineligible to review the appeal request. The appeal will be reviewed and responded to within 14 days of the receipt of the appeal.

If the second review results in the same decision as the original request, the family may request an Informal Hearing according to the AHA's Informal Hearing procedures.

DRAFT

## IMPACT ANALYSIS – 2.a. Payment Standards - SAFMR

The current 2025 Fair Market Rents (FMR) and Small Area Fair Market Rents (SAFMR) for Zip codes 94501 and 94502 are listed below.

Bedrooms	2025 FMR	2025 Zip Code 94501 SAFMR	2025 Zip Code 94502 SAFMR
0	\$ 1,937	\$ 1,960	\$ 2,720
1	\$ 2,201	\$ 2,230	\$ 3,090
2	\$ 2,682	\$ 2,720	\$ 3,760
3	\$ 3,432	\$ 3,480	\$ 4,810
4	\$ 4,077	\$ 4,130	\$ 5,720
5	\$ 4,688	\$ 4,749	\$ 6,578

The Housing Authority of the City of Alameda's payment standards are currently set at 120% of FMR. The table below shows the Housing Authority's current payment standards and payments standards if this activity is approved and implemented.

Bedrooms	Current Payment Standard (120% of FMR)	120% of SAFMR for Zip Code 94501	120% of SAFMR for Zip Code 94502
0	\$ 2,324	\$ 2,352	\$ 3,264
1	\$ 2,641	\$ 2,676	\$ 3,708
2	\$ 3,218	\$ 3,264	\$ 4,512
3	\$ 4,118	\$ 4,176	\$ 5,772
4	\$ 4,892	\$ 4,956	\$ 6,864
5	\$ 5,625	\$ 5,699	\$ 7,894

**FACTOR 1:** Impact on the agency's finances (e.g., how much will the activity cost, any change in the agency's per family contribution)

It is always difficult to predict exactly what will happen when payment standards are increased. Some landlords use these values as the starting point for setting their rents; however, in some cases, rent reasonableness studies will keep the rents lower than payment standards because unassisted tenants are paying lower rents.

\*Please note that all the data provided below is as of May 2025. \*

There are currently 1,793 households living in the zip code 94501 and 38 households living in the zip code 94502.

The following shows the number of units by bedroom size currently living in the zip code 94501 along with the dollar increase of using 120% of SAFMRs rather than the current level of 120% of FMRs where the AHA has its payment standards.

Bedrooms	Units on the Program	Current Payment Standard (120% of FMR)	120% of SAFMR	Increase in Payment Standard	Payment Standard Increase multiplied by the Number of Units
0	87	\$ 2,324	\$ 2,352	\$ 28	\$ 2,436
1	617	\$ 2,641	\$ 2,676	\$ 35	\$ 21,595
2	689	\$ 3,218	\$ 3,264	\$ 46	\$ 31,694
3	323	\$ 4,118	\$ 4,176	\$ 58	\$ 18,734
4	70	\$ 4,892	\$ 4,956	\$ 64	\$ 4,480
5	7	\$ 5,625	\$ 5,699	\$ 74	\$ 517

The following shows the number of units by bedroom size currently living in the zip code 94502 along with the dollar increase of using 120% of SAFMRs rather than the current level of 120% of FMRs where the AHA has its payment standards.

Bedrooms	Units on the Program	Current Payment Standard (120% of FMR)	120% of SAFMR	Increase in Payment Standard	Payment Standard Increase multiplied by the Number of Units
0	0	\$ 2,324	\$ 3,264	\$ 940	\$ -
1	6	\$ 2,641	\$ 3,708	\$ 1,067	\$ 6,402
2	7	\$ 3,218	\$ 4,512	\$ 1,294	\$ 9,058
3	20	\$ 4,118	\$ 5,772	\$ 1,654	\$ 33,080
4	5	\$ 4,892	\$ 6,864	\$ 1,972	\$ 9,860
5	0	\$ 5,625	\$ 7,894	\$ 2,269	\$ -

If the possible increase in payment standard for each bedroom size is multiplied by the number of units of that bedroom size and added together, the increased costs would be \$137,856. As not all families would receive the increased payment standard at the bedroom size in which they are residing (over- and under-housed families would be assisted at the lower of the unit or voucher size), an additional analysis of the approximately 1800 vouchers leased as of May 2025 was conducted to provide a range of costs based on differing scenarios.

If all rents were kept at the current level, this activity would cost the AHA approximately \$90,623 per month in increased HAP costs for zip code 94501 and approximately \$8,977 per month in increased HAP costs for zip code 94502. In total, if all rents were kept at the current level, this activity would cost the AHA approximately \$99,600 per month in increased HAP costs.

If all landlords raised their rents to 120% of the SAFMR and rent reasonableness supported that large of an increase, the increased HAP costs for zip code 94502 would be \$57,346 per month and the increased HAP costs for zip code 94501 would be \$784,780 per month. In total, if all landlords raised their rents to 120% of the SAFMR and rent reasonableness supported that large of an increase, this activity would cost the AHA approximately \$842,146 per month in increased HAP costs. In reality, if the SAFMRs are appropriately set, the rent reasonableness test will not allow all units to increase to 120% of the SAFMR.

In conjunction with the activity of changing a family's regular reexamination to once every three years rather than annually, increasing payment standards at rent increases from landlords will result in a smaller savings than would be achieved by the decrease in annual activity alone. By moving families to regular reexaminations of every three years versus every year, the families would not have received the benefit of increased payment standards in the interim two years resulting in lower Housing Assistance Payments (HAP) to landlords if the gross rent is at or above the payment standard without increasing the payment standard at owner rent increase requests.

**FACTOR 2:** Impact on affordability of housing costs for affected families (e.g., any change in how much affected families will pay towards their housing costs)

As the AHA is proposing to raise payment standards to 120% of the Small Area Fair Market Rents for all bedroom sizes, this would decrease the family contribution to rent to owner for a large number of households and increase the Housing Assistance Payments (HAP) costs of the AHA. Assuming the landlords do not raise rents for the units, the average percent change in reduced payments by the family is approximately 33% with some families experiencing a 100% reduction in their payments towards gross rent (families with low incomes and units over the current payment standard) while others would not experience a decrease because their owner currently has the rent on the unit below the payment standard.

By increasing the family's payment standard to the higher payment standard at rent increases, the family's portion of rent under rent increases will be

decreased if the rent increase results in a rent higher than the lower payment standard.

**FACTOR 3:** Impact on the agency's waitlist(s) (e.g., any change in the amount of time families are on the waitlist)

Most of the applicants drawn off the waitlist are to replace households or to raise lease-up rates due to underspent HAP. There would be fewer HAP dollars to allow for an increase in lease-up, but the number of replacement families would not significantly change.

**FACTOR 4:** Impact on the agency's termination rate of families (e.g., any change in the rate at which families non-voluntarily lose assistance from the agency)

This will result in a minimally lower number of families losing assistance due to the rule of termination of assistance after 180 days of zero HAP payment. If landlords raise the rent of the unit to the maximum of 120% of SAFMR, then the seven families at zero HAP currently would all receive a HAP payment as the increased rents would be more than their current TTP; however, most families report a change of income prior to the 180-day termination date.

This will also decrease the number of lower-income families in higher rent units that may face termination for non-payment of rent.

**FACTOR 5:** Impact on the agency's current occupancy level in public housing and utilization rate in the HCV program

This would increase the HAP utilization rate of the AHA as the AHA could pay more in HAP for currently assisted families and this would incentivize landlords to rent new units to voucher participants.

**FACTOR 6:** Impact on meeting the MTW statutory goals of cost effectiveness, self-sufficiency, and/or housing choice

This would increase the housing choice of families as the biggest impediment to families leasing outside the established network of landlords with the AHA is the rent being found reasonable but the family unable to rent unit because the rent is above the affordability rule. This would allow families to afford these higher rent units.



Increasing the payment standard at rent increases would increase housing choice by keeping a family in the same unit as the rents increase and make the unit unaffordable.

**FACTOR 7: Impact on the agency's ability to meet the MTW statutory requirements**

**a) Very Low-Income Requirement**

The agency would still be able to meet this requirement as this activity would not impact the selection of applicants.

**b) Reasonable Rent Policy**

This activity does not affect the family's calculation of total tenant payment to encourage employment and self-sufficiency. It would decrease the family's share of rent to owner in many cases, allowing the family to have income for other purposes like saving or paying for education classes.

**c) Substantially the Same Requirement**

The AHA will monitor the increased HAP expenditures to ensure that resources are available to continue to assist the same number of families.

**d) Comparable Mix Requirement**

This activity would have no effect on the number of household members in families, so would meet this statutory requirement.

**e) Housing Quality Standards (HQS)**

The units would continue to have to meet the HQS standards, so this statutory requirement would be met. The unit selection may even increase the quality of units available as higher rent units may become affordable.

**FACTOR 8: Impact on the rate of hardship requests and the number granted and denied as a result of this activity**

This should not result in an increase of hardship requests as the participants should be receiving an increased HAP payment in most cases and, in some,

a decreased tenant payment for units where the rents are above the current payment standards.

FACTOR 9: Across the other factors above, the impact on protected classes (and any associated disparate impact)

As there is a statistical relationship between the bedroom size in which families are housed and the protected classes of race, disability, age, and family status, the payment standard will be increased for all bedroom sizes to 120% of SAFMR to avoid a disparate impact to any protected class and every owner rent increase will be eligible for the increased payment standard.

DRAFT



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Sepideh Kiumarsi, Senior Management Analyst

Date: June 18, 2025

Re: Adopt the Agency's Significant Amendment to the Annual Plan and Moving to Work Supplement for Fiscal Year Starting July 1, 2025 and Authorize the Chair to Certify that the Board of Commissioners has Approved Submission of the Significant Amendment to the Annual Plan to HUD.

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## **BACKGROUND**

The Housing Authority of the City of Alameda's (AHA) Annual Plan is a document that is mandated by and must be submitted to the U.S. Department of Housing and Urban Development (HUD). As a Housing Choice Voucher (Section 8) only and High Performer agency, HUD allows AHA to submit a Streamlined Annual PHA Plan formally referred to as HUD Form 50075-HCV. An Annual Plan must be submitted every year.

In 2022, AHA was accepted into the Moving to Work (MTW) Demonstration Expansion under the Landlord Incentives Cohort to test the effectiveness of landlord incentives. AHA is required to comply with the MTW Operations Notice while participating in the MTW Demonstration Program and as such, needs to submit an MTW Supplement with its Annual Plan every year.

Public Housing Authorities (PHAs) are allowed to make revisions during the fiscal year for which an annual plan is submitted. If a Housing Authority chooses to make revisions, it must identify specifically which plan elements have been revised by the PHA, must undergo the public comment process, receive approval from its Board, and submit the revised annual plan to HUD for approval. As part of its 5-Year Plan and Annual Plan, PHAs define the criteria for which a revision meets the definition of a "Significant Amendment or Modification". Please refer to the previous Board memo for more information regarding the definition of a Significant Amendment or Modification.

## **DISCUSSION**

Please refer to Board item 11.A. "Conduct the Public Hearing for the Significant Amendment to the Annual Plan and Moving to Work Supplement for Fiscal Year 2025-2026." for a copy of the proposed Significant Amendment to the Annual Plan and MTW



Supplement.

HUD requires that the Significant Amendment to the Annual Plan and MTW Supplement be made available for public comment 45 days prior to a public hearing. These documents were posted to AHA's website for public comment on May 2, 2025 and a public hearing is being held on June 18, 2025. Written comments were also accepted through June 16, 2025, and since this memo is being drafted before this date, AHA staff will verbally note during the public hearing if any comments were received and if they would result in changes to the revised Annual Plan or MTW Supplement. If comments are received and would result in changes to the proposed Significant Amendment to the Annual Plan and MTW Supplement for Fiscal Year 2025-2026, the plans will be revised and presented to the Board at a later time.

On May 28, 2025, the Resident Advisory Board (RAB), representing the interests of the participants in the Housing Choice Voucher and Project Based Voucher programs, reviewed and commented on the Significant Amendment to the Annual Plan and MTW Supplement for Fiscal Year 2025-2026. None of the comments resulted in changes to the revised Annual Plan or MTW Supplement (please refer to Attachment A).

The Board of Commissioners conducted a Public Hearing prior to the consideration of adopting the Significant Amendment to the Annual Plan and MTW Supplement for Fiscal Year 2025-2026 to accept additional oral comments. This report assumes no oral comments were received that would result in changes to the proposed Significant Amendment to the Annual Plan and MTW Supplement for Fiscal Year 2025-2026. If comments are received and would result in changes to the proposed Significant Amendment to the Annual Plan and MTW Supplement for Fiscal Year 2025-2026, the plans will be revised and presented to the Board at a later time.

HUD also requires a signed copy of the Certification of Consistency with the Consolidated Plan (HUD Form 50077-SL) to certify compliance of the Annual Plan and MTW Supplement with federal regulations and consistency with the City of Alameda's Consolidated Plan. HUD recently published the updated forms and, as such, AHA staff have not had enough time to present this certification to the City. AHA staff are currently working with the City to receive a signed version of this certification and will submit the Annual Plan and a signed copy of the Certification of Consistency with the Consolidated Plan onto the online platform once it is received. A blank copy of the certification is attached for review.

### **FISCAL IMPACT**

Not Applicable

### **CEQA**

Not Applicable.

### **RECOMMENDATION**

Adopt the Agency's Significant Amendment to the Annual Plan and Moving to Work Supplement for Fiscal Year Starting July 1, 2025 and Authorize the Chair to Certify that the Board of Commissioners has Approved Submission of the Significant Amendment to the Annual Plan to HUD.

**ATTACHMENTS**

1. Attachment A - Resident Advisory Board Comments
2. Attachment B - Certification by State or Local Official of PHA Plans Consistency with the Consolidated Plan or State Consolidated Plan

Respectfully submitted,

*Sepideh Kiumarsi*

Sepideh Kiumarsi, Senior Management Analyst

Significant Amendments  
Fiscal Year 2025-2026

ATTACHMENT A  
RESIDENT ADVISORY BOARD COMMENTS

Resident Advisory Board was held May 28, 2025, at 5:00 p.m. at Independence Plaza, Ruth Rambeau Community Room, 703 Atlantic Avenue, Alameda, California.

Roll Call:

Present: 2 members present.

Absent: 0 member absent.

Staff present:

Tonya Schuler-Cummins, Director of Data and Policy

Sepideh Kiumarsi, Senior Management Analyst, Data and Policy

Ronald Babiera, Assistant Director of Housing Programs

Discussed with Resident Advisory Board the Significant Amendment to the Annual Plan and MTW Supplement for Fiscal Year 2025-2026.

Resident Advisory Board (RAB) Comments:

One RAB member requested clarification for the current payment standard policy, rent reasonableness and rent increase policies and procedures, which were explained. The RAB did not have any further comments or questions in this regard.

One RAB member had questions regarding the future of the voucher program in the midst of funding cuts by HUD and requested more information. Staff explained that at this time Congress had not approved a budget, so this significant amendment was drafted to ensure that the agency is prepared in the case of insufficient funding.

Another RAB member commended the Housing Authority's efforts to find program funding and solutions. Another RAB member commended the Housing Authority's efforts to prepare for the possibility of insufficient funding.

One RAB member asked when HOTMA would be implemented and staff explained that HUD had delayed HOTMA indefinitely.

**Certification by State or Local  
Official of PHA Plans Consistency  
with the Consolidated Plan or  
State Consolidated Plan  
(All PHAs)**

U. S Department of Housing and Urban Development

Office of Public and Indian Housing

OMB No. 2577-0226

**Expires: 09/30/2027**

**Certification by State or Local Official of PHA Plans  
Consistency with the Consolidated Plan or State Consolidated Plan**

I, \_\_\_\_\_, the \_\_\_\_\_  
*Official's Name* *Official's Title*

certify that the 5-Year PHA Plan for fiscal years \_\_\_\_\_ and/or Annual PHA Plan for fiscal  
year \_\_\_\_\_ of the \_\_\_\_\_ is consistent with the  
*PHA Name*

Consolidated Plan or State Consolidated Plan including any applicable fair housing goals or  
strategies to:

\_\_\_\_\_  
*Local Jurisdiction Name*

pursuant to 24 CFR Part 91 and 24 CFR Part 903.15.

Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or  
State Consolidated Plan.

I/We, the undersigned, certify under penalty of perjury that the information provided above is true and correct. WARNING: Anyone who knowingly  
submits a false claim or makes a false statement is subject to criminal and/or civil penalties, including confinement for up to 5 years, fines, and civil  
and administrative penalties. (18 U.S.C. §§ 287, 1001, 1010, 1012, 1014; 31 U.S.C. §3729, 3802).

Name of Authorized Official:	Title:
<input type="text"/>	<input type="text"/>
Signature:	Date:
<input type="text"/>	<input type="text"/>

This information is collected to ensure consistency with the consolidated plan or state consolidated plan.

Public reporting burden for this information collection is estimated to average 0.16 hours per year per response, including the time for reviewing instructions,  
searching existing data sources, gathering, and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding  
this burden estimate or any other aspect of this collection of information, including suggestions to reduce this burden, to the Reports Management Officer, REE,  
Department of Housing and Urban Development, 451 7th Street, SW, Room 4176, Washington, DC 20410-5000. When providing comments, please refer to OMB  
Approval No. 2577-0226. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB  
Control Number.

**Privacy Notice.** The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title  
12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information  
are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Joshua Altieri, Community Relations Manager

Date: June 18, 2025

Re: Accept the 2025 Customer Satisfaction Survey.

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### **BACKGROUND**

Since 1993, the Housing Authority of the City of Alameda (AHA) has conducted an annual survey to measure customer satisfaction. The 2025 survey was conducted between February 18, 2025, and April 3, 2025. The 2025 survey requested feedback on customer experience from AHA tenants, AHA landlords, and AHA housing program participants. Survey questions ranged from AHA customer service to food access and technology usage. Each survey included additional questions that were customized specifically to each survey group (tenant, landlord, or program participant). The tenant category includes all tenants living at AHA sites, including those in unsubsidized units, while the program participant category only includes tenants receiving a subsidy through an AHA housing program.

### **DISCUSSION**

As part of the 2025 survey, all survey participants were mailed a printed version of the survey with instructions on how to submit one survey via fax, email, mail, in-person, or via an online form. Additionally, an email was sent to every surveyed tenant, landlord, or program participant that had an email on file with AHA. See the attached presentation and supporting documents for the results of the 2025 Annual Customer Survey.

### **FISCAL IMPACT**

For information only and there is no financial impact.

### **CEQA**

Not applicable

### **RECOMMENDATION**

Accept the 2025 Customer Satisfaction Survey.

### **ATTACHMENTS**





1. 2025 Tenant Survey
2. 2025 Landlord Survey
3. 2025 Housing Program Participant Survey
4. 2025 Survey Report
5. 2025 Survey\_\_Presentation Deck

Respectfully submitted,

A handwritten signature in cursive script that reads "Joshua Altieri".

Joshua Altieri, Community Relations Manager



## 2025 Customer Survey

### Survey Code #

Dear Housing Authority Tenant:

Because we want to provide the best possible customer service to our tenants, we would appreciate your comments about the service you received from the property management staff. Please take a few minutes to tell us how well they did their job by checking the box that best matches the service you received. You can submit this survey via mail, fax, email, or online form (see below). Or bring it by the Housing Authority and put it in our drop box at 701 Atlantic Avenue. Please submit only one completed survey by Thursday, April 3rd, 2025. Thank you for your help!

**PLEASE CHECK THE BOX THAT BEST DESCRIBES  
YOUR EXPERIENCE:**

	Greatly Exceeds	Exceeds	Meets	Does Not Meet	Severely Fails
1. Overall, how would you rate the quality of service you received?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Overall, how would you rate the responsiveness of staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. How would you rate the ability to reach the staff person that you want?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. How would you rate the time in which phone calls were returned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. How would you rate staff's politeness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. How would you rate staff's ability to answer your questions about housing programs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. How would you rate the appearance of your apartment <u>complex</u> ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. How would you rate the maintenance of your apartment <u>complex</u> ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. How would you rate the maintenance of your <u>apartment</u> ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. How would you rate your feeling of safety when in your <u>apartment</u> ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. How would you rate your feeling of safety when in the common areas of your apartment <u>complex</u> ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**The following are a few questions about your use of the Internet.**

12. Do you have access to the Internet from home or work?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
13. Do you have access to the Internet on a mobile device such as an iPhone or tablet?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
14. Have you ever accessed the Internet at Alameda Library or Mastick Senior Center?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
15. Have you ever visited the Housing Authority's website at <a href="http://www.alamedahsg.org">www.alamedahsg.org</a> ?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
16. Would you find it helpful to have additional information or forms available on the Housing Authority's web site? Please use back of form for details.	YES <input type="checkbox"/>	NO <input type="checkbox"/>
17. Please include any additional comments. You may use back of form or include other sheets.		





**The following are a few additional questions related to the recent health crisis:**

- A. If there are K-12 children in the household, do they have access to the internet for education activities? YES ☐ NO ☐ N/A ☐
- B. Is getting enough food in your household a problem? YES ☐ NO ☐
- C. Is your household accessing food resources, such as the Alameda Food Bank? YES ☐ NO ☐

**5 DIFFERENT WAYS TO SUBMIT ONE COMPLETED SURVEY by April 3, 2025::**

- (1) **PLACE IN AHA DROP BOX** AT 701 Atlantic Avenue, Alameda, CA 94501
- (2) **MAIL TO** 701 Atlantic Avenue, Alameda, CA 94501 (Attention: Ombudsman)
- (3) **FAX TO** (510) 522-7848 (Attention: Ombudsman)
- (4) **EMAIL TO** [ombudsman@alamedahsg.org](mailto:ombudsman@alamedahsg.org)
- (5) **ONLINE FORM:** <https://www.surveymonkey.com/r/VBZ2R8S>





## 2025 LANDLORD SURVEY

### Survey Code #

Dear Housing Authority Landlord:

Because we want to provide the best possible service to our landlords, we would appreciate your comments about the customer service you received from Housing Authority staff. Please take a few minutes to tell us how well we did our job by checking the box that best matches the service you received. You can submit this survey via mail, fax, email, or online form (see below), Or bring it by the Housing Authority and put it in our drop box at 701 Atlantic Avenue. Please submit only one completed survey by Thursday, April 3rd, 2025. Thank you for your help!

**PLEASE CHECK THE BOX THAT BEST DESCRIBES YOUR EXPERIENCE:**

	Greatly Exceeds	Exceeds	Meets	Does Not Meet	Severely Fails
1. Overall, how would you rate the quality of service you received?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Overall, how would you rate the responsiveness of staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. How would you rate the ability to reach the staff person that you want?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. How would you rate the time in which phone calls were returned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. How would you rate staff's politeness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. How would you rate staff's ability to answer your questions about housing programs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Please include any additional comments. You may use back of form or include other sheets.					

**The following are a few questions about your use of the Internet.**

A. Do you have access to the Internet from home or work?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
B. Do you have access to the Internet via a mobile device (iPhone, iPad, etc.)?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
C. Have you ever accessed the Internet from the Library or the Mastick Senior Center?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
D. Have you ever visited the Housing Authority's website at <a href="http://www.alamedahsg.org">www.alamedahsg.org</a> ?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
E. Would you find it helpful to have additional information or forms available on the Housing Authority's website? If so, please list here.	YES <input type="checkbox"/>	NO <input type="checkbox"/>
F. Have you ever accessed the Rent Café Landlord Portal?	YES <input type="checkbox"/>	NO <input type="checkbox"/>

**5 DIFFERENT WAYS TO SUBMIT ONE COMPLETED SURVEY BY April 3, 2025:**

- (1) **PLACE IN AHA DROP BOX** AT 701 Atlantic Avenue, Alameda, CA 94501
- (2) **MAIL TO** 701 Atlantic Avenue, Alameda, CA 94501 (Attention: Ombudsman)
- (3) **FAX TO** (510) 522-7848 (Attention: Ombudsman)
- (4) **EMAIL TO** [ombudsman@alamedahsg.org](mailto:ombudsman@alamedahsg.org)
- (5) **ONLINE FORM:** <https://www.surveymonkey.com/r/VMC52MV>





## 2025 Customer Survey

### Survey Code #

Dear Housing Authority Customer:

Because we want to provide the best possible customer service to our customers, we would appreciate your comments about the customer service you received from Housing Authority staff. Please take a few minutes to tell us how well we did our job by checking the box that best matches the service you received. You can submit this survey via mail, fax, email, or online form (see below), Or bring it by the Housing Authority and put it in our drop box at 701 Atlantic Avenue. Please submit only one completed survey by Thursday, April 3rd, 2025.

**PLEASE CHECK THE BOX THAT BEST DESCRIBES YOUR EXPERIENCE:**

	Greatly Exceeds	Exceeds	Meets	Does Not Meet	Severely Fails
1. Overall, how would you rate the quality of service you received?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Overall, how would you rate the responsiveness of staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. How would you rate the ability to reach the staff person that you want?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. How would you rate the time in which phone calls were returned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. How would you rate staff's politeness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. How would you rate staff's ability to answer your questions about housing programs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**The following are a few questions about your use of the Internet.**

7. Do you have access to the Internet from home or work?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
8. Do you have access to the Internet on a mobile device such as an iPhone or tablet?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
9. Have you ever accessed the Internet from the Library or the Mastick Senior Center?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
10. Have you ever visited the Housing Authority's website at <a href="http://www.alamedahsg.org">www.alamedahsg.org</a> ?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
11. Would you find it helpful to have additional information or forms available on the Housing Authority's web site? Please use back of form for suggestions.	YES <input type="checkbox"/>	NO <input type="checkbox"/>
12. Please include any additional comments. You may use reverse side of this form to provide feedback.		

**The following are a few additional questions related to the recent health crisis:**

A. If there are K-12 children in the household, do they have access to the internet for education activities?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	N/A <input type="checkbox"/>
B. Is getting enough food in your household a problem?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
C. Is your household accessing local food resources, such as the Alameda Food Bank?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	

**5 DIFFERENT WAYS TO SUBMIT ONE COMPLETED SURVEY by April 3, 2025:**

- (1) **PLACE IN AHA DROP BOX** AT 701 Atlantic Avenue, Alameda, CA 94501
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- (5) **ONLINE FORM:** <https://www.surveymonkey.com/r/VNVSGC6>



**Introduction:**

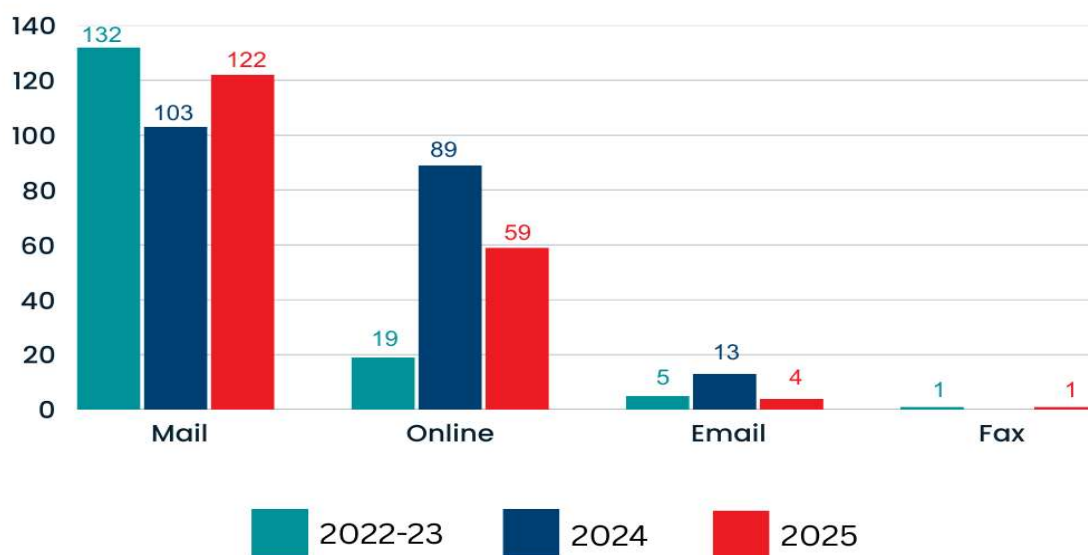
Since 1993, the Housing Authority of the City of Alameda (AHA) has conducted an annual survey to measure customer satisfaction. The survey questionnaire has been revised over the years to best meet this goal. The 2025 survey included the same questions as previous annual customer surveys and was conducted between February 18 and April 3, 2025. The 2025 survey was issued to AHA tenants, AHA landlords, and AHA housing program participants. Survey questions ranged from AHA customer service to food access to technology usage. Each survey included additional questions that were customized specifically to each survey group (tenant, landlord, or housing program participant). The survey forms for each survey group are included in the June 2025 Board Memo.

**Survey Response Methods:**

As part of the 2025 survey, all survey participants were mailed a printed version of the survey with instructions on how to submit one survey via fax, email, mail, in-person, or via an online form. Plus, an email was sent to every surveyed tenant, landlord, or program participant that had an email on file with AHA. Total surveys sent were 1,443 total surveys were mailed out and 186 surveys were returned to AHA. Below is a chart that details data related to survey response methods in the 2025 survey, 2024 survey and the 2022-23 survey. Please note that zero in-person surveys were received.



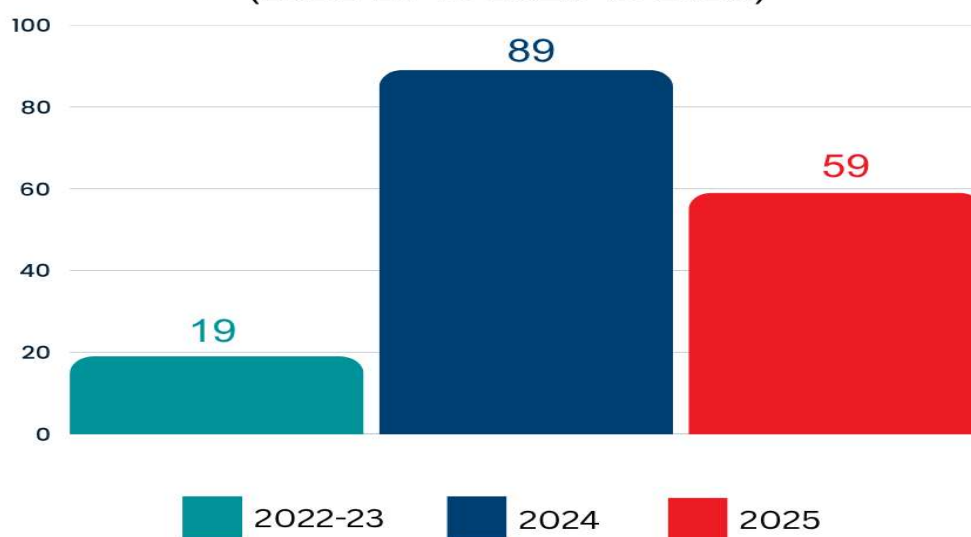
### Total surveys submitted by method (2022-23 vs 2024 vs 2025)



### Online Response

AHA continues to utilize multiple survey return submission options (email, mail, in-person, fax, or online form) to maximize survey response. The 2025 survey was the fourth year of AHA offering an online survey option, with 59 of 186 surveys of all completed surveys submitted via an online form. Please see the bar graphs below to review how the 2025 online survey completion compares to the 2022-23 and 2024 online survey submission totals.

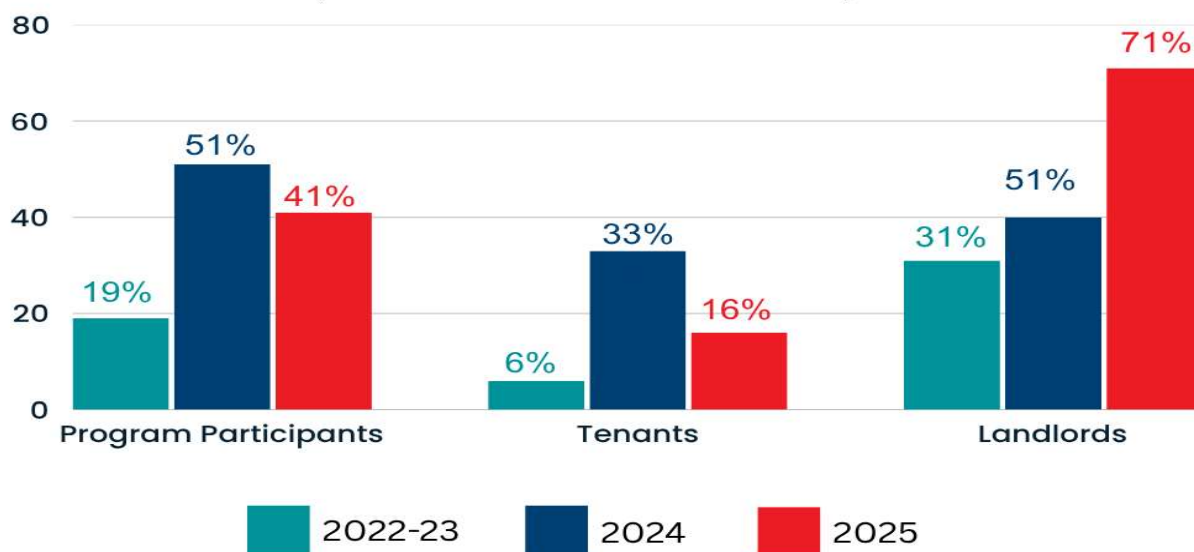
### Total online surveys submitted (2022-23 vs 2024 vs 2025)



The chart below highlights the percentage of total surveys that were submitted online within each specific survey group (tenants, participants, landlords) from the 2025, 2024, and 2022-23 surveys.

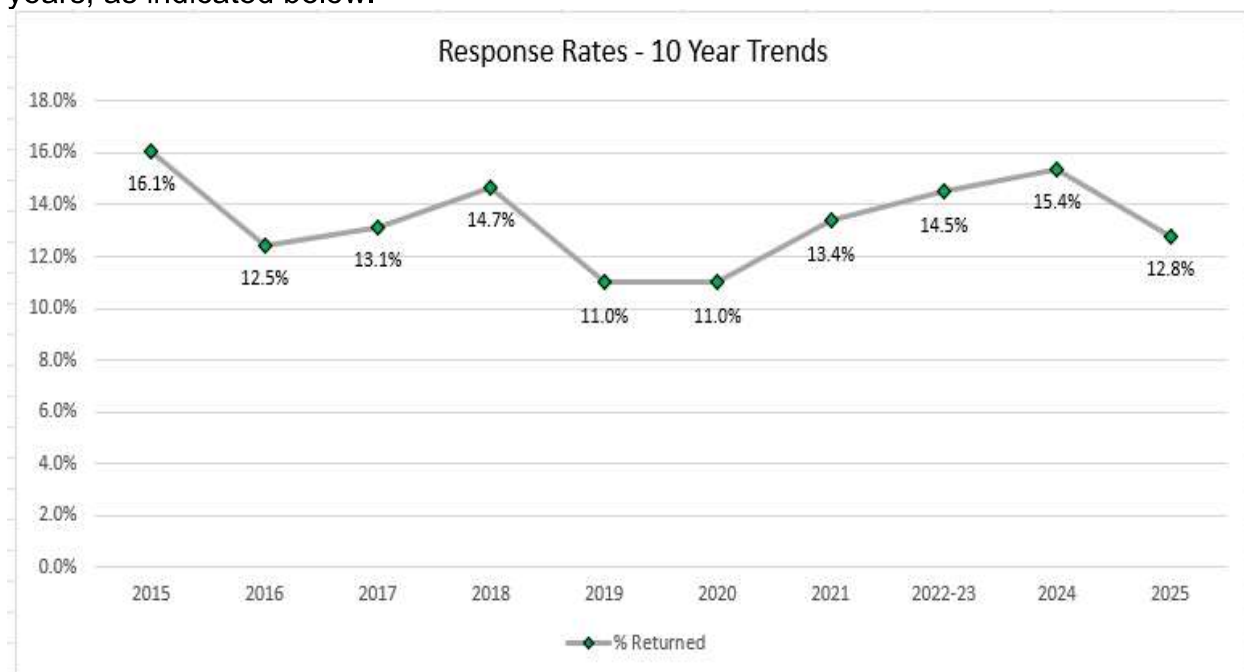
### Percentage of total surveys received through online submissions per survey group

(2022-23 vs 2024 vs 2025)



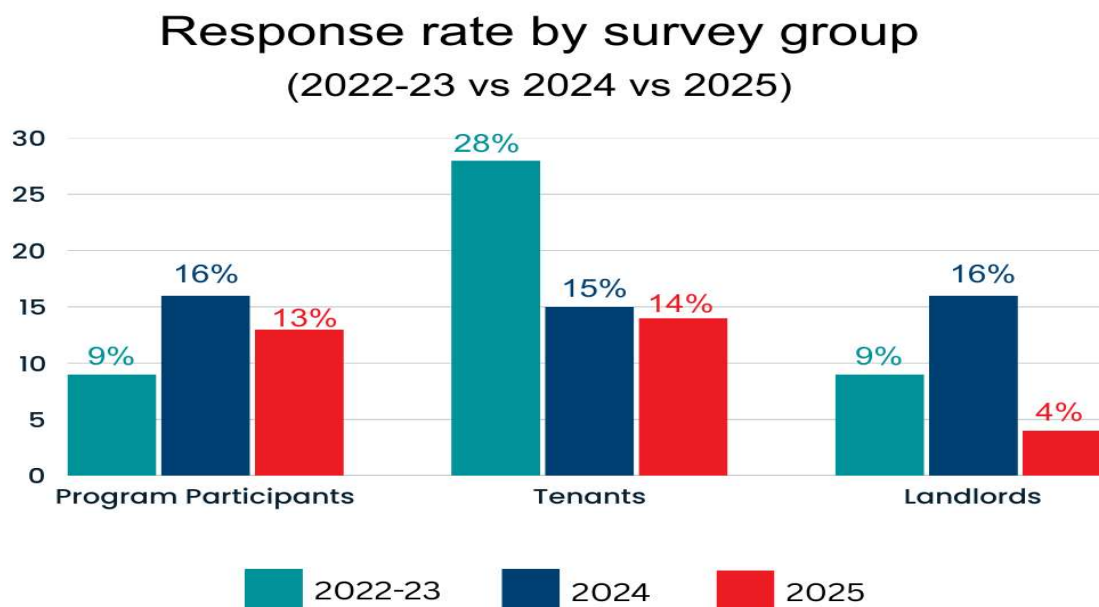
### Response Rates:

A total of 1,443 surveys were issued, and 186 were returned for a response rate of 12.8 percent. The 2025 response rate aligns to the response rates from previous survey years, as indicated below.





The chart below contains the 2025 response rate for each survey group (landlord, tenant, and housing program participant) in comparison to the surveys from 2022-23 and 2024. The response rate of landlords saw a significant decrease, the 2025 survey was the first survey to include survey codes, which may have impacted the landlord response rate.



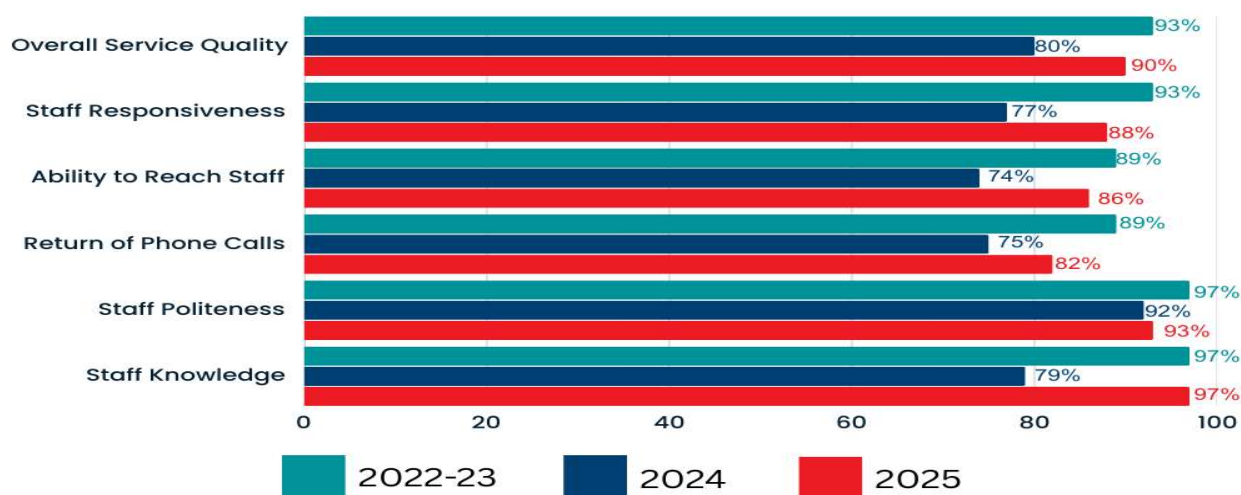
### Overall Quality of Service

All respondent groups (tenants, landlords, program participants) were asked if they felt that the “overall quality of service provided” was meeting or exceeding expectations. The charts below illustrate the respondents’ level of customer satisfaction from all survey groups over the last 10 years. The 2025 survey demonstrated over 10% increase in customer satisfaction in comparison to 2024 survey.



All surveys included six standard questions, each question with a focus on specific customer service elements. The current year (2025) compared to previous years (2022-23 and 2024) is shown in the chart below. Below that chart you will find customer service factors individually ranked for all survey groups (tenants, program participants, and landlords).

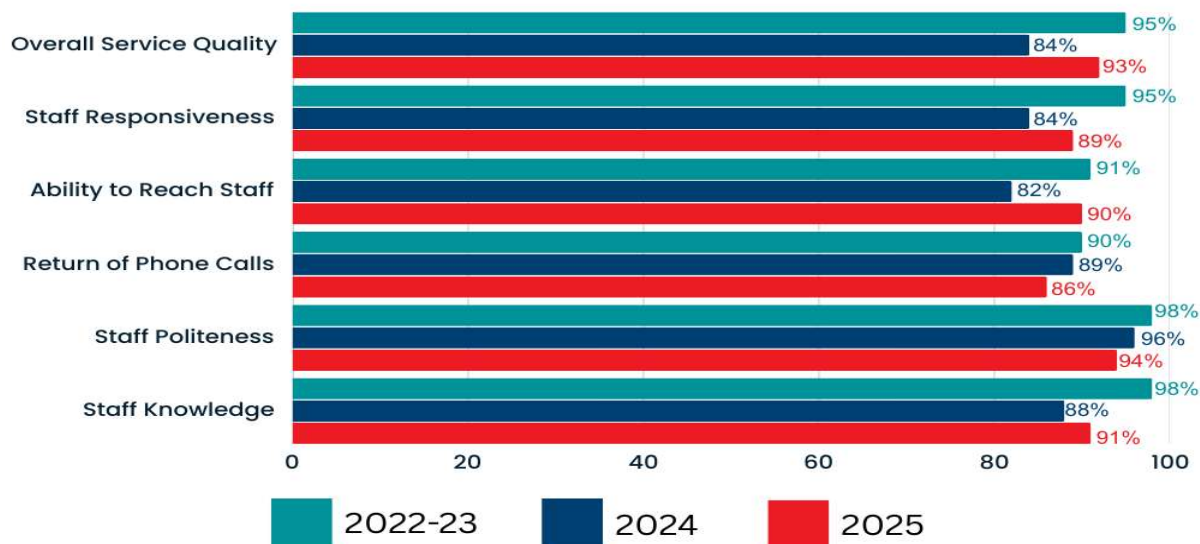
**% of Customer Service Responses (Meets or Exceeds)  
All Survey Groups  
(2022-23 vs 2024 vs 2025)**



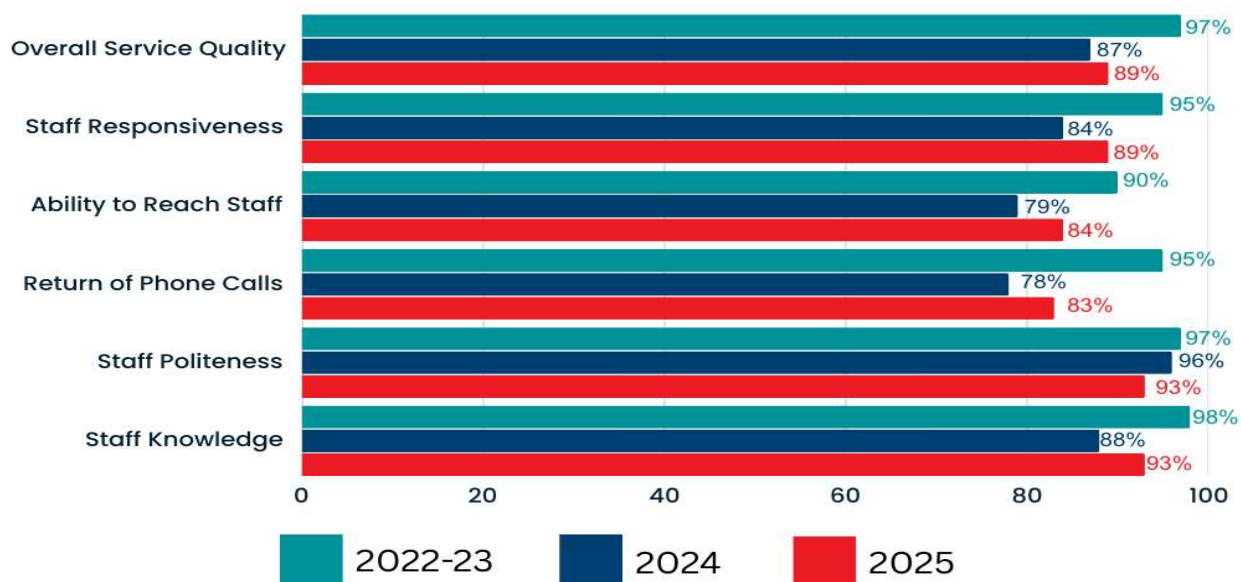
**Customer Service Feedback (per each survey group):**

Below you will find customer service factors ranked by each specific survey group (tenants, program participants, and landlords) in the 2025 Customer Survey, in comparison to 2022-23 and 2024 surveys. Each survey group indicated greater satisfaction amongst most of the customer service elements with the landlord group showing the most significant improvement. Please review below for more details.

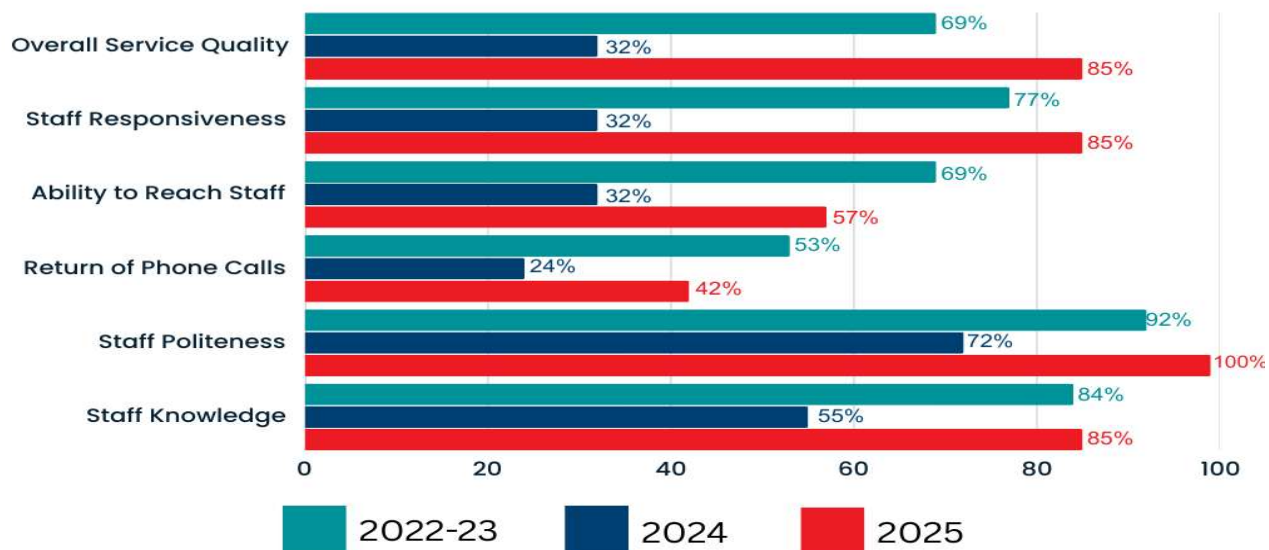
**% of Customer Service Responses (Meets or Exceeds)**  
**AHA Tenants**  
**(2022-23 vs 2024 vs 2025)**



**% of Customer Service Responses (Meets or Exceeds)**  
**AHA Program Participants**  
**(2022-23 vs 2024 vs 2025)**



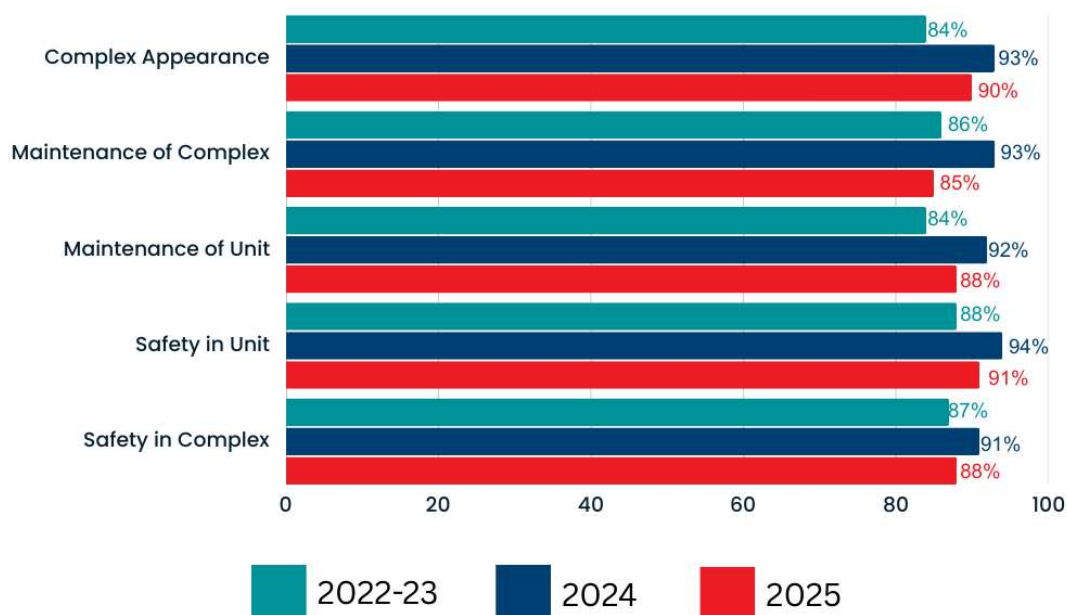
**% of Customer Service Responses (Meets or Exceeds)**  
**AHA Landlords**  
**(2022-23 vs 2024 vs 2025)**



**AHA Tenant Feedback:**

One series of questions related to the 2025 tenant survey applied only to tenants at AHA owned properties. Review below for AHA tenant survey feedback regarding different aspects of property management.

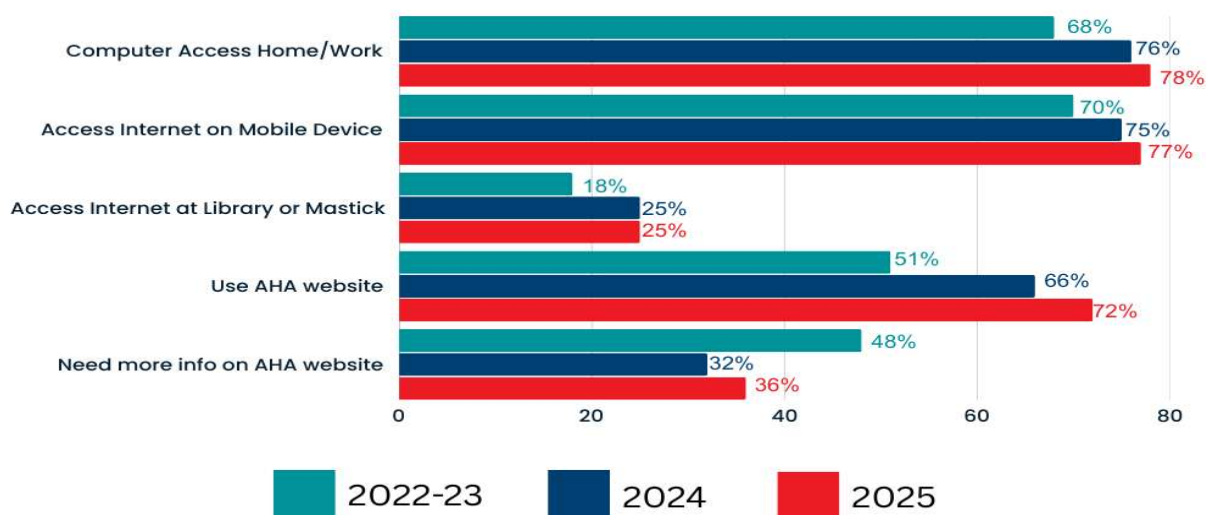
**% of Property Management Responses (Meets or Exceeds)  
AHA Tenants  
(2022-23 vs 2024 vs 2025)**



**Use of Technology:**

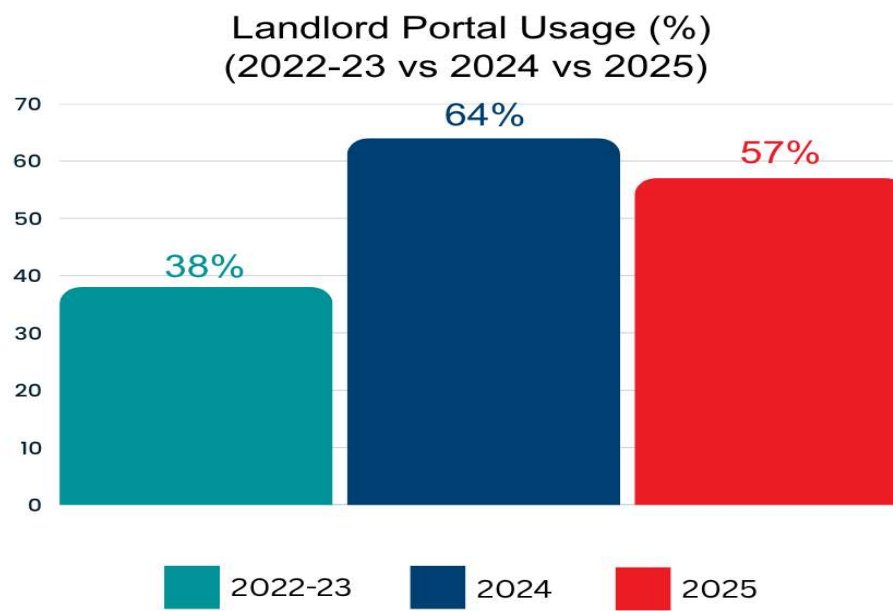
In 2005, questions were added to the landlord, tenant, and program participant survey to elicit information regarding customers' ability to access the internet and information on AHA's website. The responses to the 2025 survey indicate increased access to computers and the internet by landlords, tenants, and program participants. Also, the survey responses demonstrate that AHA's website ([www.alamedahsg.org](http://www.alamedahsg.org)) continues to gain increased engagement by survey respondents and is deemed a helpful online tool, with 36 percent of survey respondents indicating that AHA's website needs more information, compared to 48 percent in 2022-23 and 32 percent in 2024.

## Technology Usage across all Survey Groups (%) (2022-23 vs 2024 vs 2025)



### Landlord Portal Usage:

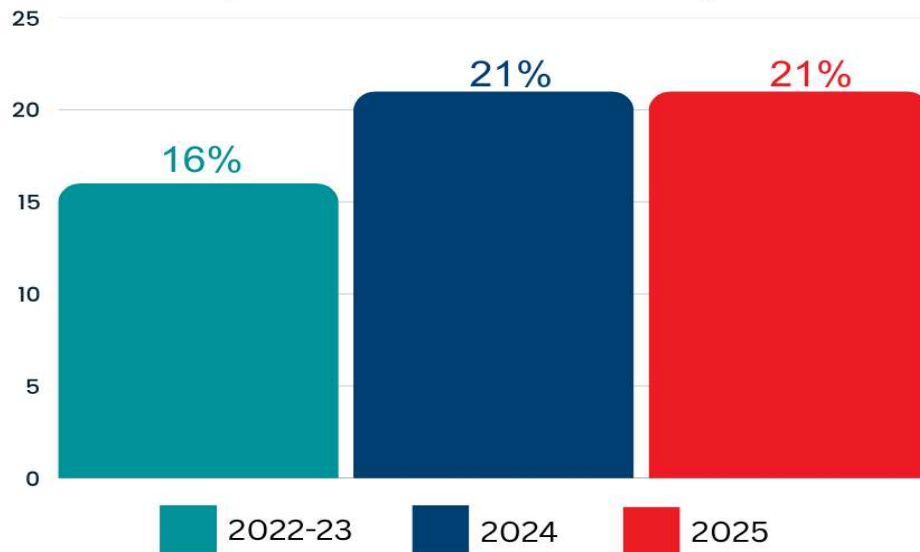
The 2025 survey included a question specific to landlords in which landlords were asked if they have “ever accessed the landlord portal?” The surveyed landlords demonstrated a slight decrease in usage of the landlord portal.



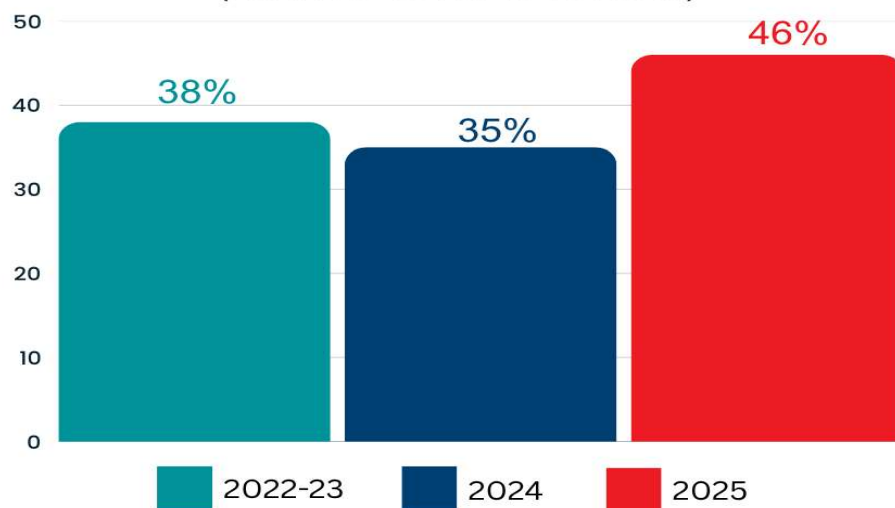
**Health Crisis Questions:**

Similar to the survey in recent years, the 2025 survey for both housing program participants and tenants included three additional questions that related to internet access for families with K-12 children, household food insecurity, and accessing local food resources. Please review the charts below for data related to the internet access for households with K-12 children, food insecurity, and accessing local food resources.

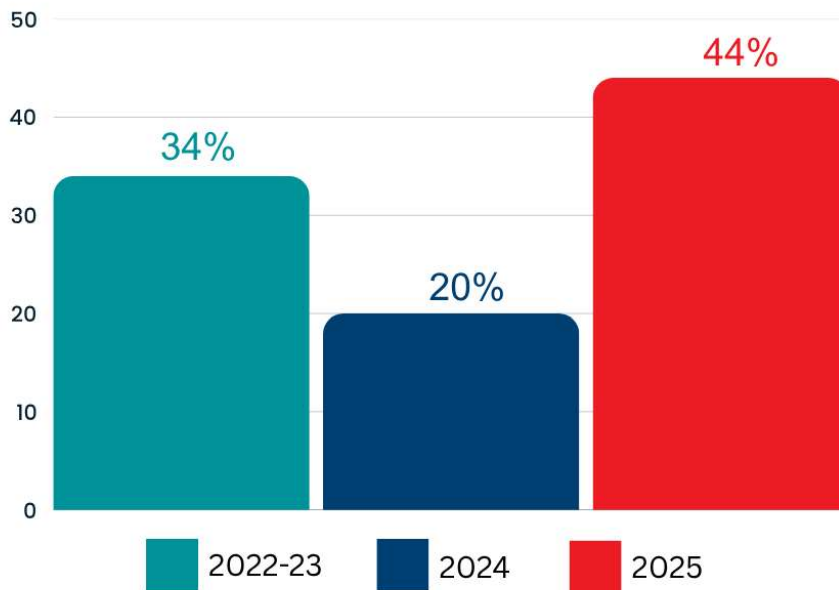
**AHA tenants or AHA Program Participants with food insecurity (%)**  
(2022-23 vs 2024 vs 2025)



**AHA tenants or AHA Program Participants Utilizing the Alameda Food Bank of other organization (%)**  
(2022-23 vs 2024 vs 2025)



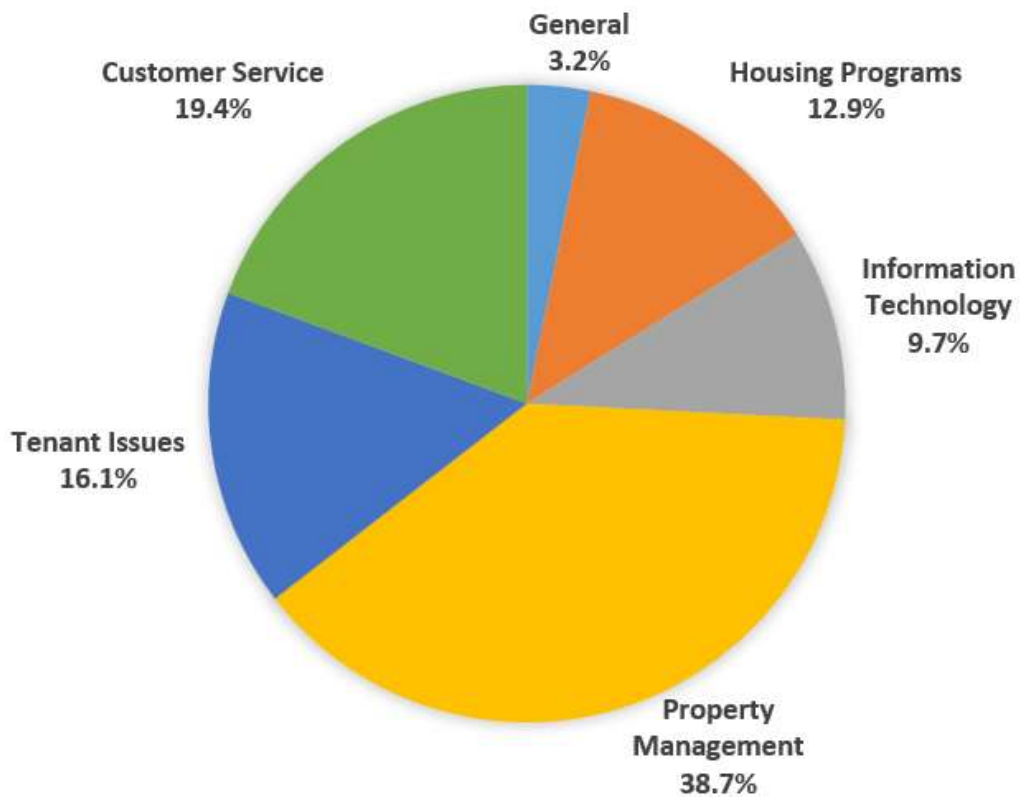
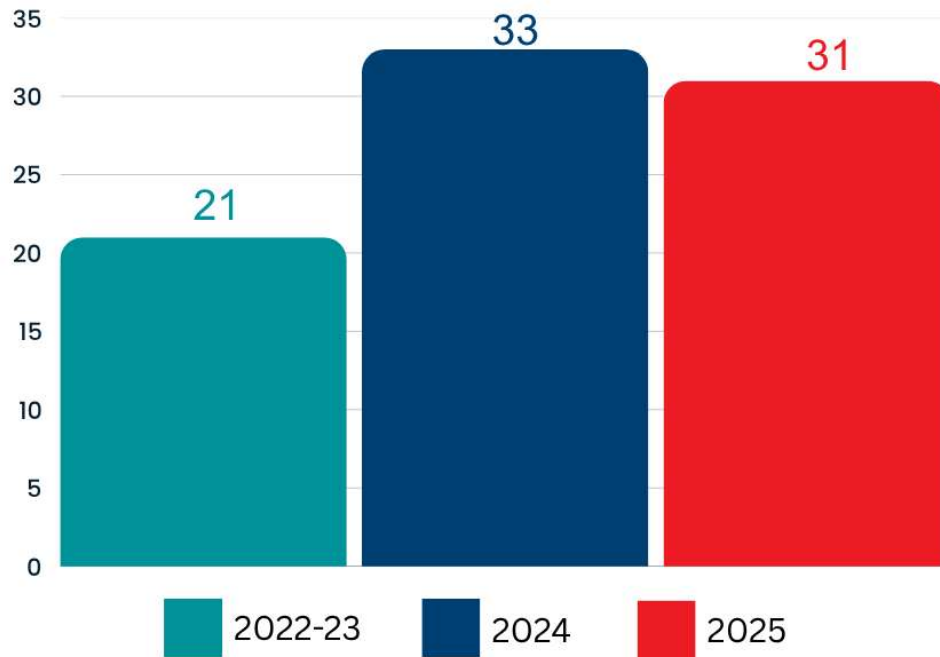
### Households with K-12 kids having access to internet (2022-23 vs 2024 vs 2025) (%)

**Additional Comments:**

On all surveys, survey respondents had the option to submit additional comments on each survey form. The first chart (top) lists total comments submitted within the last three survey cycles (2022-23, 2024, 2025). The second chart (below) categorizes the additional comments by category in the 2025 survey.



### Total Number of Surveys with Additional Comments (2022-23 vs 2024 vs 2025)



### **2025 Customer Survey Report Summary:**

The most popular method to submit the 2025 Customer Survey was via mailed responses, at 65 percent, while 31 percent of all survey submissions were completed via the online form. The survey group that submitted the highest percentage of online surveys were the landlords at 71 percent and housing program participants at 41 percent, while 16 percent of submitted surveys from tenants were via online form.

With a total of 1,443 surveys sent and 186 returned, the response rate was 12.8 percent, which is a dip from the 15.4 percent in 2024, but does align with previous years (12.5 percent in 2016 and 13.1 percent in 2017). The survey groups with the highest response rates included housing program participants at 13 percent and tenants at 14 percent, while we only received a 4 percent response rate from AHA landlords. The 2025 survey was the first ever AHA customer survey to include survey codes which were utilized as a control to identify and exclude any duplicate survey submissions, and perhaps these codes may have had an impact on the survey response rate. No duplicate surveys were identified during the survey process.

The two main goals of AHA's Annual Customer Survey is 1) to ensure that AHA staff and property management staff are delivering the best possible customer experience and 2) AHA properties are well maintained and tenants feel safe in their unit and at their property. The 2025 Customer Survey demonstrated a sharp increase in customer satisfaction overall, as 90 percent of all survey submissions ranked the "overall quality of customer service provided" as meeting or exceeding expectations. Additionally, customer service rankings across the five other questions (Staff Responsiveness, Ability to Reach Staff, Return of Phone Calls, Staff Politeness, Staff knowledge) saw an increase, in comparison to the 2024 Customer Survey, with largest increases related to "return of phone calls" (+7 percent) and "staff knowledge" (+18 percent).

To gain further insight into the customer service rankings, the data includes a ranking breakdown, per each survey group. Some of highlights for the tenant group include that 93 percent of tenant surveys ranked the "overall quality of customer service provided" as meeting or exceeding expectations (an increase of 9 percent from 2024 customer survey). Also, the "ability to reach staff" increased by 8 percent (in comparison to 2024 tenant survey) resulting in 90 percent of all tenant surveys indicating that AHA met or exceeded expectations in "ability to reach staff".

The list of questions specific to AHA tenants produced important data related to property management; and the feedback is positive, as AHA tenants rated AHA in meeting or exceeding expectations across five different categories, including: complex

appearance (90 percent), maintenance of complex (85 percent), maintenance of unit (88 percent), safety in unit (91 percent), and safety in complex (88 percent).

Customer service rankings from housing program participants and landlords also indicated sharp increases in customer service satisfaction as 89 percent of program participant surveys ranked the “overall quality of customer service provided” as meeting or exceeding expectations. While 85 percent of landlord surveys ranked the “overall quality of customer service” provided as meeting or exceeding expectations. Another impressive metric from the landlord response is that 100 percent of landlord surveys ranked “staff politeness” as meeting or exceeding expectations.

The landlord surveys indicated significant increases in customer satisfaction from the 2024 customer survey with “return of phone calls” (up 18 percent in comparison to 2024) and “ability to reach staff” (up 25 percent in comparison to 2024). Still, there is room for improvement as 42 percent of landlord surveyed ranked the “return of phone calls” as meeting or exceeding expectations and 57 percent of landlord surveyed ranked the “ability to reach staff” as meeting or exceeding expectations.

To address the sources of decreased customer satisfaction, indicated in the 2024 Annual Customer Survey among AHA landlords, AHA staff and leadership implemented protocols, trainings, and best practices (listed below) to improve customer service delivery to landlords.

1. Annual customer service training for all AHA staff in customer-facing positions.
2. AHA staff are offering monthly office hours to landlords.
3. HPD implemented a call center-based service model to ensure that incoming calls are answered by a live person.
4. AHA staff increased the frequency of landlord newsletters to quarterly instead of bi-annual.
5. AHA staff are now allowing walk-ins from all applicants, housing program participants, and landlords. Housing Authority staff are available to answer questions at AHA’s main office (701 Atlantic Avenue in Alameda) on Mondays through Thursdays between the hours of 8:30am to 11:30am. No appointment is necessary.

The percentage of surveyed landlords who have accessed the landlord portal increased from 38 percent in 2022-23 to 64 percent in 2024, and now slightly dipped to 57 percent in 2025. As a reminder the 2021 survey, only 13 percent of surveyed landlords were utilizing the landlord portal.

The 2025 survey results indicated that the same percentage (21 percent) of households are experiencing food insecurity in comparison to the 2024 survey. AHA continues to coordinate with the Alameda Food Bank to deliver food weekly to Independence Plaza (first and third Tuesday of each month) and Anne B. Diamant (second and fourth Tuesday of each month). Furthermore, once Estuary I and Linnet Corner are leased up, (later in 2025) both properties will offer tenants bi-weekly food distributions, conducted by LifeSteps, with food sourced from the Alameda Food Bank. A total of 46 percent of surveys from tenants and housing program participants indicated that they are sourcing food from the Alameda Food Bank or another organization, an increase from 35 percent in 2024 and 38 percent in 2022-23.

The Customer Surveys from tenant and housing program participants indicate an increase in households with K-12 children that have internet access, growing from 20 percent in 2024 to 44 percent in 2025.

Furthermore, this 2025 Customer Survey provided the Housing Authority of the City of Alameda with some valuable input (via additional comments) from AHA stakeholders related to customer service and property management. In total, 31 submitted surveys included additional comments, with 38.7 percent of additional comments related to property management and 19.4 percent of additional comments related to customer service.



Housing Authority  
— of the —  
City of Alameda

# Customer Satisfaction Survey

2025 PRESENTATION



# AT A GLANCE

## The Annual Survey

- Survey conducted since 1993
- Categories: Tenants, Landlords, and Program Participants
- Surveys sent to:
  - ✓ 100% of all Tenants (at AHA owned properties)
  - ✓ 33% of all Landlords (random selection)
  - ✓ 33% of all Housing Program Participants (random selection)
- Customized survey for each survey group



# Survey Content

- **Landlord Survey**
  - ✓ Six general customer service questions
  - ✓ Six technology usage questions
  - ✓ One prompt for additional comments
- **Tenant Survey**
  - ✓ Six general customer service questions
  - ✓ Five property management questions
  - ✓ Five technology usage questions
  - ✓ One prompt for additional comments
- **Housing Program Participant Survey**
  - ✓ Six general customer service questions
  - ✓ Six technology usage questions
  - ✓ Two food insecurity questions
  - ✓ One prompt for additional comments

# Changes Since Last Survey

- To improve customer service delivery since the 2024 customer survey, AHA implemented several new protocols, trainings, and best practices; including customer service training (for AHA staff in customer-facing positions), monthly housing search training for new program participants, monthly office hours for landlords, call center for HPD in-bound calls, and walk ins are now allowed Monday-Thursday at 701 Atlantic Avenue.
- AHA added unique survey codes to reduce potential of one respondent submitting multiple survey responses.
- To better identify data trends, AHA included three years of data into the report, all previous years included only two years' worth of data.

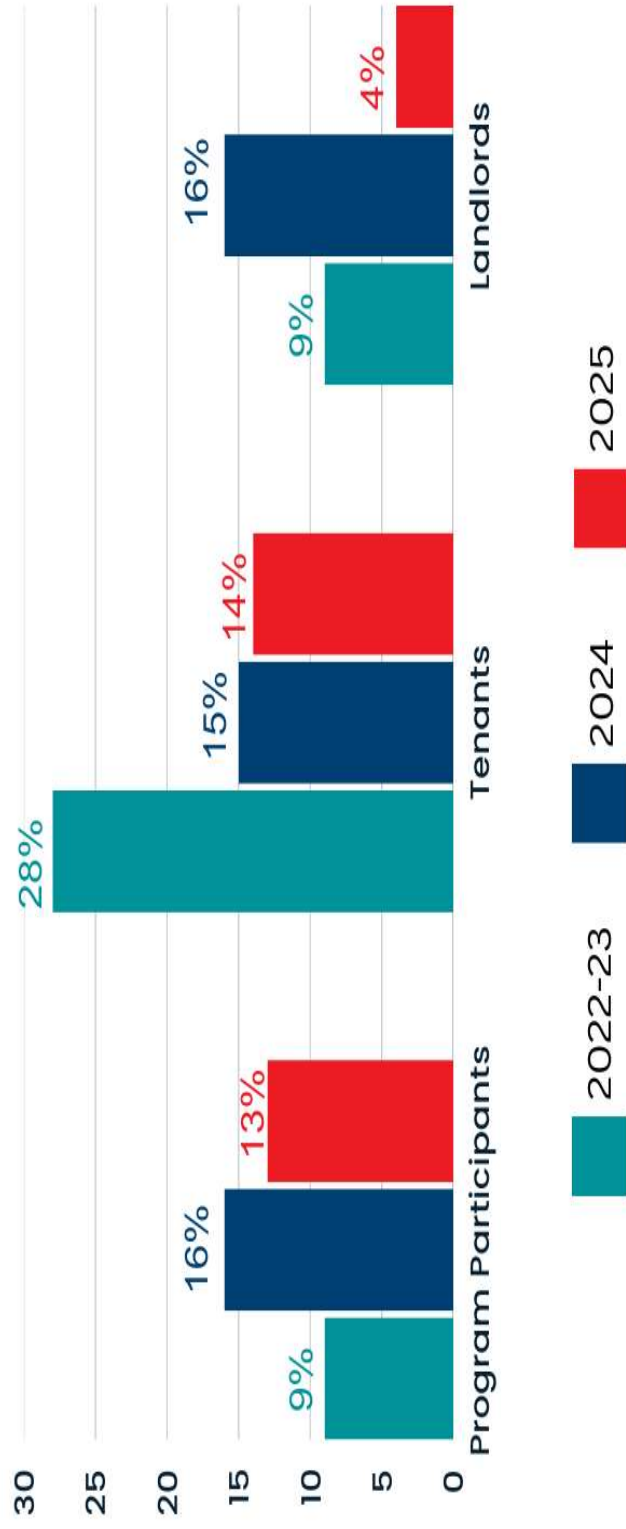


# Survey Response Rates

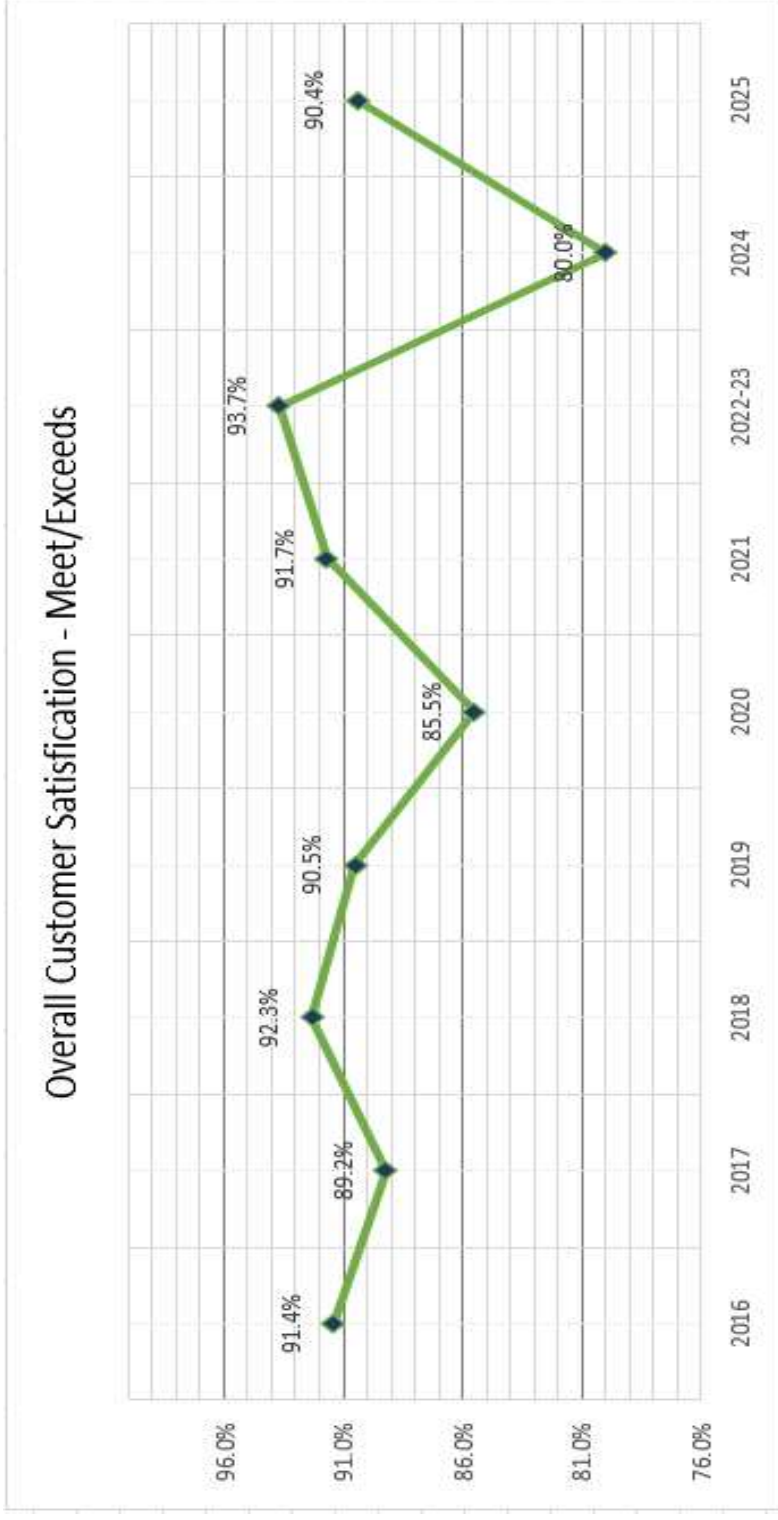


# Survey Response Rates by Group

Response rate by survey group  
(2022-23 vs 2024 vs 2025)



# Overall Customer Satisfaction



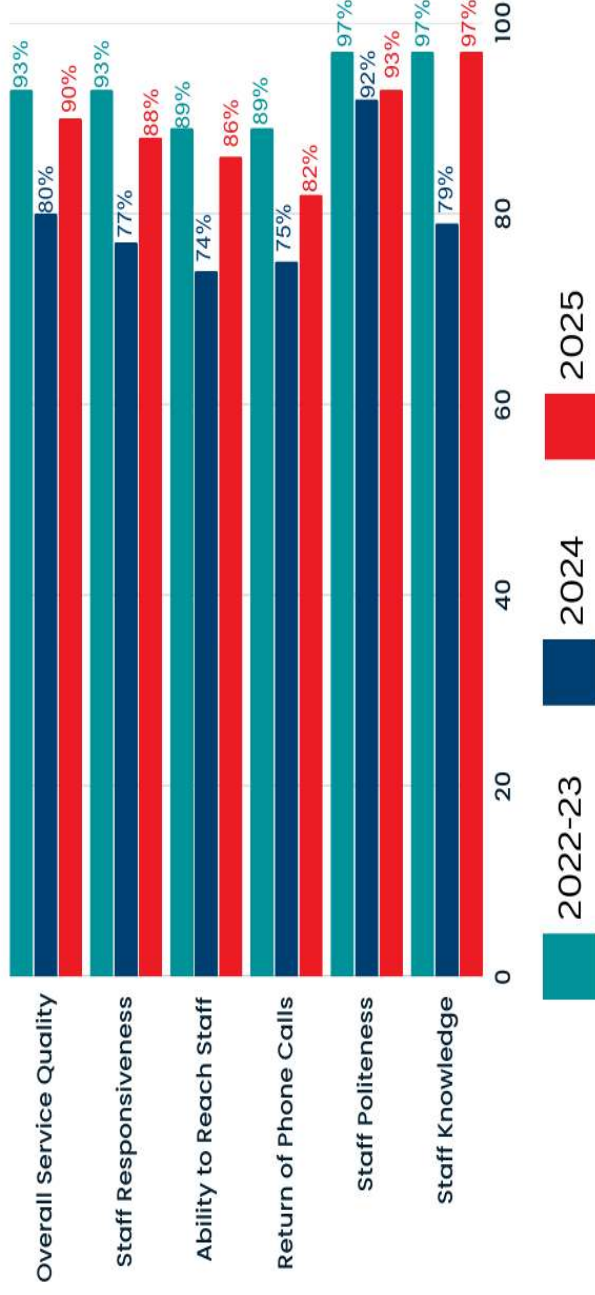
10% Increase in "Meet/Exceeds" responses compared to 2024

# Customer Service Dimensions

% of Customer Service Responses (Meets or Exceeds)

All Survey Groups

(2022-23 vs 2024 vs 2025)



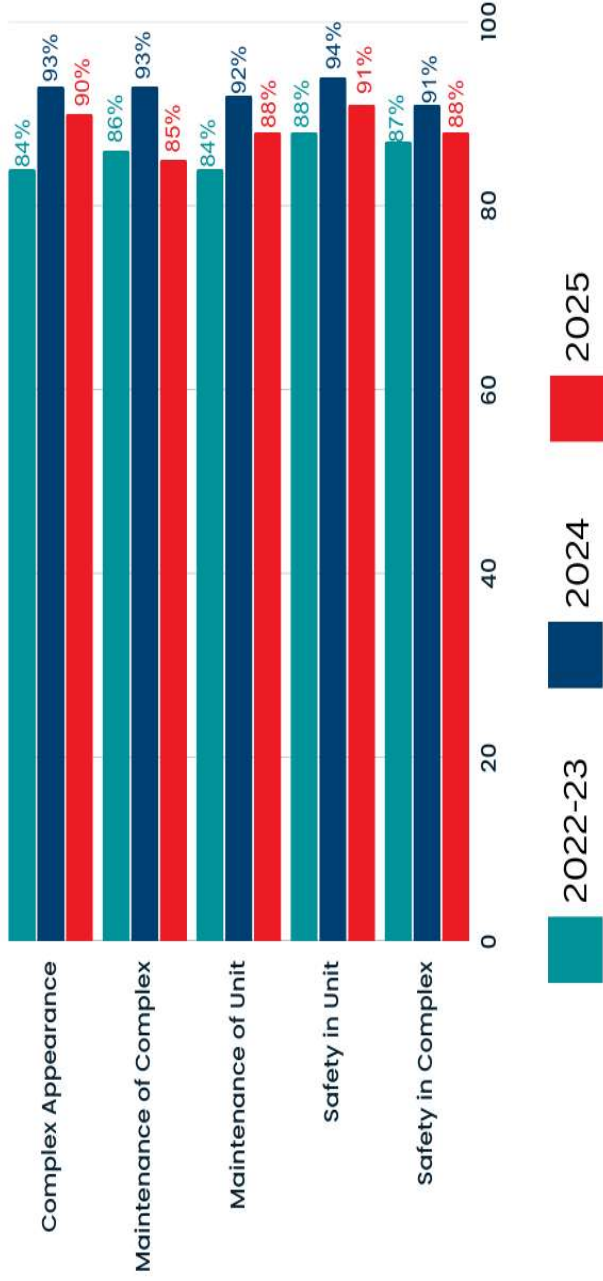
- 12% Increase in "Meet/Exceeds" on **Ability to Reach Staff** ratings, 2025 comparison to 2024
- 18% Increase in "Meet/Exceeds" on **Staff Knowledge** ratings , 2025 comparison to 2024

# Property Management Dimensions

% of Property Management Responses (Meets or Exceeds)

AHA Tenants

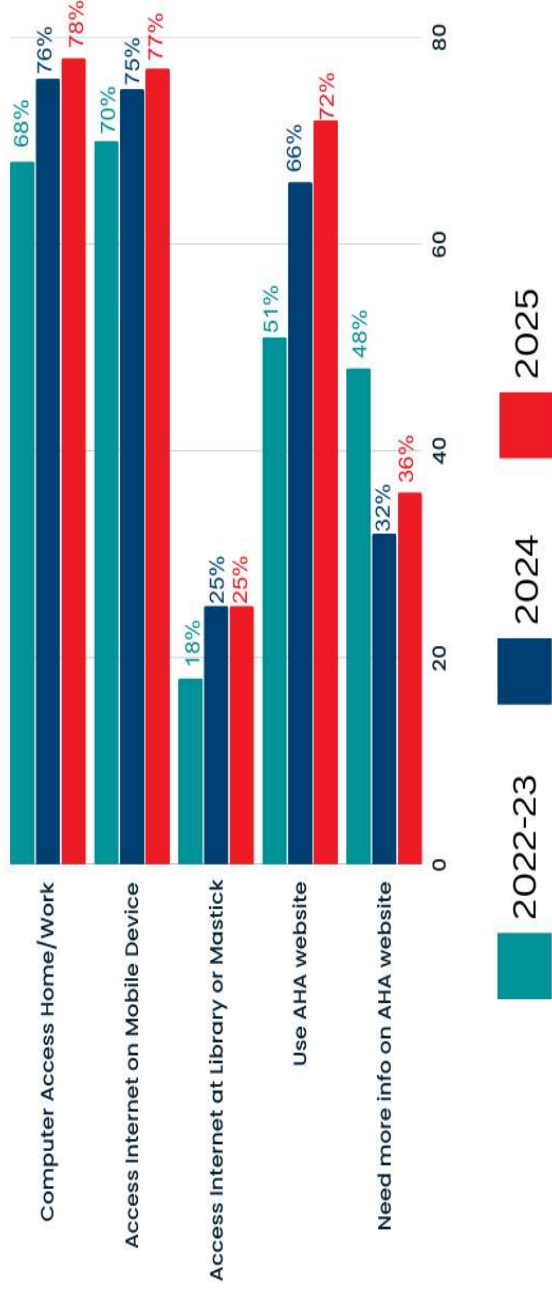
(2022-23 vs 2024 vs 2025)



- 8% Decrease in "Meet/Exceeds" on **Maintenance of Complex** ratings, 2025 comparison to 2024
- 4% Decrease in "Meet/Exceeds" on **Maintenance of Unit** ratings, 2025 comparison to 2024

# Technology Usage

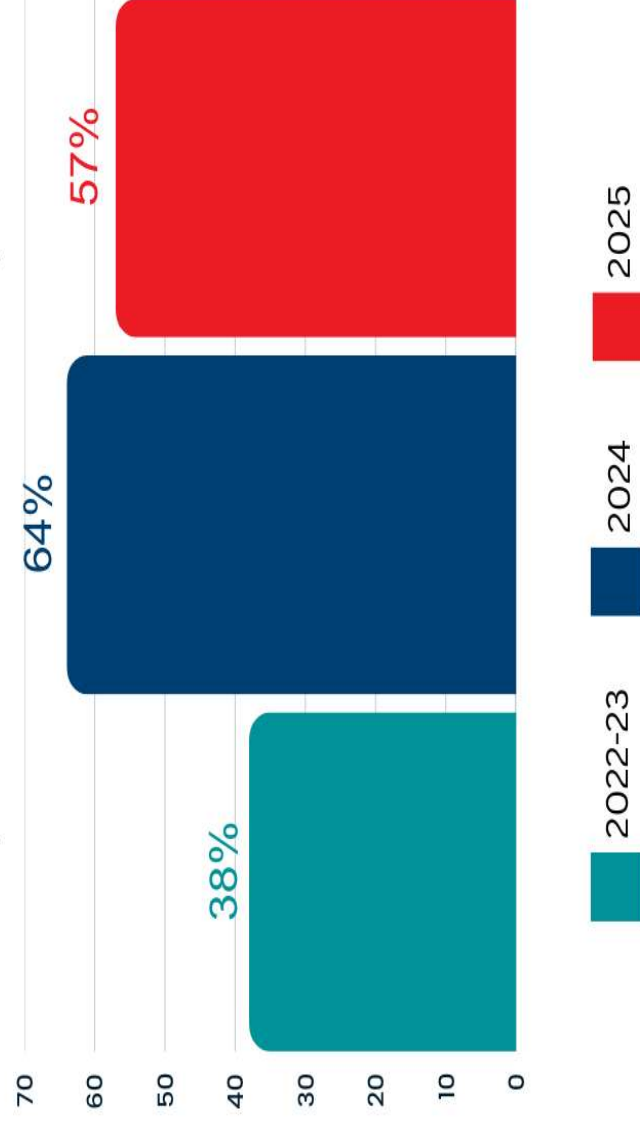
Technology Usage across all Survey Groups (%)  
(2022-23 vs 2024 vs 2025)



- Continued trend with increased computer access and internet access
- 21% increase in AHA website usage since 2022-23

# Landlord Portal Usage

Landlord Portal Usage (%)  
(2022-23 vs 2024 vs 2025)

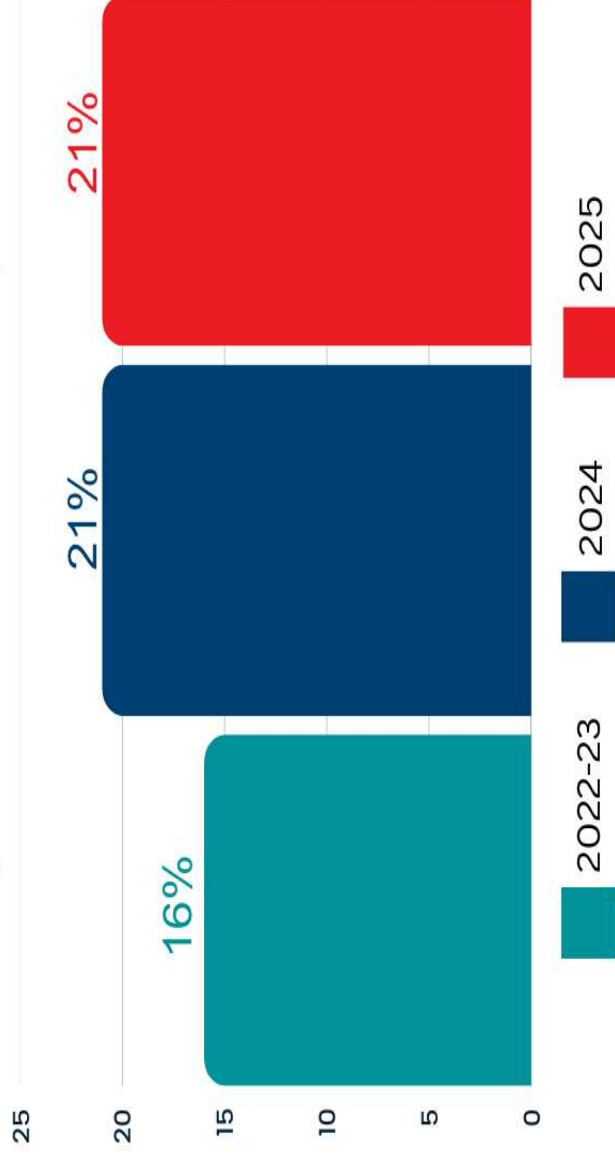


- 7% decrease in landlord portal usage year-to-year, but reminder that in the 2021 survey only 13% of surveyed landlords utilized portal

# Food Insecurity

AHA tenants or AHA Program Participants with food insecurity (%)  
(2022-23 vs 2024 vs 2025)

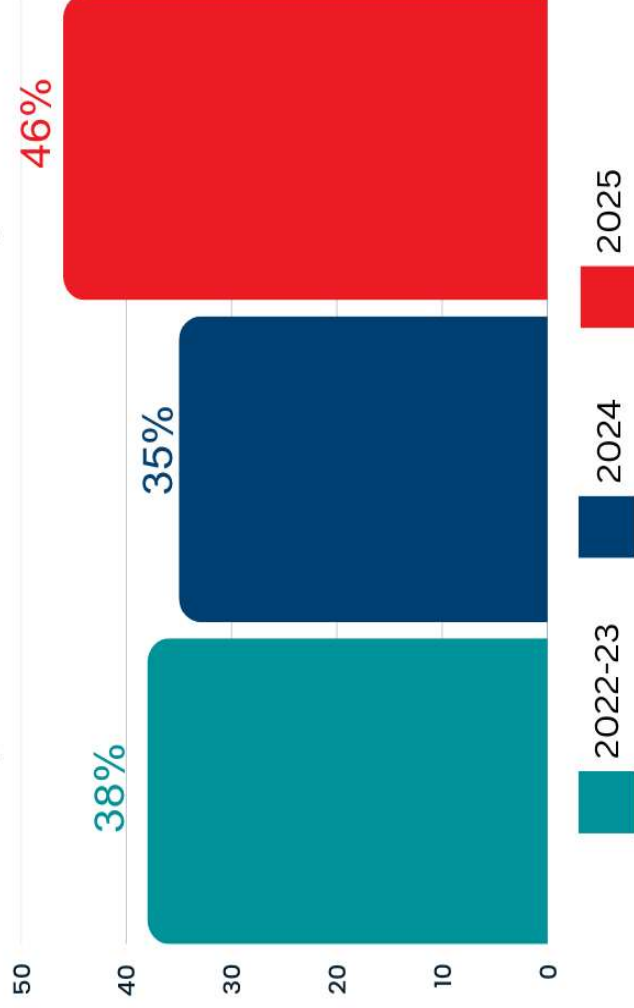
- Roughly 1 in 5 AHA households (tenant or participant) experience food insecurity.





# Utilizing Food Resources

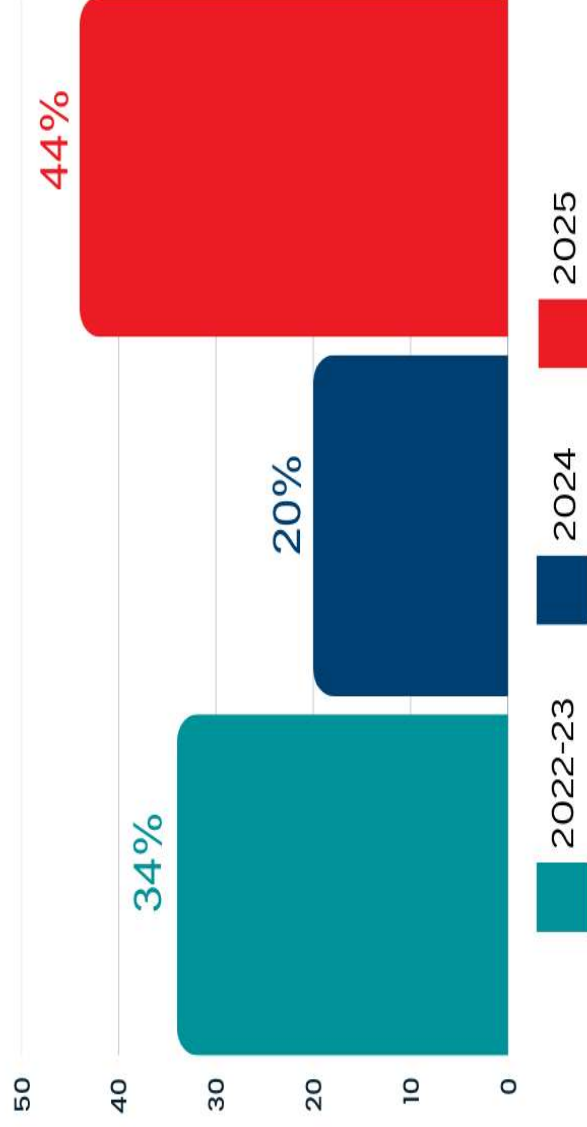
AHA tenants or AHA Program Participants utilizing the Alameda Food Bank or other organization (%)  
(2022-23 vs 2024 vs 2025)



- 11% increase in program participants and tenants utilizing Alameda Food Bank (or other org) year-to-year

# AHA Households with K-12 kids having internet access

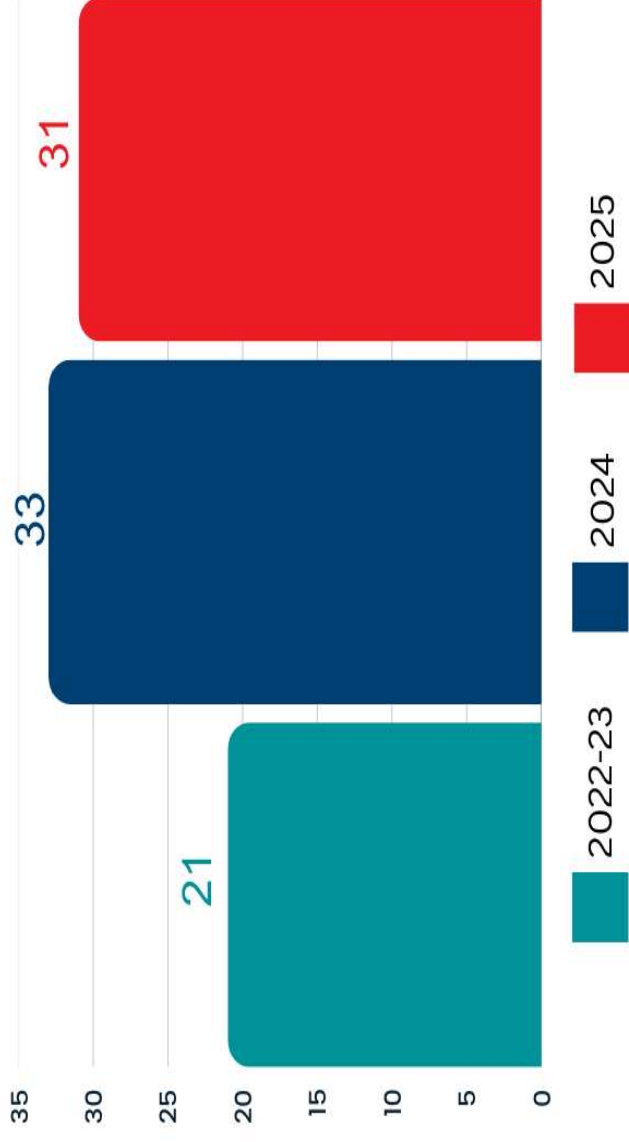
Households with K-12 kids having access to internet  
(2022-23 vs 2024 vs 2025) (%)



- 24% increase in program participant and tenant households with kids K-12 having access to internet

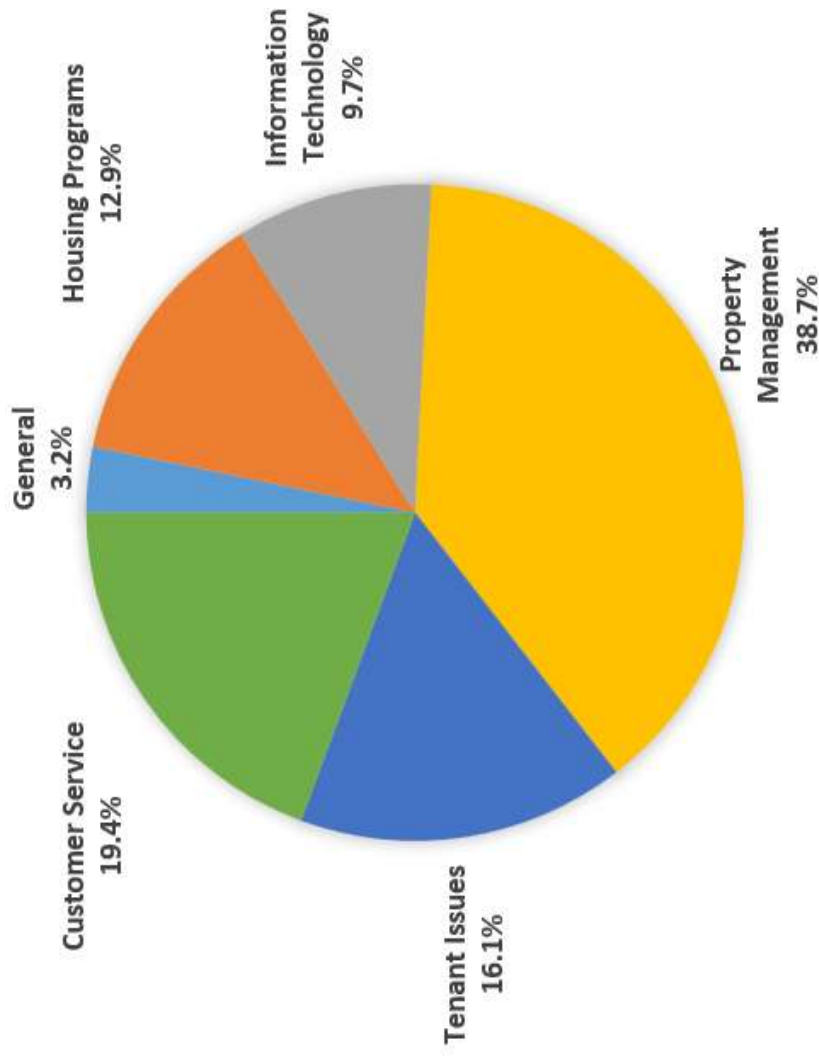
# Additional Comments

Total Number of Surveys with Additional Comments  
(2022-23 vs 2024 vs 2025)



- The 2025 survey aligns with the number of additional comments generated from the 2024 survey

# Additional Comments by Category



# 2025 Survey Highlights

- The 2025 Survey indicated significant improvement in overall customer satisfaction, in comparison to the 2024 Customer Survey with 90 percent of all survey submissions ranking “the overall quality of customer service provided” as meeting or exceeding expectations.
- Customer service rankings across the five other questions (Staff Responsiveness, Ability to Reach Staff, Return of Phone Calls, Staff Politeness, Staff knowledge) saw an increase, in comparison to the 2024 Customer Survey. The largest increases related to “return of phone calls” (+7 percent) and “staff knowledge” (+18 percent).
- Customer service rankings from housing program participants and landlords indicated sharp increases in overall customer service satisfaction, as 89 percent of program participant surveys ranked the “overall quality of customer service provided” as meeting or exceeding expectations. While 85 percent of landlord surveys ranked the “overall quality of customer service” provided as meeting or exceeding expectations.
- The Landlord surveys indicated significant increases in specific customer service elements in comparison to the 2024 customer survey with “return of phone calls” (up +18 percent in comparison to 2024) and “ability to reach staff” (up +25 percent in comparison to 2024).
- The Customer Surveys from tenant and housing program participants indicate an increase in households with K-12 children that have internet access, growing from 20 percent in 2024 to 44 percent in 2025.

# Any Questions?

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Housing Authority  
of the  
City of Alameda

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Sepideh Kiumarsi, Senior Management Analyst

Date: June 18, 2025

Re: Approve Changes to the Administrative Plan.

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### **BACKGROUND**

The Administrative Plan for the Housing Choice Voucher Program (HCV) for the Housing Authority of the City of Alameda (AHA) establishes the policies and procedures whereby AHA will administer HCV tenant-based and project-based rental assistance programs under contract to Department of Housing and Urban Development (HUD) and in accordance with applicable statutes, HUD regulations, and state and local law.

The Housing Authority of the City of Alameda (AHA) was accepted into the Moving to Work (MTW) Demonstration Expansion under the Landlord Incentives Cohort to test the effectiveness of landlord incentives. AHA is required to comply with the MTW Operations Notice while participating in the MTW Demonstration Program. Flexibilities in regulation granted as part of approved MTW activities apply to the Housing Choice Voucher and Project-Based Voucher program including Mainstream, Near Elderly Disabled, and Family Unification Program. AHA must specifically request HUD to extend flexibilities as part of approved MTW activities to the Veteran Affairs Supportive Housing (VASH) program, the Emergency Housing Voucher (EHV) program, and the Stability Voucher (SV) Program.

In 2016, Congress approved the Housing Opportunity Through Modernization Act (HOTMA) which required many changes to the HCV and PBV program. The HOTMA regulations have been released by HUD in batches ever since. As such, some components have already been enacted and others will be effective in 2025 or later. Accordingly, the AHA will bring the Administrative Plan to the Board of Commissioners for the release of each subsequent HOTMA policy change.

### **DISCUSSION**

On May 7, 2024, HUD implemented a final rule as part of HOTMA that implemented changes to the Housing Choice Voucher (HCV) tenant-based program and the Project-Based Voucher (PBV) program for 24 CFR Parts 5, 8, 42, 50, 91, 92, 93, 247, 290, 882, 888, 891, 903, 908, 943, 945, 960, 972, 982, 983, 985, and 1000. Under this final rule,



HUD required Public Housing Authorities (PHAs) to be in compliance by June 6, 2024 except for some sections which HUD delayed indefinitely or postponed until one of the following compliance dates: September 4, 2024, December 3, 2024, or June 6, 2025. The Board previously approved Administrative Plan revisions for changes effective June 6, 2024, September 4, 2024, and December 3, 2024. At this time, AHA is revising the Administrative Plan with the sections that HUD requires PHAs to be in compliance with by June 6, 2025. Please note that while these changes are being approved after June 6, 2025, since the policies are mandated by HUD, AHA began complying with the sections effective June 6, 2025 on June 6, 2025.

On April 9, 2025, HUD issued PIH Notice 2025-08 "Statutory and Regulatory Waivers for Family Unification Program (FUP) and Foster Youth to Independence (FYI) Vouchers." This Administrative Plan revision incorporates mandated changes to the AHA's FUP program listed below:

1. Preferences for the waiting list (Section 8(o)(6)(A) of the United States Housing Act of 1937; 24 CFR 982.207(b));
2. Initial voucher search term (24 CFR 982.303(a));
3. Voucher term extensions (24 CFR 982.303(b)(1); and
4. Referral timeline (Section 8(x)(2) of the United States Housing Act of 1937 (42 U.S.C. 1437f(x)(2))).

To clarify which regulations AHA must comply with when approved MTW flexibilities conflict with provisions in the PBV Housing Assistance Payments contract, AHA has included language, as affirmed by the HUD Local Field Office and the Office of General Counsel, that approved MTW waivers relieve AHA from its obligations to follow any conflicting provisions in the PBV Housing Assistance Payments contract.

As suggested by legal counsel, AHA includes flexibility in the determination of a reasonable accommodation for an additional bedroom for medical needs.

This Administrative Plan revision also consolidates and revises language and timeframes for consistency and clarity throughout the Administrative Plan, such as:

1. Revisions to the formatting of the waiting list;
2. Clarification of the number of days that AHA staff have to process Request for Tenancy Approvals;
3. Reduction in the time AHA staff have from determining that a household is eligible to move to issuing their voucher from 28 days to 14 days; and
4. Revisions to the inspection schedule in accordance with approved MTW flexibilities.

### **FISCAL IMPACT**

The increased voucher term and extension policy for the FUP program could result in more lease-ups, although due to the size of this program and the limited number of



available vouchers, AHA staff expects a minimal increase in costs.

**CEQA**

Not Applicable.

**RECOMMENDATION**

Approve Changes to the Administrative Plan.

**ATTACHMENTS**

1. Attachment A - Administrative Plan Revisions 2025-03

Respectfully submitted,



Sepideh Kiumarsi, Senior Management Analyst

**ADMINISTRATIVE PLAN**

**FOR THE**

**SECTION 8 HOUSING CHOICE VOUCHER PROGRAM**

**OF**

**THE HOUSING AUTHORITY OF THE CITY OF ALAMEDA**

Approved by the Housing Commission: May 18, 2005

Submitted to HUD: May 23, 2005

Last Revised: ~~June~~April 18~~6~~, 2025

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## GLOSSARY 1

### **3-I.B. FAMILY AND HOUSEHOLD [24 CFR 5.403, HUD-50058 INSTRUCTION BOOKLET (2001), P. 14]**

The terms *family* and *household* have different meanings in the HCV program.

#### **Family**

To be eligible for assistance, an applicant must qualify as a family.

*Family* includes, but is not limited to, the following, regardless of actual or perceived sexual orientation, gender identity, or marital status:

1) A single person, who may be:

i) an elderly person, displaced person, disabled person, near-elderly person, or any other single person; or

ii) An otherwise eligible youth between 18 and 24 years of age, inclusive, who has left foster care or who will leave foster care within ~~180~~90 days, in accordance with a transition plan described in section 475(5)(H) of the Social Security Act (42 U.S.C. 675(5)(H)), and is homeless or is at risk of becoming homeless at age 16 or older; or

2) A group of persons residing together, and such group includes, but is not limited to:

i) a family with or without children (including a child who is temporarily away from the home because of placement in foster care);

ii) an elderly family;

iii) a near-elderly family;

iv) a disabled family;

v) a displaced family; and

vi) the remaining member of a tenant family.

The AHA has the discretion to determine if any other group of persons qualifies as a family.

Each family must identify the individuals to be included in the family at the time of application and must update this information if the family's composition changes.

To qualify as a family when proposed family members are not related by blood, marriage, adoption, or other operation of law, the AHA will require applicants to demonstrate that the individuals have lived together previously and certify that each individual's income and other resources will be available to meet the needs of the family.

The addition of a new family member on an application or into an assisted household will be limited to birth, adoption, court-awarded custody, legal guardianship, marriage, civil union, registered domestic partnership or other operation of law, or reasonable accommodation.

#### **Household**

#### **4-III.A. OVERVIEW**

As vouchers or PBV units become available, families on a waiting list will be selected for assistance in accordance with the policies described in this part.

The order in which families receive assistance from the waiting list depends on the selection method chosen by the AHA and is impacted in part by any selection preferences for which the family qualifies. The source of funding also may affect the order in which families are selected from the waiting list.

The AHA will maintain a clear record of all information required to verify that the family is selected from the waiting list according to the AHA's selection policies [24 CFR 982.204(b) and 982.207(e)].

#### **4-III.B. SELECTION AND FUNDING SOURCES**

##### **Special Admissions** [24 CFR 982.203]

HUD may award funding for specifically named families living in specified types of units (e.g., a family that is displaced by demolition of public housing). In these cases, the AHA may admit families that are not on the waiting list, or without considering the family's position on the waiting list. The AHA must maintain records showing that such families were admitted with special program funding.

##### **Targeted Funding** [24 CFR 982.204(e)]

HUD may award the AHA funding for a specified category of families on the waiting list. The AHA must use this funding only to assist the families within the specified category. Within this category of families, the order in which such families are assisted is determined according to the policies provided in Section 4-III.C.

The AHA administers the following types of targeted funding:

- Mainstream Program
- Shelter Plus Care Program
- Bessie Coleman Mod Rehab Program
- Family Unification Program
- Veterans Affairs Supportive Housing (VASH)
- Emergency Housing Vouchers (EHV)
- Stability Vouchers

##### **Regular HCV Funding**

Regular HCV funding may be used to assist any eligible family on the HCV or any of the PBV waiting lists. In the case of a funding shortage, however, PBV assistance will be provided before HCV assistance. Families are selected from the waiting list according to the policies provided in Section 4-III.C.

#### **4-III.C. SELECTION METHOD**



The AHA will describe below the method for selecting applicant families from the waiting list, including the system of admission preferences that will be used [982.202(d)] in the following sections.

When a vacancy exists at a PBV site, the AHA will notify the next families on the applicable waiting list. The AHA's letter to the applicants also will state that if the applicant is interested in residing in the vacant PBV unit, that the applicant will not lose her or his place on the AHA's HCV waiting list.

Applicants indicating interest in the PBV unit may be prescreened by the AHA for Section 8 eligibility. Applicants will be referred to the owner in the order in which the screening has been completed or by position number if AHA and owner screening are completed simultaneously. However, if the tenant selection criteria of the owner include screening for credit and criminal background, these procedures may be performed prior to completion of the full assistance eligibility process. If, on the basis of property owners screening for suitability, including, the credit and criminal background screening process, the owner will not offer tenancy to the applicant, the AHA will not complete the voucher eligibility process and the applicant will be removed from the selected grouped site-based project-based waiting list and sent a notice to this effect.

Waiting list referrals to the PBV owner may remain active for consideration for a PBV vacancy for a period of 120 days from the date of selection from the waiting list. Referred tenants will be screened by the owner and readied for occupancy. If the owner provides documentation of outreach to all applicants at the same time, first ready, is first referred back to the AHA for eligibility determination and leasing. Any abnormalities in outreach will result in owners being required to process in waiting list order. Readiness is defined to mean having met all of the owner's screening criteria and accepted for tenancy.

In the event that multiple families are made ready for a PBV unit, as a tie breaker for who is assigned the unit, the family who has the highest rank from the referral list of all "ready" families will be processed by the AHA for eligibility determination and offered the available unit.

An owner may continue to work on suitability screening for up to three families from the latest referral list in anticipation of any additional vacancies that may arise during the 120-day referral period. The AHA may also continue the eligibility process for any family made ready by the owner. The AHA will return the family to the waiting list if it is a grouped waiting list and other vacancies are anticipated.

If no unit is scheduled to be vacated by an existing tenant or there are no impending vacancies prior to the expiration of the 120-day period, all unassigned referrals will be returned to the project's PBV waiting list. If there are vacancies at other PBV units on the same waiting list, the family may be referred to the second owner or returned to the waiting list earlier than the 120-day period.

If the AHA referrals do not provide the PBV owner with a suitable tenant for the unit and the waiting list is exhausted, the owner may refer a Section 8 eligible individual or family to the AHA's grouped site-based PBV waiting list if it is open. The referred family must meet the AHA's Section 8 eligibility criteria. See chapter 16 for other options when the waiting list is exhausted.

If any PBV waiting list has been exhausted, and prior to opening the waiting list for targeted outreach, the AHA may query HCV tenants to see if any tenant-based assisted household is interested in a PBV unit. Admission to the PBV program for HCV Tenants will be on a first ready, first served basis. Any additional HCV tenant families interested in PBV units will be informed that the unit(s) has been leased and no further action will be taken on their behalf.

PBV Waiting list applicants shall have priority over all HCV assisted tenants for PBV units.

PBV units approved under the Request for Proposals to supply units for VASH-eligible households can only be filled with families referred by the VA as allowed under the VASH program. As VASH tenant-based and project-based families are referred by the VA, the VA maintains all waiting lists for this program.

### **Local Preferences and Point Values [24 CFR 982.207]**

HUD allows housing authorities to establish local preferences, and the AHA has established local preferences, that give priority to serving families that meet those criteria. All local preferences are consistent with the AHA plan and the consolidated plan, and are based on local housing needs and priorities that are documented by generally accepted data sources.

The AHA has established local preferences for the HCV Program, the PBV Program at the Alameda Point Collaborative (APC) Property, the PBV Program at Jack Capon Villa (JCV), the PBV Program at Park Alameda (PA), the Restore Rebuild (formerly Faircloth to RAD-) PBV Program, and the PBV Program at all other sites.

In accordance with PIH Notice 2025-08 issued April 9, 2025, the AHA can not apply any residency preference to FUP and FYI vouchers applicants.

These preferences and their point values are:

#### Waiting List for the Housing Choice Voucher Program:

- FUP Graduates (25 Points)
- Special Provisions (12 points)
- Displaced (9 points)
- Terminated (7 points)
- Residency (6 points)
- Family (3 points)
- Veteran (2 points)

#### Waiting List for Project-Based Voucher Units at Alameda Point Collaborative and Jack Capon Villa:

- Supportive Services (10 points)
- Displaced (9 points)
- Terminated (7 points)
- Residency (6 points)
- Family (3 points)
- Veteran (2 points)

Waiting List for Project-Based Voucher Units at Park Alameda:

- In Place (55 points)
- Disability-specific Supportive Services (10 points)
- Displaced (9 points)
- Terminated (7 points)
- Residency (6 points)
- Family (3 points)
- Veteran (2 points)

Waiting List for Project-Based Voucher Units in the Restore Rebuild Program:

- In Place (55 points)
- Elderly (25 points)
- Displaced (9 points)
- Terminated (7 points)
- Residency (6 points)
- Veteran (2 points)

Waiting List for Project-Based Voucher Units at Properties with an Elderly Preference:

- In Place (55 points)
- Elderly (25 points)
- Displaced (9 points)
- Terminated (7 points)
- Residency (6 points)
- Family (3 points)
- Veteran (2 points)

Waiting List for Project-Based Voucher Units at All Other Sites:

- Displaced (9 points)
- Terminated (7 points)
- Residency (6 points)
- Family (3 points)
- Veteran (2 points)

<u>HGV Program</u>	<u>PBV Program at APC &amp; JCV</u>
<u>FUP Graduates (25 Points)</u>	<u>Supportive Services (10 points)</u>
<u>Special Provisions (12 points)</u>	<u>Displaced (9 points)</u>
<u>Displaced (9 points)</u>	<u>Terminated (7 points)</u>
<u>Terminated (7 points)</u>	<u>Residency (6 points)</u>

<del>Residency (6 points)</del> _____	<del>Family (3 points)</del> _____
<del>Family (3 points)</del> _____	<del>Veteran (2 points)</del> _____
<del>Veteran (2 points)</del> _____	

<del>PBV Program at PA</del> _____	<del>PBV Program at Other</del> _____
<del>In Place (55 points)</del> _____	<del>Displaced (9 points)</del> _____
<del>Disability-specific Supportive</del> _____	<del>Terminated (7 points)</del> _____
<del>Services (10 points)</del> _____	<del>Residency (6 points)</del> _____
<del>Displaced (9 points)</del> _____	<del>Family (3 points)</del> _____
<del>Terminated (7 points)</del> _____	<del>Veteran (2 points)</del> _____
<del>Residency (6 points)</del> _____	
<del>Family (3 points)</del> _____	
<del>Veteran (2 points)</del> _____	

<del>PBV Faircloth to RAD Program</del> _____	<del>PBV Program at Properties with an</del> _____
<del>In Place (55 points)</del> _____	<del>Elderly Preference</del> _____
<del>Elderly (25 points)</del> _____	<del>In Place (55 points)</del> _____
<del>Displaced (9 points)</del> _____	<del>Elderly (25 points)</del> _____
<del>Terminated (7 points)</del> _____	<del>Displaced (9 points)</del> _____
<del>Residency (6 points)</del> _____	<del>Terminated (7 points)</del> _____
<del>Veteran (2 points)</del> _____	<del>Residency (6 points)</del> _____
_____	<del>Family (3 points)</del> _____
_____	<del>Veteran (2 points)</del> _____

Preference points are aggregated to produce the total preference points for each applicant. Applicants with the same total preference points will then be sorted by the method in which they were selected to be placed on the waiting list (i.e., date and time of application or order of random selection). Applicants that have been randomly selected for placement on a waiting list must contact the AHA to notify staff of any change in status. If an applicant submits a change in status that results in a change in preference, the preference must be verified prior to any change in placement on a waiting list. Changes to preference points will be applied to the next available waiting list pull.

FUP Graduates. Emancipated Youth assisted with Family Unification Program (FUP) funding pursuant to FUP regulations dated 2009 or later who were given rental assistance

give the family any right to participate in the AHA's housing choice voucher program [Voucher, form HUD-52646]

A voucher can be issued to an applicant family only after the AHA has determined that the family is eligible for the program based on information received within the 60 days prior to issuance [24 CFR 982.201(e)] and after the family has attended an oral briefing [HCV 8-1].

Vouchers will be issued to eligible applicants at the mandatory briefing.

The AHA should have sufficient funds to house an applicant before issuing a voucher. If funds are insufficient to house the family at the top of the waiting list, the AHA must wait until it has adequate funds before it calls another family from the list [HCV GB Housing Search and Leasing pg. 15]. If the AHA determines that there is insufficient funding after a voucher has been issued, the AHA may rescind the voucher and place the affected family back on the waiting list.

### **Voucher Rescission**

If, due to budgetary constraints, the AHA must rescind vouchers that have already been issued to families, the AHA will do so according to the instructions under each of the categories below. The AHA will first rescind vouchers that fall under Category 1. Vouchers in Category 2 will only be rescinded after all vouchers under Category 1 have been rescinded.

Category 1: Vouchers issued to new admissions to the HCV program for which a Request for Tenancy Approval (RFTA) and proposed lease have not been submitted to the AHA. Vouchers will be rescinded in order of the date and time they were issued, starting with the most recently issued vouchers.

Category 2: Vouchers issued to new admissions to the HCV program for which a RFTA and proposed lease have been submitted to the AHA. Vouchers will be rescinded in order of the date and time the RFTA was submitted to the AHA, starting with the most recently submitted requests.

Families who have their voucher rescinded will be notified in writing and will be reinstated to their former position on the waiting list. When funding is again available, families will be selected from the waiting list in accordance with AHA policies described in Chapter 4.

Families who are continuing participants in the HCV program who have vouchers because they are moving will not have their vouchers rescinded unless the family is terminated due to the date of admission to the program (see chapter 12).

## **5-II.E. VOUCHER TERM, EXTENSIONS, AND SUSPENSIONS**

### **Voucher Term [24 CFR 982.303]**

The initial term of a voucher will be 180 calendar days. The initial term must be stated on the voucher [24 CFR 982.303(a)].

The family must submit a Request for Tenancy Approval and proposed lease within the time period unless the AHA grants an extension.

### **Extensions of Voucher Term [24 CFR 982.303(b)]**

The AHA has the authority to grant extensions of search time, to specify the length of an extension, and to determine the circumstances under which extensions will be granted. In some cases, voucher extensions may require the family to submit new verifications for income, assets, or deductions.

The AHA will approve additional search time if needed as a reasonable accommodation to make the program accessible to and usable by a person with disabilities. The extension period must be reasonable for the purpose. The family will be notified in writing of the AHA's decision to approve or deny an extension. The AHA's decision to deny a request for an extension of the voucher term is not subject to informal review [24 CFR 982.554(c)(4)].

The decision to allow additional extensions beyond 180 days must be approved by the Executive Director in cases of new applicants. The family must demonstrate that its due diligence in trying to locate a unit was met by providing the AHA a listing of all units looked at and all contacts with landlords made before any extensions will be considered. The AHA must also be able to document that the market has higher rents than voucher holders can afford or there is a shortage of rental units available.

For participants transferring units, 24 CFR 982.312 only allows for a family to be absent from a unit for 180 consecutive days; therefore, the AHA will only allow extensions to this time unless in case of a reasonable accommodation due to a disability.

The AHA will allow for voucher extensions for the occurrence of domestic violence, dating violence, sexual assault or stalking which leads to the break-up of the assisted family, as per HUD Notice PIH-2017-08.

As stated in PIH Notice 2025-08 issued April 9, 2025, for FUP vouchers only, the AHA must, on at least one occasion after voucher issuance, notify the applicant prior to the initial term expiration to remind them of the term expiration date, the process for requesting an extension, and to inquire if the applicant is in need of assistance with their housing search. Additionally, for FUP vouchers only, the AHA must approve the first extension of the voucher term, which will be for 90 days, regardless of how the request is made or when it is made (written or oral), as long as the request is made on or before the term expiration date and is consistent with applicable requirements. Any additional voucher extensions for FUP vouchers beyond the first extension must follow the policies and procedures above.

### **Suspensions of Voucher Term [24 CFR 982.303(c)]**

The AHA must provide for suspension of the initial or any extended term of the voucher from the date that the family submits a RFTA until the date the AHA notifies the family in writing whether the request has been approved or denied. "Suspension" means stopping the clock on a family's voucher term from the time a family submits the RFTA until the time the AHA approves or denies the request [24 CFR 982.4]. The AHA's determination not to extend a voucher term is not subject to informal review [24 CFR 982.554(c)(4)].

When the AHA denies a request for tenancy, the family will be notified immediately that the clock on the voucher term has restarted. The notice will include the new expiration date of the voucher.



## **8-I-H. VIOLATION OF HQS SPACE STANDARDS [24 CFR 5.703(D)(5)]**

Units assisted under the HCV or PBV programs must have at least one bedroom or living/sleeping room for each two persons. A living room may be used as sleeping (bedroom) space, but no more than two persons may occupy the space [HCV GB p. 10-6]. Each habitable room must have two working outlets or one working outlet and a permanent light. HUD defines a habitable room as a room in a building for living, sleeping, eating, or cooking, but excluding bathrooms, toilet rooms, closets, hallways, storage or utility spaces, and similar areas [FR Notice 5/11/23].

A unit that does not meet these space standards is defined as overcrowded.

If the AHA determines that a unit does not meet HQS space standards because of an increase in family size or a change in family composition, the AHA will issue the family a new voucher, and the family and AHA will try to find an acceptable unit as soon as possible. If an acceptable unit is available for rental by the family, the AHA must terminate the HAP contract in accordance with its terms.

## **PART II: THE INSPECTION PROCESS**

### **8-II.A. OVERVIEW [24 CFR 982.405]**

#### **Types of Inspections**

The AHA conducts the following types of inspections as needed. Each type of inspection is discussed in the paragraphs that follow.

- *Initial Inspections.* The AHA conducts initial inspections in response to a request from the family to approve a unit for participation in the HCV program. The unit must pass the HQS inspection before the effective date of the HAP Contract.

For units being added or substituted under a project-based HAP contract, these units must pass the HQS inspection before being added or substituted under the contract.

Self-certification cannot be used on failures of an initial inspection.

- *Pre-Qualifying Initial Inspections.* For participants in the HCV, PBV, FUP, EHV, and SV programs (as allowed under MTW) and VASH program (as allowed under the HUD-VASH Operating Requirements), the AHA will allow initial inspections of units to be conducted up to 90 days prior to unit lease-up. The unit must pass the HQS inspection before the effective date of the HAP Contract. Participants or landlords can request a special (interim) inspection at any time.
- *Periodic Inspections.* The AHA will inspect each unit under lease at least once every three years to confirm that the unit still meets HQS. The inspection may be conducted in conjunction with the family's regular reexamination but also may be conducted separately. The AHA may elect to inspect more frequently if the owner or unit has a history of failing HQS inspections. Periodic inspection schedule will be determined by program:
  - *Annual Inspections:* Moderate Rehabilitation Single Room Occupancy Units

- *Biennial Inspections:* Families and participants in the Shelter Plus program Care program, VASH and EHV programs
- *Risk-Based Triennial Inspections:* Families and participants in the HCV (tenant-based only), PBV, FUP, VASH, EHV, and SV programs as allowed under the AHA's approved- MTW activity. If a household passes their first triennial inspection they will remain on the triennial inspection schedule. If a household fails their first triennial inspection, they will have another inspection the following year. As such, the periodic inspection schedule for households is dependent on the result of the first inspection and the inspection schedule can change accordingly each time.

Under the project-based voucher program, the AHA can inspect a random sample of units at each property, consisting of at least 20 percent of the contract units in each building to determine if the contract units and the premises are maintained in accordance with HQS. If more than 20 percent of the annual sample of inspected contract units in a building fail the first annual inspection, the AHA will inspect all of the contract units in the building.

The AHA reserves the right to inspect any units on an annual basis rather than a biennial or triennial basis.

- *Special Inspections.* A special (interim) inspection may be requested by the AHA, owner, the family, or a third party between inspections.

Participants and landlords can request a special inspection at any time. A special inspection can be initiated by the AHA, if it receives indications that the family's unit is not in compliance with HQS. HUD or other third parties may require special inspections for program compliance.

- *Quality Control Inspections.* HUD requires that a sample of units be reinspected by a supervisor or other qualified individual to ensure that HQS are being enforced correctly and uniformly by all inspectors. A representative sample of both tenant-based and project-based units will be inspected.

#### **Inspection of AHA-owned Units** [24 CFR 982.352(b), Federal Register / Vol. 82, No. 134 / Friday, July 14, 2017]

The AHA has obtained the services of an independent entity to perform all HQS inspections in cases where a family is receiving assistance in an AHA-owned unit. An AHA-owned unit is defined as a unit (1) Owned by the AHA; (2) owned by an entity wholly controlled by the AHA (such as Alameda Affordable Housing Corporation); or (3) owned by a limited liability company (LLC) or limited partnership in which the AHA (or an entity wholly controlled by the AHA) holds a controlling interest in the managing member or general partner. The independent entity must communicate the results of each inspection to the family and the AHA. The independent entity has been approved by HUD. The independent entity will provide the AHA and the San Francisco Field Office with the inspection reports.

The AHA may opt to schedule inspections to be completed at the anniversary date of the HAP contract, annually, biennially, or triennially from the last inspection date.



Separate non-lease agreements that involve additional items, appliances or other services may be considered amenities offered by the owner and may be taken into consideration when determining the reasonableness of the rent for the property.

### **AHA Review of Lease**

The AHA will review the dwelling lease for compliance with all applicable requirements.

If the dwelling lease is incomplete or incorrect, the AHA will notify the family and the owner of the deficiencies. Missing and corrected lease information will be accepted by e-mail, in-person, by mail, by fax, or by phone.

Because the initial leasing process is time-sensitive, the AHA will attempt to communicate with the owner and family by phone, through the landlord portal, or by email. The AHA will use mail when the parties cannot be reached by other methods.

The AHA is permitted, but is not required, to review the lease to determine if the lease complies with State and local law and is permitted to decline to approve the tenancy if the AHA determines that the lease does not comply with State or local law [24 CFR 982.308(c)].

The AHA will not review the owner's lease for compliance with state/local law.

### **9-I.F. TENANCY APPROVAL [24 CFR 982.305]**

After receiving the family's Request for Tenancy Approval, with proposed dwelling lease, the AHA must promptly notify the family and owner whether the assisted tenancy is approved.

Prior to approving the assisted tenancy and execution of a HAP contract, the AHA must ensure that all required actions and determinations, discussed in Part I of this chapter have been completed.

These actions include ensuring that the unit is eligible; the unit has been inspected by the AHA and meets the Housing Quality Standards (HQS); the lease offered by the owner is approvable and includes the required Tenancy Addendum; the rent to be charged by the owner for the unit must be reasonable; where the family is initially leasing a unit and the gross rent of the unit exceeds the applicable payment standard for the family, the share of rent to be paid by the family does not exceed 40 percent of the family's monthly adjusted income [24 CFR 982.305(a)]; the owner is an eligible owner, not disapproved by the AHA, with no conflicts of interest [24 CFR 982.306]; the family and the owner have executed the lease, including the Tenancy Addendum, and the lead-based paint disclosure information [24 CFR 982.305(b)] has been provided.

The AHA will complete its determination within 154 calendar days of receiving all required information.

If the terms of the RFTA/proposed lease are changed for any reason, including but not limited to negotiation with the AHA, the AHA will obtain corrected copies of the RFTA and proposed lease, signed by the family and the owner.

Corrections to the RFTA/proposed lease will be accepted as hard copies, by e-mail, in-person, by mail, by fax, or by phone.

## CHAPTER 10

### MOVING WITH CONTINUED ASSISTANCE AND PORTABILITY

#### INTRODUCTION

Freedom of choice is a hallmark of the housing choice voucher (HCV) program. In general, therefore, HUD regulations impose few restrictions on where families may live or move with HCV assistance. This chapter sets forth HUD regulations and AHA policies governing moves within or outside the AHA's jurisdiction in two parts:

Part I: Moving with Continued Assistance. This part covers the general rules that apply to all moves by a family assisted under the AHA's HCV program, whether the family moves to another unit within the AHA's jurisdiction or to a unit outside the AHA's jurisdiction under portability.

Part II: Portability. This part covers the special rules that apply to moves by a family under portability, whether the family moves out of or into the AHA's jurisdiction. This part also covers the special responsibilities that the AHA has under portability regulations and procedures.

#### PART I. MOVING WITH CONTINUED ASSISTANCE

##### 10-I.A. ALLOWABLE MOVES

HUD lists five regulatory conditions and a statutory condition under VAWA in which an assisted family is allowed to move to a new unit with continued assistance. Permission to move is subject to the restrictions set forth in section 10-I.B.

- The family has a right to terminate the lease on notice to the owner (for the owner's breach or otherwise) and has given a notice of termination to the owner in accordance with the lease [24 CFR 982.314(b)(3)] with tenant-based assistance and with project-based assistance, any time after the first year of occupancy. If the family terminates the lease on notice to the owner, the family must give the AHA a copy of the notice at the same time [24 CFR 982.314(d)(1)].

If the family in a project-based voucher unit wishes to move with continued tenant-based assistance, the family must contact the AHA to request the rental assistance prior to providing notice to terminate the lease. If the family terminates the lease in accordance with these requirements and the AHA has the available resources, the AHA will offer the family the opportunity for continued tenant-based assistance, in the form of a Housing Choice Voucher.

If a voucher is not immediately available upon termination of the family's lease in the PBV unit, the AHA will give the family priority to receive the next available voucher. If the family terminates the assisted lease before the end of the first year, the family relinquishes the Housing Choice Voucher assistance. [24 CFR 983.260]

- The Violence Against Woman Reauthorization Act of 2022 provides that "a family may receive a voucher from a public housing agency and move to another jurisdiction under the tenant-based assistance program if the family has complied

with all other obligations of the Section 8 program and has moved out of the assisted dwelling unit in order to protect the health or safety of an individual who is or has been a victim of domestic violence, dating violence, or stalking and who reasonably believed he or she was imminently threatened by harm from further violence if he or she remained in the assisted dwelling unit.” [Pub.L. 113-4]

- The lease for the family’s unit has been terminated by mutual agreement of the owner and the family [24 CFR 982.314(b)(1)(ii)]. If the family and the owner mutually agree to terminate the lease for the family’s unit, the family will give the AHA a copy of the termination agreement. The initial lease term must be for at least one year for a project-based unit and may not be terminated without good cause. In the PBV program, terminating tenancy for “good cause” does not include doing so for a business or economic reason, or a desire to use the unit for personal or family use or other non-residential purpose.
- The owner has given the family a notice to vacate, has commenced an action to evict the family, or has obtained a court judgment or other process allowing the owner to evict the family [24 CFR 982.314(b)(2)]. The family must give the AHA a copy of any owner eviction notice [24 CFR 982.551(g)].
- The AHA has terminated the assisted lease for the family’s unit for the owner’s breach [24 CFR 982.314(b)(1)(i)].
- The AHA determines that the family’s current unit does not meet the HQS space standards because of an increase in family size or a change in family composition. In such cases, the AHA will issue the family a new voucher, and the family and AHA will try to find an acceptable unit as soon as possible. If an acceptable unit is available for the family, the AHA will terminate the HAP contract for the tenant-based voucher family’s old unit in accordance with the HAP contract terms and will notify both the family and the owner of the termination. The tenant-based voucher HAP contract terminates at the end of the calendar month that follows the calendar month in which the AHA gives notice to the owner. [24 CFR 982.403(a) and (c)]

~~Refer to Chapter 16 for households living in a PBV unit where the unit does not meet the HQS space standards because of an increase in family size or a change in family composition. If the family lives in a PBV unit, the family and the owner will be notified within 14 calendar days that the family will be offered continued assistance in another unit. This assistance may be in one of the following forms:~~

- ~~▪—Another project-based voucher unit or~~
- ~~▪—A tenant-based voucher.~~

~~If the AHA offers the family the opportunity to receive a tenant-based voucher, the AHA will terminate HAP for the wrong-sized PBV unit at expiration of the term of the family’s HCV voucher including any extension granted by the AHA. If the AHA offers the family the opportunity for another PBV unit and the family does not accept the offer or does not move out of the wrong-sized PBV unit within 30 calendar days from the date of the offer to accept the other unit, the AHA will terminate HAP for the wrong-sized or accessible unit, at the expiration of the 30-day time period.~~

## **10-I.B. RESTRICTIONS ON MOVES**

A family's right to move is generally contingent upon the family's compliance with program requirements [24 CFR 982.1(b)(2)]. HUD specifies two conditions under which a PHA may deny a family permission to move and two ways in which a PHA may restrict moves by a family.

### **Denial of Moves**

HUD regulations permit the AHA to deny a family permission to move under the following conditions:

#### ***Insufficient Funding***

The AHA may deny a family permission to move if the AHA does not have sufficient funding for continued assistance [24 CFR 982.314(e)(1)].

The AHA will deny a family permission to move on grounds that the AHA does not have sufficient funding for continued assistance if (a) the move is initiated by the family, not the owner or the AHA; (b) the AHA can demonstrate that the move will, in fact, result in higher subsidy costs; and (c) the AHA can demonstrate, through a detailed cost-reduction plan based on reasonable assumptions, that it does not have sufficient funding in its annual budget to accommodate the higher subsidy costs. This policy applies to moves within the AHA's jurisdiction as well as to moves outside it under portability.

#### ***Grounds for Denial or Termination of Assistance***

The AHA has grounds for denying or terminating the family's assistance [24 CFR 982.314(e)(2)]. VAWA creates an exception to these restrictions for families who are otherwise in compliance with program obligations but have moved to protect the health or safety of an individual who is or has been a victim of domestic violence, dating violence or stalking, and who reasonably believed he or she was imminently threatened by harm from further violence if he or she remained in the unit. [Pub.L. 113-4]

If the AHA has grounds for denying or terminating a family's assistance, the AHA will act on those grounds in accordance with the regulations and policies set forth in Chapters 3 and 12, respectively. In general, it will not deny a family permission to move for this reason; however, it retains the discretion to do so under special circumstances. Refer to section 3-III.G and 12-II.E for VAWA provisions.

Moves through portability can be denied if the family is in violation of program regulations or moved out of the unit in violation of the lease [24 CFR 982.353 (b)]. Refer to section 3-III.G and 12-II.E for VAWA provisions.

#### **Restrictions on Elective Moves [24 CFR 982.314(c)]**

HUD regulations permit the AHA to prohibit any elective move by a participant family during the family's initial lease term. They also permit the AHA to prohibit more than one elective move by a participant family during any 12-month period.

The AHA will deny a family permission to make an elective move during the family's initial lease term. This policy applies to moves within the AHA's jurisdiction or outside it under portability.

The AHA will consider exceptions to these policies for the following reasons: to protect the health or safety of a family member (e.g., lead-based paint hazards, domestic violence, witness protection programs), to accommodate a change in family circumstances (e.g., new employment, school attendance in a distant area), or to address an emergency situation over which a family has no control.

In addition, the AHA will allow exceptions to these policies for purposes of reasonable accommodation of a family member who is a person with disabilities (see Chapter 2).

## **10-I.C. MOVING PROCESS**

### **Notification**

If a family wishes to move to a new unit, the family must notify the AHA and the owner before moving out of the old unit or terminating the lease on notice to the owner [24 CFR 982.314(d)(2)]. If the family wishes to move to a unit outside the AHA's jurisdiction under portability, the notice to the AHA must specify the area where the family wishes to move [24 CFR 982.314(d)(2), Notice PIH 2016-9]. The notices must be in writing [24 CFR 982.5]. Notification to the AHA can be made before notification to the owner; however, the AHA will not complete the moving process until notice is given to the landlord. Duplicative assistance on two units will not be paid.

### **Approval**

Upon receipt of a family's notification that it wishes to move, the AHA will determine whether the move is approvable in accordance with the regulations and policies set forth in sections 10-I.A and 10-I.B. The AHA will notify the family in writing of its determination within **714** calendar days following receipt of the family's notification.

### **Reexamination of Family Income and Composition**

When a family wishes to move to another dwelling unit, no reexamination will be scheduled. The family's anniversary date will not change.

For families moving into or families approved to move out of the AHA's jurisdiction under portability, the AHA will follow the policies set forth in Part II of this chapter.

### **Voucher Issuance and Briefing**

For families approved to move to a new unit within the AHA's jurisdiction, the AHA will issue a new voucher within **714** calendar days of the AHA's approval to move. No briefing is required for these families. The AHA will follow the policies set forth in Chapter 5 on voucher term, extension, and expiration. If a family does not locate a new unit within the term of the voucher and any extensions, the family may remain in its current unit with continued voucher assistance if the owner agrees and the AHA approves. Otherwise, the family will lose its assistance.

For families moving into or families approved to move out of the AHA's jurisdiction under portability, the AHA will follow the policies set forth in Part II of this chapter.

### **Housing Assistance Payments [24 CFR 982.311(d)]**

When a family moves out of an assisted unit, the AHA may not make any housing assistance payment to the owner for any month **after** the month the family moves out.



## CHAPTER 16

### PROJECT-BASED VOUCHERS

#### INTRODUCTION

This chapter describes HUD regulations and PHA policies related to the project-based voucher (PBV) program in nine parts:

Part I: General Requirements. General provisions of the PBV program including maximum budget authority requirements, relocation requirements, and equal opportunity requirements.

Part II: PBV Owner Proposals. Policies related to the submission and selection of owner proposals for PBV assistance. This part describes the factors the PHA will consider when selecting proposals, the type of housing that is eligible to receive PBV assistance, the cap on assistance at projects receiving PBV assistance, subsidy layering requirements, site selection standards, and environmental review requirements.

Part III: Dwelling Units. Requirements related to Housing Quality Standards, the type and frequency of inspections, and housing accessibility for persons with disabilities.

Part IV: Rehabilitated and Newly Constructed Units. Requirements and policies related to the development and completion of rehabilitated and newly constructed housing units that will be receiving PBV assistance.

Part V: Housing Assistance Payments Contract. HAP contract requirements and policies including the execution, term, and termination of the HAP contract. In addition, this part describes how the HAP contract may be amended and identifies provisions that may be added to the HAP contract at the PHA's discretion.

Part VI: Selection of PBV Program Participants. Requirements and policies governing how the PHA and the owner will select a family to receive PBV assistance.

Part VII: Occupancy. Occupancy requirements related to the lease, and describes under what conditions families are allowed or required to move.

Part VIII: Determining Rent to Owner. Determining the initial rent to owner, and how rent will be redetermined throughout the life of the HAP contract. Rent reasonableness requirements are also discussed.

Part IX: Payments to Owner. Types of payments owners may receive under this program.

## **PART I: GENERAL REQUIREMENTS**

### **16-I.A. OVERVIEW [24 CFR 983.5]**

The project-based voucher (PBV) program allows the AHA, which already administers a tenant-based voucher program under an annual contributions contract (ACC) with HUD, to operate a PBV program using up to 50 percent of its voucher unit allocation under an approved MTW activity and attach the funding to specific projects rather than using it for tenant-based assistance [24 CFR 983.6]. As defined in 24 CFR 983.3(b), a project can be a single building, multiple contiguous buildings, or multiple buildings on contiguous parcels of land. “Contiguous” in this definition includes “adjacent to,” as well as touching along a boundary or a point. The AHA will only operate a PBV program, at its discretion up to 50 percent of its voucher unit allocation if the AHA has the funding for these units, consistent with its Annual Plan, and the goal of deconcentrating poverty and expanding housing and economic opportunities [42 U.S.C. 1437f(o)(13)]. Under an approved MTW activity, at its discretion the AHA can have up to 100% PBV units at a project.

PBV assistance may be attached to existing housing or newly constructed or rehabilitated housing [24 CFR 983.52].

The AHA is responsible for determining the amount of budget authority that is available for project-based vouchers and ensuring that the amount of assistance that is attached to units is within the amounts available under the ACC [24 CFR 983.6].

The AHA must notify HUD of its intent to project-base its vouchers and when the PHA executes, amends, or extends a HAP contract.

In situations where the language in the PBV HAP contract conflicts with an approved MTW activity, the approved MTW waiver supersedes the obligation to follow the conflicting provisions in the PBV HAP contract.

### **16-I.B. TENANT-BASED VS. PROJECT-BASED VOUCHER ASSISTANCE [24 CFR 983.2]**

Except as otherwise noted in this chapter, or unless specifically prohibited by PBV program regulations, the AHA policies for the tenant-based voucher program contained in this administrative plan also apply to the PBV program and its participants.

### **16-I.C. RELOCATION REQUIREMENTS [24 CFR 983.7]**

Any persons displaced as a result of implementation of the PBV program will be provided relocation assistance in accordance with the requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA)[42 U.S.C. 4201-4655] and implementing regulations at 49 CFR part 24.

The cost of required relocation assistance may be paid with funds provided by the owner, local public funds, or funds available from other sources. The AHA will not use voucher program funds to cover relocation costs.

The acquisition of real property for a PBV project is subject to the URA and 49 CFR part 24, subpart B. It is the responsibility of the AHA to ensure the owner and any

If the reported deficiency is non-life-threatening, the AHA will, within 15 days, both inspect the unit and notify the owner if the deficiency is confirmed. The owner must then make the repairs within 30 days of the notification from the AHA or within any AHA-approved extension.

In the event of extraordinary circumstances, such as if a unit is within a presidentially declared disaster area, HUD may approve an exception of the 24-hour or the 15-day inspection requirement until such time as an inspection is feasible.

The AHA will inspect contract units whenever needed to determine that the contract units comply with HQS and that the owner is providing maintenance, utilities, and other services in accordance with the HAP contract. The AHA will take into account complaints and any other information coming to its attention in scheduling inspections.

The AHA will conduct follow-up inspections needed to determine if the owner (or, if applicable, the family) has corrected an HQS violation, and will conduct inspections to determine the basis for exercise of contractual and other remedies for owner or family violation of HQS.

In conducting AHA supervisory quality control HQS inspections, the AHA will include a representative sample of both tenant-based and project-based units.

#### **Inspecting AHA-owned Units [24 CFR 983.103(g)]**

In the case of AHA-owned units, the inspections will be performed by an independent agency designated by the AHA and approved by HUD. The independent entity will furnish a copy of each inspection report to the AHA and to the HUD San Francisco field office. The AHA will take all necessary actions in response to inspection reports from the independent agency, including exercise of contractual remedies for violation of the HAP contract by the AHA-owner.

### **PART IV: REHABILITATED AND NEWLY CONSTRUCTED UNITS**

#### **16-IV.A. OVERVIEW [24 CFR 983.151 AND 24 CFR 983.152]**

An owner may undertake development activity, as defined at 24 CFR 983.3, for the purpose of:

- Placing a newly constructed or rehabilitated project under a HAP contract; or
- For a rehabilitated project that will undergo development activity after HAP contract execution, completing the requirements of the rider in accordance with 24 CFR 983.157.

There are specific requirements that apply to PBV assistance for newly constructed, rehabilitated housing, or existing housing. This part describes the requirements unique to this type of assistance.

#### **16-IV.B. DEVELOPMENT REQUIREMENTS [24 CFR 983.153]**

##### **Environmental Review Requirements**

The development activity must comply with any applicable environmental review requirements at 24 CFR 983.56.



## **Subsidy Layering Review Requirements**

Existing housing is exempt from subsidy layering requirements.

The AHA can only provide PBV assistance in accordance with the HUD subsidy layering regulations (24 CFR 4.13) and other requirements.

A subsidy layering review is required when an owner undertakes development activity and housing assistance payment subsidy under the PBV program is combined with other governmental housing assistance from Federal, State, or local agencies, including assistance such as tax concessions or tax credits. The subsidy layering review is intended to prevent excessive public assistance for the housing by combining (layering) housing assistance payment subsidy under the PBV program with other governmental housing assistance from Federal, State, or local agencies, including assistance such as tax concessions or tax credits.

If a subsidy layering review is required, the AHA can only execute an Agreement or HAP contract with an owner after HUD or a housing credit agency approved by HUD has conducted any required subsidy layering review and determined that the PBV assistance is in accordance with HUD subsidy layering requirements.

A further subsidy layering review is not required if HUD's designee has conducted a review in accordance with HUD's PBV subsidy layering review guidelines and that review included a review of PBV assistance.

The owner must disclose to the AHA any change to the information provided for purposes of the subsidy layering review, including the amount of assistance or number of units to be developed, that occurs after the subsidy layering review has been conducted and before all contract units are placed under the HAP contract, in accordance with HUD requirements. A subsidy layering review may be required to determine if such a change would result in excess public assistance to the project, as required by HUD through notification in the Federal Register.

The HAP contract must contain the owner's certification that the project has not received and will not receive (before or during the term of the HAP contract) any public assistance for acquisition, development, or operation of the housing other than assistance disclosed in the subsidy layering review in accordance with HUD requirements, unless the owner discloses additional assistance in accordance with HUD requirements. A subsidy layering review is required for newly constructed or rehabilitated housing under a HAP contract that receives additional assistance, as described in 24 CFR 983.11(d).

## **Labor Standards Requirements**

In the case of development involving nine or more contract units (whether or not completed in stages), the owner and the owner's contractors and subcontractors must pay Davis-Bacon wages to laborers and mechanics employed in development of the housing and must comply with the Contract Work Hours and Safety Standards Act, Department of Labor regulations in 29 CFR part 5, and other applicable Federal labor relations laws and regulations. The AHA will monitor compliance with labor standards.

For any project to which labor standards apply, the AHA's written notice to the party that submitted the selected proposal or board resolution approving project-basing of

assistance at the specific project, as applicable per 24 CFR 983.51(f), must state that any construction contracts must incorporate a Davis-Bacon contract clause and the current applicable prevailing wage determination.

### **Equal Employment Opportunity**

Development activity is subject to the Federal equal employment opportunity requirements of Executive Orders 11246, 12432, and 12138.

### **Accessibility Requirements**

The following accessibility requirements apply to development activity:

- The design and construction requirements of the Fair Housing Act and implementing regulations at 24 CFR 100.205;
- The accessibility requirements of Section 504 of the Rehabilitation Act of 1973 and regulations at 24 CFR part 8; AND
- Title II of the Americans with Disabilities Act and regulations at 28 CFR part 35;

A description of any required work item resulting from these requirements must be included in the Agreement or HAP contract (if applicable).

### **Broadband Infrastructure Requirements**

Any development activity that constitutes substantial rehabilitation as defined by 24 CFR 5.100 of a building with more than four rental units and where the proposal or project selection date or the start of the development activity while under a HAP contract is after January 19, 2017, must include installation of broadband infrastructure, as this term is defined in 24 CFR 5.100, except where the owner determines and documents the determination that:

- The location of the new construction or substantial rehabilitation makes installation of broadband infrastructure infeasible;
- The cost of installing broadband infrastructure would result in a fundamental alteration in the nature of its program or activity or in an undue financial burden; or
- The structure of the housing to be substantially rehabilitated makes installation of broadband infrastructure infeasible.

A description of any required work item resulting from these requirements must be included in the Agreement or HAP contract (if applicable).

### **Eligibility to Participate in Federal Programs and Activities Requirement**

An owner or project principal who is on the U.S. General Services Administration list of parties excluded from Federal procurement and non-procurement programs, or who is debarred, suspended subject to a limited denial of participation, or otherwise excluded under 2 CFR part 2424, may not participate in development activity or the rehabilitation of units subject to a HAP contract. Both the Agreement (if applicable) and the HAP contract must include a certification by the owner that the owner and other project principals (including the officers and principal members, shareholders, investors, and other parties having a substantial interest in the project) are not on such list and are not debarred, suspended subject to a limited denial of participation, or otherwise excluded under 2 CFR part 2424.

An owner must disclose any possible conflict of interest that would be a violation of the Agreement (if applicable), the HAP contract, or HUD regulations, in accordance with § 982.161 of this title.

#### **16-IV.C. DEVELOPMENT AGREEMENT [24 CFR 983.154]**

In order to offer PBV assistance in rehabilitated or newly constructed units, the AHA will enter into an agreement to enter into an HAP contract (Agreement or AHAP) with the owner of the property. The Agreement will be in the form required by HUD [24 CFR 983.154].

In the AHAP, the owner agrees to develop the PBV contract units to comply with HQS, and the AHA agrees that, upon timely completion of such development in accordance with the terms of the Agreement, the AHA will enter into an initial HAP contract with the owner for the contract units [24 CFR 983.156(b)]. The Agreement must cover a single project, except one Agreement may cover multiple projects that each consist of a single-family building.

##### **Timing of the Agreement**

The effective date of the Agreement must be on or after the date the Agreement is executed. The Agreement must be executed and effective prior to the commencement of development activity as described below.

##### **Commencement of Development Activity**

Development activity must not commence after the date of proposal submission (for housing subject to competitive selection) or the date of the AHA's board resolution approving the project-basing of assistance at the project (for housing excepted from competitive selection) and before the effective date of the Agreement.

In the case of new construction, development activity begins with excavation or site preparation (including clearing of the land).

In the case of rehabilitation, development activity begins with the physical commencement of rehabilitation activity on the housing.

##### **Content of the Agreement [24 CFR 983.154(e)]**

At a minimum, the AHAP will describe the following features of the housing to be developed and assisted under the PBV program:

- Site and the location of the contract units;
- Number of contract units by area (square footage) and number of bedrooms and bathrooms;
- Services, maintenance, or equipment to be supplied by the owner without charges in addition to the rent;
- Utilities available to the contract units, including a specification of utility services to be paid by the owner (without charges in addition to rent) and utility services to be paid by the tenant;

- A description of any required work item necessary to comply with the accessibility requirements of 983.153(e);
- A description of work to install broadband infrastructure;
- Estimated initial rents to owner for the contract units;
- Description of the work to be performed under the Agreement. For rehabilitated units, the description will include the rehabilitation work write up and, where determined necessary by the AHA, specifications and plans. For new construction units, the description will include the working drawings and specifications;
- Deadline for completion of the work to be performed under the Agreement; and
- Any additional requirements for quality, architecture, or design over and above HQS.

#### **16-IV.D. COMPLETION OF HOUSING**

The AHAP will specify the deadlines for completion of the housing, and the owner must develop and complete the housing in accordance with these deadlines. The AHAP will also specify the deadline for submission by the owner of the required evidence of completion.

##### **Evidence of Completion [24 CFR 983.155]**

At a minimum, the owner must submit the following evidence of completion to the AHA in the form and manner required by the AHA:

- Owner certification that the work has been completed in accordance with HQS and all requirements of the AHAP;
- Owner certification that the owner has complied with labor standards and equal opportunity requirements in development of the housing; and
- Certificate of Occupancy (for new construction) or Final Building Permit cards (for rehabilitation projects) from the City of Alameda.
- The AHA must review the owner's completion evidence and determine whether development activity or substantial improvement was completed. In the case of an AHA-owned unit, the AHA must submit completion evidence to the independent entity and the independent entity must review the completion evidence and determine whether development activity or substantial improvement was completed.

##### **AHA Acceptance of Completed Units [24 CFR 983.156]**

Upon notice from the owner that the housing is completed, the AHA will inspect the housing to determine if it has been completed in accordance with the AHAP, including compliance with HQS and any additional requirements imposed under the AHAP. The AHA also will determine if the owner has submitted all required evidence of completion.

If the work has not been completed in accordance with the AHAP, the AHA will not enter into the HAP contract.

If the AHA determines the work has been completed in accordance with the AHAP and that the owner has submitted all required evidence of completion, the AHA will:

- For units developed pursuant to 983.152(a)(1) which will not undergo development activity after HAP contract execution per 983.157, submit the HAP contract for execution by the owner and execute the HAP contract;
- For rehabilitated housing projects for which development activity has commenced prior to HAP contract execution, but which will undergo development activity after HAP contract execution under 983.157(b), submit the HAP contract for execution by the owner and execute the HAP contract;
- For development activity conducted after HAP contract execution, amend the HAP contract rider to designate the completed units as available for occupancy (983.157(f)(1)(ii)) or, if the owner has completed all development activity as provided in the rider, amend the HAP contract to terminate the rider (983.157(d)); or
- For units that underwent substantial improvement in order to be added to the HAP contract, amend the HAP contract to add the units to the HAP contract (983.207(d)).

## **PART V: HOUSING ASSISTANCE PAYMENTS CONTRACT (HAP)**

### **16-V.A. OVERVIEW**

The AHA will enter into a HAP contract with an owner for units that are receiving PBV assistance. The purpose of the HAP contract is to provide housing assistance payments for eligible families. Housing assistance is paid for contract units leased and occupied by eligible families during the HAP contract term. The HAP contract will be in the form required by HUD [24 CFR 983.202].

### **16-V.B. HAP CONTRACT REQUIREMENTS**

#### **Contract Information [24 CFR 983.203]**

The HAP contract will specify the following information:

- The total number of contract units by number of bedrooms;
- The project's name, street address, city or county, state and zip code, block and lot number (if known), and any other information necessary to clearly identify the site and the building;
- The number of contract units in each building, the location of each contract unit, the area of each contract unit, and the number of bedrooms and bathrooms in each contract unit;
- Services, maintenance, and equipment to be supplied by the owner and included in the rent to owner;
- Utilities available to the contract units, including a specification of utility services to be paid by the owner (included in rent) and utility services to be paid by the tenant;

### **Income Targeting [24 CFR 983.251(c)(6)]**

At least 75 percent of the families admitted to the AHA's tenant-based and project-based voucher programs during the AHA fiscal year from the waiting list will be extremely-low income families. The income targeting requirement applies to the total of admissions to both programs.

### **Units with Accessibility Features [24 CFR 983.251(c)(7)]**

When selecting families to occupy PBV units that have special accessibility features for persons with disabilities, the AHA must first refer families who require such features to the owner.

### **Preferences [24 CFR 983.251(d)]**

The AHA will use the same definitions and requirements for selection preferences that are used for the tenant-based voucher program. The AHA provides an absolute selection preference for eligible in-place families as described in Section 16-VI.B. The preferences for the PBV program may differ slightly from the HCV program. See Chapter 4-III.C.

When vacancies exist in PBV units of a specific size (i.e., number of bedrooms) or in excepted units, the AHA will select only qualified families of the correct family composition size according to the AHA's subsidy standards for those units in the correct order from the waiting list.

Preference points are aggregated to produce the total preference points for each applicant. Applicants with the same total preference points will then be sorted by the method in which they were selected to be placed on the waiting list (i.e., date and time of application or order of random selection).

At the time of initial application, the applicant certifies as to whether or not it is eligible for a preference, and the AHA will place the applicant on the waiting list according to the preference claimed. Before the family receives assistance, however, the AHA must verify the family's eligibility for the preference based on current circumstances. If upon verification the AHA determines that the family does not qualify for the preference claimed, the family does not receive the preference. In this situation, the AHA will notify the applicant in writing that they do not qualify for the preference and will be returned to the waiting list with an update to the applicant record.

If the AHA has projects with contracts executed prior to MTW designation and with units specifically made available for elderly families or families receiving supportive services, the AHA will give preference to such families when referring families to these units [24 CFR 983.261(b)]. For HAP contracts signed prior to April 18, 2017 this also includes units specifically made available for disabled families.

## **16-VI.E. OFFER OF PBV ASSISTANCE**

### **Refusal of Offer [24 CFR 983.251(e)(3)]**

The AHA is prohibited from taking, and will not take, any of the following actions against a family who has applied for, received, or refused an offer of PBV assistance:



- Refuse to list the applicant on the waiting list for tenant-based voucher assistance;
- Deny any admission preference for which the applicant qualifies;
- Change the applicant's place on the waiting list based on preference, date, and time of application, or other factors affecting selection under the AHA's selection policy;
- Remove the applicant from the tenant-based voucher waiting list.

### **Disapproval by Landlord [24 CFR 983.251(e)(2)]**

If the family refuses the PBV unit offer without good cause or~~If~~ a PBV owner rejects a family for admission to the owner's units, such rejection may not affect the family's position on the tenant-based voucher waiting list or any other project-specific project-based waiting list.

Good cause in this instance is defined as:

1. A unit with HQS deficiencies;
2. A unit that is inaccessible or otherwise does not meet the disability-related needs of a household member with a disability;
3. Circumstances beyond the family's control; or
4. Health or safety risk dues to being a victim of domestic violence, dating violence, sexual assault, or stalking.

A family may refuse a PBV unit for good cause and will not lose their place on the waiting list.

### **Determination of Eligibility and Offer of Unit**

Once an offer for PBV assistance is made, families will have 14 days to decide if they would like to accept the unit offer and will have 30 days to move into the unit or upon completion of the family briefing, whichever is later.

### **Acceptance of Offer [24 CFR 983.252]**

#### **Family Briefing**

When a family accepts an offer for PBV assistance, the AHA will give the family an oral briefing. The briefing will include information on how the program works, the responsibilities of the family and owner, and the family's right to move. In addition to the oral briefing, the AHA will provide a briefing packet that explains how the AHA determines the total tenant payment for a family, the family obligations under the program, family's right to move, PHA subsidy standards, including when the PHA will consider granting exceptions to the standards as allowed by 24 CFR 982.402(b)(8), and when exceptions are required as a reasonable accommodation for a person with disabilities under Section 504, the Fair Housing Act, or the Americans with Disabilities Act and information on Federal, State, and local equal opportunity laws, the contact information for the Section 504 coordinator, a copy of the housing discrimination complaint form, and information on how to request a reasonable accommodation or modification under Section 504, the Fair Housing Act, and the Americans with Disabilities Act.

In addition, the AHA and family must sign the statement of family responsibility.

#### **Persons with Disabilities**

## 19-I.B. OVERVIEW OF STABILITY VOUCHERS (SV)

The Consolidated Appropriations Act, 2021 (Public Law 116-260) authorized a new allocation of Stability Vouchers. In June 2023, the AHA received an allocation of ten (10) Stability Vouchers as outlined in PIH Notice 2022-24. Stability Vouchers are similar to EHV, but have some slight differences such as Stability Vouchers do not have a deadline after which turnover vouchers may not be issued.

As with EHV, all other sections of this Plan apply to Stability Vouchers unless explicitly stated otherwise in this chapter or HUD regulation or guidance.

Please refer to the table in Chapter 1 for a list of which MTW flexibilities have been extended to SV.

## 19-I.C. FUNDING AND USES OF FUNDING

Funding and its approved uses are spelled out in PIH Notice 2021-15 for EHV. The funding for Stability Vouchers differs from EHV in several ways and was outlined in the award letter from HUD.

### ADMINISTRATIVE FEES

Administrative fees received for EHV can only be used for EHV and must be recorded separately for the Administrative Fees of other AHA programs.

- **On-going monthly administrative fee:** received to administer the program calculated the same as under the Housing Choice Voucher program
- **Preliminary Fee:** single, one-time payment
- **Placement Fee/Expedited Issuance Reporting Fee:** one-time fee received for initial lease-up of each EHV. Amount depends on time to lease.
- **Service Fee:** one-time fee for each EHV allocated.

At the recommendation of the Director of Housing Programs and with the Approval of the Executive Director or designee, one-time administrative fees may be used for other eligible expenses (see next section).

The SV program receives one-time Special Fees for each awarded SV and not the above categories for EHV.

### QUALIFIED ACTIVITIES FOR ONE-TIME ADMINISTRATIVE FEES FOR EHV

Each EHV household shall be eligible for up to \$3500 of services; choice and provision of the services will be at the AHA's discretion.

- 1) Housing Search Assistance if unavailable through the CoC
  - a) Identify and visit possible units including ADA accessible
  - b) Transportation and directions
  - c) Rental application assistance
  - d) Expedite leasing process including payment of leasing related fees
  - e) Housing Mobility Services
- 2) Security Deposit if unavailable through the CoC
  - a) Security Deposit Assistance
    - i) Cannot exceed the less of



- (1) Two month's rent
  - (2) Maximum security deposit allowed under law
  - (3) Actual amount required by owner for other unassisted units
  - (4) \$3,000
- ii) The AHA will pay the security deposit directly to the owner
- iii) The owner must refund the security deposit to the AHA at the end of the tenancy less any amounts retained by the owner in accordance with the lease and California State law.
- 3) Owner-related Uses
  - a) Owner recruitment and outreach
  - b) Owner incentive and/or retention payments
    - i) The AHA will make one-time incentive payments of \$2,000 at the lease-up of an EHV family.
    - ii) Funds may be used for owners with accessible units or owners that will make the living conditions accessible (interior/exterior structural modifications) for a person with disabilities.
- 4) Other Eligible Uses
  - a) Tenant-readiness services
    - i) Fees may be paid for customized plans to address or mitigate barriers such as negative credit, lack of credit, negative rental or utility history or to connect the family to other resources.
    - ii) The AHA can provide access to case management, wrap-around services, life skills training, financial stability training, mental health care, and/or a stability coordinator.
    - iii) The AHA can also provide services to remedy a lease violation and/or prevent an eviction.
    - iv) The AHA can also use service fees to help for families to obtain vital documents needed to establish eligibility for the program and/or required by landlords as part of their rental application.
  - b) Moving Expenses
    - i) The AHA will pay some or all of the family's reasonable moving expenses when the family initially leases a unit with the program.
      - (1) The family must submit documentation of moving expenses for payment.
    - ii) The AHA will pay for application fees up to \$500 per family.
    - iii) The AHA will assist with the Security Deposit up to the lesser of the following
      - (1) Actual Security Deposit required by owner
      - (2) Maximum security deposit allowed under state or local law
      - (3)
    - iv) The AHA can also pay for storage expenses and lock change fees.
  - c) Essential Household items
    - i) The AHA may use the services fee funding to assist the family with some or all of the costs of acquiring essential household items. The AHA can provide a prepaid gift card directly to families after the AHA has verified that the family purchased essential household items and the AHA obtains and maintains appropriate supporting documentation.

- ii) Definition of Essential Households Items: furniture, toiletries, tableware, bedding, cleaning supplies, bathroom supplies, kitchen supplies, basic tools, and basic household items such as light bulbs or smoke detectors.

#### QUALIFIED ACTIVITIES FOR ONE-TIME SPECIAL FEES FOR SV

Each SV household shall be eligible for services from SV funding not to exceed ~~SVEHV~~ limit; choice and provision of the services will be at the AHA's discretion. Once SV Special Fees funding are expended, the AHA may fund these activities through non-Federal funds at its discretion.

- 1) Owner incentive
  - a) Owner incentive and/or retention payments
    - i) The AHA will make one-time incentive payments of \$2,000 at the lease-up of an SV family.
- 2) Security Deposit if unavailable through the CoC
  - a) Security Deposit Assistance
    - i) Cannot exceed the less of
      - (1) Two month's rent
      - (2) Maximum security deposit allowed under law
      - (3) Actual amount required by owner for other unassisted units
    - ii) The AHA will pay the security deposit directly to the owner
    - iii) The owner must refund the security deposit to the AHA at the end of the tenancy less any amounts retained by the owner in accordance with the lease and California State law.
- 3) Application Fees
  - a) The AHA will pay for application fees up to \$500 per family.

#### 19-I.D. RESPONSIBILITIES UNDER PROGRAM

Agencies with MOU's with the AHA will refer families according to the terms in the MOU for both the EHV and SV vouchers. The AHA will issue and administer the EHV and SV.

### PART II. ELIGIBILITY AND ADMISSION

#### 19-II.A. ELIGIBILITY

To be eligible for EHV a family must be:

- Homeless;
- At risk of homelessness;
- Fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking; or
- Recently homeless and for whom providing rental assistance will prevent the family's homelessness or having high risk of housing instability.

The definitions for EHV eligibility are found in PIH Notice 2021-15 section 8.a.

To be eligible for SV a family must be:

**EXTREMELY LOW-INCOME FAMILY.** A very low-income family whose annual income does not exceed the higher of the Federal poverty level or 30 percent of the median income for the area, as determined by HUD, with adjustments for smaller and larger families. HUD may establish income ceilings higher or lower than 30% of medical income for an area if HUD finds such variations are necessary due to unusually high or low family incomes.

**FAIR HOUSING ACT.** Title VIII of the Civil Rights Act of 1968, as amended by the Fair Housing Amendments Act of 1988 (42 U.S.C. 3601 et seq.)

**FAIR MARKET RENT (FMR).** The rent, including the cost of utilities (except telephone), as established by HUD for units of varying sizes (by number of bedrooms), that must be paid in the housing market area to rent privately owned, existing, decent, safe and sanitary rental housing of modest (non-luxury) nature with suitable amenities. In the HCV program, the FMR may be established at the ZIP code level (see definition of Small Area Fair Market Rents), metropolitan area level, or nonmetropolitan county level. Fair market rents for existing housing are established by HUD for housing units of varying sizes (number of bedrooms) and are published in the *Federal Register*.

**FAMILY.** "Family" includes, but is not limited to, the following, regardless of actual or perceived sexual orientation, gender identity, or marital status: 1) a single person, who may be: i) an elderly person, displaced person, disabled person, near-elderly person, or any other single person; ii) An otherwise eligible youth between 18 and 24 years of age who has left foster care or who will leave foster care within 18090 days, and is homeless or at risk of becoming homeless at age 16 or older; 2) or a group of persons residing together, and such group includes, but is not limited to: i) a family with or without children (including a child who is temporarily away from the home because of placement in foster care); ii) an elderly family; iii) a near-elderly family; iv) a disabled family; v) a displaced family; and vi) the remaining member of a tenant family.

**FAMILY OF VETERAN OR SERVICE PERSON.** A family is a "family of veteran or service person" when:

- The veteran or service person (a) is either the head of household or is related to the head of the household; or (b) is deceased and was related to the head of the household, and was a family member at the time of death.

The veteran or service person, unless deceased, is living with the family or is only temporarily absent unless s/he was (a) formerly the head of the household and is permanently absent because of hospitalization, separation, or desertion, or is divorced; provided, the family contains one or more persons for whose support s/he is legally responsible and the spouse has not remarried; or (b) not the head of the household but is permanently hospitalized; provided, that s/he was a family member at the time of hospitalization and there remain in the family at least two related persons.

**FAMILY RENT TO OWNER.** In the voucher program, the portion of the rent to owner paid by the family.

**FAMILY SELF-SUFFICIENCY PROGRAM (FSS PROGRAM).** The program established by a PHA to promote self-sufficiency of assisted families, including the provision of supportive services.



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Sylvia Martinez, Director of Housing Development

Date: June 18, 2025

Re: Adopt a Resolution to Loan Island City Development, or its affiliate, up to \$500,000 for future funding applications for Estuary II, with the stipulation to seek other local funding; Authorize the Executive Director to Execute Commitments up to \$500,000 for Estuary II.

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### **BACKGROUND**

Estuary II is the remaining Block A project that is fully entitled, building permit ready, but yet to receive all its financing. It has applied in the last three years for tax credit and/or bond financing and has come close to an award based on scoring, but has not been awarded the financing. In less than one year, some of the existing commitments will begin to expire. In addition, state and federal sources may be in shorter supply in the future.

The Housing Authority of the City of Alameda's (AHA) current funding commitment to Estuary II is \$3,750,000, matched by the State Local Housing Trust Fund amount of \$1,250,000 for a \$5,000,000 loan through the Alameda Affordable Housing Trust Fund (AAHTF). In addition, the Board approved up to \$1,500,000 in master plan cost funding for the offsite components of the project.

### **DISCUSSION**

The timing of tax credit and other applications is unpredictable, and many times applied-for funds are pending, but not fully committed, at the time of a tax credit or bond financing round. Staff is continually looking for methods to streamline applications and present the most competitive scenario. Where small, but significant amounts of local funding are pending, AHA can choose to make a commitment to back fill these sources, and seek replacement commitments later. In particular, staff has identified the City's current HOME/PLHA commitment of approximately \$170,000, which has a conditional award that will not be committed until the end of August 2025. There are potential other PLHA funds of several hundred thousand dollars that could be committed by AHA now to assist with the July 2025 application season and be back filled with City commitments at a later date.



This action has a precedent with Rosefield Village, where AHA made a multi-million-dollar commitment so that the project could achieve substantial leverage points, and all funds committed by AHA were later replaced with other local sources. A chart of AHA commitments to previous projects is included in the presentation attached.

Staff request that the Board consider a total of up to \$500,000 to backfill local commitments, with the stipulation that staff continue to apply for local funds to assist AHA with this addition to its already considerable investment at North Housing. Staff will continue to keep the Board informed of the status of the use of this additional loan commitment, and any potential replacement funds.

### **FISCAL IMPACT**

The fiscal impact of this small additional loan should be temporary, as \$170,000 is expected to be finalized in August, and other applications can be made in 2026 to provide repayment of funds. The loan, if needed during construction, would be under the same terms as other AHA debt, 55 years, residual receipts loan paid from a pro rata share with other lenders.

### **CEQA**

Not known

### **RECOMMENDATION**

Adopt a Resolution to Loan Island City Development, or its affiliate, up to \$500,000 for future funding applications for Estuary II, with stipulation to seek other local funding; Authorize the Executive Director to Execute Commitments up to \$500,000 for Estuary II.

### **ATTACHMENTS**

1. Presentation - Estuary II Loan
2. AHA Resolution Estuary II\_Draft

Respectfully submitted,

A handwritten signature in blue ink, appearing to read 'Sylvia Martinez', with a stylized, cursive script.

Sylvia Martinez, Director of Housing Development

# Approve a \$500,000 loan to ICD for Estuary II

June 2025



Housing Authority  
of the  
City of Alameda



Housing Authority  
of the  
City of Alameda

[www.alamedahsg.org](http://www.alamedahsg.org)

# Estuary II

- Fully entitled
  - Building permit ready
  - Seeking final tax credit or tax credits with bond financing
- 
- Soft loans assist with competitiveness – acting as leverage
  - Timing can be an issue, as the tax credit applications may not have the same timing as soft local funding awards.
  - Local funding can be substituted with other local funds

# AHA funding of recent projects

AHA Per Unit Subsidy	Recent Projects			
	Lease/sale of Land/ buildings	Loan	Loan per unit	Notes
Everett Commons	\$ 2,200,000	\$ 4,471,334	\$ 223,567	
Littlejohn Commons	\$ 3,410,000	\$ 3,762,147	\$ 125,405	
Rosefield Village	\$ 13,110,000	\$ -	\$ -	*Original commitment of \$6,660,000 replaced with other local funds
Estuary I	\$ 2,061,601	\$ 6,750,000	\$ 150,000	
Linnet Corner	\$ 3,708,968	\$ 2,438,000	\$ 38,094	
Estuary II - Current	\$ 2,753,674	\$ 3,750,000	\$ 81,522	At present, includes master plan costs
Estuary II - Proposed	\$ 2,753,674	\$ 4,250,000	\$ 92,391	Proposed; \$500,000 conditional on applications to other local funders
			\$ 101,568	Average



Approve a Resolution to loan to Island City Development for Estuary II for up to \$500,000 for future funding applications, with stipulation to seek other local funding; Authorize the Executive Director to Execute Commitments up to \$500,000 for Estuary II.

# Questions or comments?



Housing Authority  
of the  
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HOUSING AUTHORITY OF THE CITY OF ALAMEDA

*Resolution No. XXX*

**Loan - Estuary II (North Housing PSH II)**

**WHEREAS**, the Housing Authority of the City of Alameda (the “**Housing Authority**”) is the owner of that certain land located at 520 Mosely Avenue in the City of Alameda (the “**Land**”), which is commonly referred to as Estuary II (North Housing PSH II), and has provided an option to ground lease this property to Island City Development, or one of its affiliates.

**WHEREAS**, Island City Development, a California nonprofit public benefit corporation (“**ICD**”) ICD has formed and is the sole member and manager of ICD Mosely LLC, a California limited liability company (the “**LLC**”), and the LLC has formed and is the sole general partner of Mosely and Mabuhay LP, a California limited partnership (the “**Partnership**”), with the Housing Authority as the initial sole limited partner of the Partnership.

**WHEREAS**, the Board deems it to be in the best interests of the Housing Authority, as lessor, to provide a loan of up to \$500,000 upon such terms and conditions as deemed necessary or appropriate by an officer of the Housing Authority (the “**Ground Lease**”).

**WHEREAS**, the Partnership intends to acquire, rehabilitate, construct, own and operate 46 units of affordable housing on the Land (the Partnership’s leasehold interest in the Land and fee interest in the improvements, including the affordable housing, now or hereafter located thereon is collectively referred to herein as the “**Project**”).

**WHEREAS**, the Board of Commissioners (the “**Board**”) of the Housing Authority deems it to be in the best interests of the Housing Authority to assist in the acquisition, rehabilitation, construction and development of the Project by the Partnership by providing a loan of up to \$500,000 for eligible development costs. The terms of the loan shall be at a minimum 55 years, payable from a share of residual receipts with other public lenders, and secured by a deed of trust, and any other such terms as may be required by other lenders and approved by Housing Authority counsel.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board hereby approves and authorizes the Executive Director, or her designee to provide award or funding commitment letters for a loan up to \$500,000 to Island City Development or its affiliate on behalf of the Project.

**BE IT FURTHER RESOLVED**, that the Board hereby authorizes the Executive Director, or her designee to execute this loan commitment subject to any minor conforming, technical or clarifying changes approved by the Executive Director or her designee and Housing Authority counsel. The Executive Director, or her designee, are hereby further

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authorized and directed to take such further actions as are necessary to satisfy other public funders relying on the loan commitment for competitive application purposes.

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ATTEST:

\_\_\_\_\_  
Vanessa M. Cooper  
Executive Director/Secretary

\_\_\_\_\_  
Carly Grob, Chair  
Board of Commissioners

Adopted:

\_\_\_\_\_  
Date



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

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701 Atlantic Avenue • Alameda, California 94501-2161

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To: Honorable Chair and Members of the Board of Commissioners

From: Vanessa Cooper, Executive Director

Date: June 18, 2025

Re: Establish a Nominating Ad Hoc Committee for the Appointment of the Chair and Vice Chair of the Board of Commissioners for the Period of July 1, 2025 - June 30, 2026.

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### **BACKGROUND**

Section 4 of the Rules and Procedures of the Housing Authority states: "The Chair and Vice Chair shall be elected by the Board of Commissioners from its membership at the first meeting after July 1st of each year when the Commission is fully constituted."

### **DISCUSSION**

The Board is asked to appoint up to three Board members to constitute the ad hoc committee. This committee will report back to the Executive Director with recommendations no later than two weeks before the first meeting after August 1, 2025.

### **FISCAL IMPACT**

N/A

### **CEQA**

N/A

### **RECOMMENDATION**

Establish a Nominating Ad Hoc Committee for the Appointment of the Chair and Vice Chair of the Board of Commissioners for the Period of July 1, 2025 - June 30, 2026.

### **ATTACHMENTS**

None

Respectfully submitted,

*Vanessa Cooper*



Vanessa Cooper, Executive Director