



HOUSINGAUTHORITY

SANTA CLARA COUNTY

making homes, growing communities

DRAFT

FY2023

Moving to Work
Annual Plan

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

Submitted April __, 2022

FY2023 Moving to Work Annual Plan

SANTA CLARA COUNTY HOUSING AUTHORITY (SCCHA)

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

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

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

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Table of Contents

I.	Introduction.....	1
II.	General SCCHA Operating Information	11
III.	Proposed MTW Activities (HUD Approval Requested).....	25
IV.	Approved MTW Activities (HUD Approval Previously Granted).....	31
	Implemented Activities	31
	Activities Not Yet Implemented	54
	Activities On Hold.....	59
	Closed Out Activities	61
V.	MTW Sources And Uses of Funds.....	63
VI.	Administrative	68
	Appendix One: Resolution No. 22-0_.....	69
	Appendix One: Certifications of Compliance	70
	Appendix Two: Certification of Payments (HUD 50071).....	75
	Appendix Three: Disclosure of Lobbying Activities (SF-LLL).....	76

I. Introduction

Letter from the Executive Director

As the Santa Clara County Housing Authority (SCCHA) plans for Fiscal Year 2023, the agency is focused on creating better outcomes for the more than 20,000 low-income individuals and families we serve throughout Silicon Valley. Their viewpoints are at the center of all our decisions. As the careful steward of public funds, we're excited to be working closer than ever with our community partners to leverage our limited housing vouchers and bring more people home, whether that be through partnerships with landlords, innovative rental assistance programs, the development of permanent supportive housing, or other creative entrepreneurial programs.

Since January 2020, Santa Clara County's supportive housing system has connected more than 5,000 people with permanent housing. While we still have a lot more to accomplish, our community's collective efforts are working. Fewer people are falling into homelessness, we have more temporary housing options and together we're leveraging new sources of local, state and federal funding to overcome homelessness.

The MTW program's funding flexibility continues to be critical for SCCHA's mission. For example, our agency's allotment of emergency housing vouchers is at the heart of the new County Continuum of Care campaign to end family homelessness, which was announced October 4, 2021. The HEADING HOME campaign aims to permanently house 1,200 families with children in the next year and 600 families annually thereafter. The goal is to achieve a "functional zero" in five years, meaning the number of housing placements for families exceeds the number of families entering homelessness. Six hundred of the approximately 1,000 emergency housing vouchers SCCHA was awarded through the federal American Rescue Plan Act are being creatively leveraged to provide rental support to families for up to 10 years. These vouchers will come with funding for housing search assistance plus other assistance and incentives to help residents find and secure their new homes.

In a similar community-wide effort, our agency has taken a lead role in partnership with the City of San José and the County by applying for funding from the State of California's Homekey program. If our application is successful, Homekey program funding will be combined with up to \$29 million in MTW funds and 85 project-based vouchers toward the purchase and redevelopment of The Residence Inn hotel in San José, which will provide 100 units for families experiencing homelessness and at risk of becoming homeless. The agency also is taking the lead on a second Homekey application for housing transitional youth.

These are just two examples of how our agency and its partners are serving more extremely vulnerable households than ever before. Moving forward, SCCHA's talented staff has embarked on exciting new initiatives that I am confident will help us create a truly collaborative MTW program and an agency that is even more relevant, more connected and more impactful in the community.

Sincerely,

Preston Prince
Executive Director



Bracher Gardens Apartments

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

SCCHA is undergoing a shift in the Moving to Work Plan process, with an intentional focus on collaboration and inclusivity in planning and a purpose-driven approach to activity development. As such, the MTW Plan for FY2023 will be pared down in terms of activities, with the intention to bring more collaborative and impactful activities to improve the health, income and educational status of our residents in the FY2024 MTW Plan.

Vision and Goals

The FY2020-FY2025 Strategic Plan was approved by the Board of Commissioners and adopted August 1, 2019. Every six months, SCCHA reports to its Board the progress on the action items and objectives developed from the Agency’s Strategic Plan Goals. These updates encourage the agency to re-prioritize or revise the objectives of the Plan as necessary and provide a status report to both internal and external stakeholders on how SCCHA’s initiatives align with the Strategic Plan. SCCHA’s future actions will be carefully examined through the lens of diversity, equity, and inclusion. These principles will be at the forefront of the agency’s thought processes, and will guide the formulation of procedures, policies, and both internal and external engagement.

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

Housing Availability & Affordability

Goal 1. Increase the number of and equitable access to housing opportunities for low-income Santa Clara County residents

SCCHA’s permanently open interest list for Housing Choice Vouchers (HCV), Project Based Vouchers (PBV), and Mod Rehab units launched in December 2020 and the first names were pulled for PBVs in April 2021. Thus far SCCHA has used the interest list to

draw names for PBV vacancies, but expects to start draws for HCVs soon. When vouchers are available, names are drawn by random lottery.

Rather than maintaining one PBV or Mod Rehab waiting list for all projects, applicants have the choice to sign up for the site-based interest list of specific properties. Applicants can view project information, including amenities and accessibility information, empowering them to decide which sites would work best for them and their families.

As vacancy rates remain very low in Santa Clara County, SCCHA continues to monitor the housing success rates for families shopping with Housing Choice Vouchers and support them through housing search assistance if they are unable to find a new home within the first 120 days of their shopping voucher.

Goal 2. Preserve the existing housing opportunities available to low-income Santa Clara County residents to counter displacement of those who are most impacted by Santa Clara County’s income disparity and housing crisis

SCCHA has taken an active role in the State of California’s Homekey Program. The Homekey Program provides funding to local public agencies to purchase hotels and motels for conversion to affordable housing serving persons experiencing homelessness or at risk of homelessness. SCCHA is currently considering two Homekey eligible projects; the Residence Inn (102 units) and the Pavilion Inn (61 units). The Homekey Program covers approximately two-thirds of the acquisition and capital expenses, with local public agencies providing a match. SCCHA is very excited about this opportunity and looks forward to reporting more on its successes in the coming years.

Partnerships

Goal 3. Build strong partnerships that promote better outcomes for those in need of maintaining, affording or securing housing

Santa Clara County has a well-publicized affordable housing crisis. The community’s recognition of the need for more affordable housing was demonstrated by the overwhelming voter approval of \$950 million in Measure A bond funds for affordable housing development, \$700 million of which is directed to extremely low-income households and permanent supportive housing.

Partnering with the development community by attaching PBVs to projects receiving Measure A development funds ensures that units will be affordable for the County’s vulnerable populations, and that new construction properties will have enough long-lasting operating revenue. SCCHA is committed to making available as many additional PBVs in support of Measure A as HUD regulations and funding availability allow. By the end of FY2022, SCCHA will have awarded or conditionally awarded 1,239 Moving-to-

Work PBVs and 236 HUD-VASH PBVs (in conjunction with the Veterans Affairs Palo Alto Health Care System) to Measure A projects. Several Measure A projects, such as Quetzal Gardens Apartments and Leigh Avenue Senior Apartments in San Jose, and Calabazas Apartments in Santa Clara have already completed construction, with the rest expected to complete construction throughout FY2024.

SCCHA’s housing development partners provide hope for the future by actively creating new housing dedicated to alleviating homelessness. New affordable housing projects are currently under construction throughout the County. The properties leasing up in FY2023 have all been awarded funds under Santa Clara County’s Measure A housing referendum. SCCHA’s partnership with the County will provide PBVs at the following projects in FY2023:

- Vela Apartments will house chronically homeless individuals and families through the use of 29 PBVs.
- Page Street will house chronically homeless individuals and families through the use of 27 PBVs.
- 4th Street Apartments will be a 100% permanent supportive housing project with all 93 affordable units supported by PBVs.
- Gallup & Mesa Apartments is a 46-unit project in San Jose. 23 units will be supported with PBVs and set aside for individuals and families with special needs.
- Immanuel Sobrato will provide an additional 106 units with 97 units supported by PBVs for chronically homeless individuals and families.

Operational Excellence

Goal 4. Maximize agency fiscal health, efficiency and effectiveness by streamlining processes, adopting technology and embracing innovation

The COVID-19 pandemic forced SCCHA to re-prioritize quickly beginning in March 2020. The IT Department deployed laptops and associated technology to allow staff to work from home, which was not previously part of SCCHA’s normal operations.

In the last year, new opportunities and considerations have expanded the options for potential office locations, including expanded teleworking, alignment with community development efforts, and ease of access for our clients. Options being analyzed include rebuilding the office at 505 Julian Street, revisiting the new office location at our East Santa Clara site. SCCHA intends to complete this analysis and make a final recommendation to its Board in early 2022.

SCCHA is pursuing strategies within FY2023 and beyond that will set the foundation for the Agency to fulfill its MTW and non-MTW long-term goals.

Department Updates

Asset Management

- Preparing for upgrades at the San Pedro Gardens project in Morgan Hill, California. The 20 units at this family affordable housing project will be rehabilitated over the course of FY2022 and FY2023.

Compliance

- Currently developing the FY2023 budget for SCCHA's Federal Programs Housing Department, which will be approved by the Board in June.
- Consistently monitors voucher lease rates and Housing Assistance Payment utilization to ensure the agency maintains maximum voucher utilization.

Development

Approximately \$42 million in MTW funds were used to purchase land for the developments below. Development and financing efforts are ongoing at all these sites.

- Bellarmino Place Family Housing (115 units)
- Alvarado Park Senior Housing (89 units)
- East Santa Clara site will be the home to the following 4 affordable housing developments.
 - Hawthorn Apartments (107 units)
 - Trillium Apartments (94 units)
 - Sage Apartments (135 units)
 - Elderberry Apartments (135 units)

Information Technology

- Continually updating and troubleshooting technology allowing staff to work from home
- Converting paper processes to digital format
- Improving telecommunications, allowing Housing Program Specialists to communicate better with participants
- Improving Network Infrastructure allowing employees more flexibility in where work happens

Finance

- Developing a comprehensive procedure manual to standardize all finance functions
- Implementing a specialized job cost module for construction and development activities.
- Obtaining the latest technology to improve the effectiveness and efficiency of financial processes

Policy/ Training & Outreach

- The Policy Team is actively involved in preparing for a new MTW Planning process
- The Policy Team is also collecting and analyzing data to identify the Agency's North Star

- The Training & Outreach team continues to onboard new staff members through a hybrid of in-person and virtual trainings

PBV Pipeline

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

This group of projects also includes those awarded PBVs through SCCHA's 2020 RFP, which was directed at 2-and 3-bedroom units to increase much needed affordable housing for low-income families in our County. SCCHA's PBV pipeline will increase (once constructed) the local affordable housing stock by 1,853 units, 454 of those supported by PBVs.

New Proposed Activities for FY2023

SCCHA is in the midst of revamping its MTW program to better focus on priorities which would more effectively serve the community and SCCHA's voucher holders, community partners, and affordable housing residents. Since this revamping process will not be complete before this Plan is completed, SCCHA is only proposing two new activities for FY2023:

❖ **Activity 2023-01: Delay Non-Income Verification After New Admission**

This activity would allow families to self-certify their social security number (SSN), eligible immigration status, and date of birth (DoB) if they are unable to provide verification at the time of initial eligibility determination. During COVID, the Social Security Administration and California Department of Motor Vehicles offices have had closures and reduced staffing, which has delayed applicants who may have lost their personal identification information from providing the HUD-required documents necessary to verify their SSN, DoB, and immigration status. With this waiver, families would be required to provide verification documentation no later than 180 days past admission to the program. Removing the need for providing the necessary documents for verification prior to admission to the program will allow SCCHA to more quickly house applicants who may not have verification of their Social Security number, date of birth and legal immigration status, such as the homeless. Currently families have 15 days to provide necessary verification documentation prior to admission to the program. Families that are unable to provide the verification documentation are withdrawn from the waiting list without a voucher.

(MTW Statutory Objectives: Increase Housing Choices)

❖ **Activity 2023-02: Strive Scholarship**

Each summer since 2015, SCCHA has awarded the Strive Scholarship to Section 8 participants, public housing residents, and residents of SCCHA-owned affordable housing who will be attending a university, community college, or technical institution in the fall. The Strive Scholarship funds were allocated out of MTW funds and authorized by prior activities 2014-1 and 2014-1a, which are broader activities relating to the Focus Forward Program. Activity 2023-02 would separate out the Strive Scholarship as a stand-alone activity. This will allow SCCHA to continue to recognize and reward our clients for furthering their education, in the event that the Focus Forward activities are closed out.

(MTW Statutory Objectives: Increase Economic Self-Sufficiency)

❖ **Re-Proposed Activity 2010-04: Allocating Project-Based Vouchers to SCCHA-Owned Projects Without Competition**

This activity was originally proposed to allow SCCHA to issue Project Based Vouchers (**PBVs**) to projects owned by SCCHA or a SCCHA affiliate entity without needing to go through a competitive selection process. The re-proposal of this activity would leave the original activity in place and broaden SCCHA's discretion to enter into an Agreement to Enter into Housing Assistance Payments (**AHAP**) contract for SCCHA-owned new construction or rehabilitation PBV projects. AHAP contracts are essentially construction contracts, and lenders often require developers to enter AHAPs as collateral for construction loans. Broadening SCCHA's discretion in this respect removes certain regulatory hurdles in the PBV development process (for example, there is a regulation which prevents any work such as site preparation or demolition before the AHAP contract is signed), which can be challenging for both the agency and developers. This re-proposed activity would mirror certain provisions of the Housing Opportunity Through Modernization Act (**HOTMA**) which Congress passed in 2017 but which have yet to be implemented by HUD.

(MTW Statutory Objectives: Increase Housing Choices)

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

Overview of SCCHA’s MTW Activities

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

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

MTW Statutory Objectives				
ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #)	ACTIVITY	REDUCE COST & ACHIEVE GREATER COST EFFECTIVENESS IN FEDERAL EXPENDITURES	PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY	INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES
2011-1	Streamlined Approval Process for Exception Payment Standard for Reasonable Accommodation – HCV			X
2011-2	Simplify Requirements Regarding Third-Party Inspections and Rent Services	X		
2012-2	Minimum Two-year Occupancy in Project-Based Unit	X		
2012-3	Create Affordable Housing Acquisition and Development Fund	X		X
2012-4	Create Affordable Housing Preservation Fund for SCCHA- and Affiliate-Owned Properties	X		X
2012-5**	Expand Tenant Services at SCCHA or Affiliate-Owned Affordable Housing Properties		X	
2013-1	Elimination of the Earned Income Disallowance (EID) Calculation	X		
2014-1a*	(Re-Proposed) Focus Forward Pilot Program Part I, Case Management, Incentives and Escrow		X	
2014-1b*	(Re-Proposed) Focus Forward Part II, Time Limit and Rent Structure		X	
2014-2*	Eliminate Requirement to Re-Determine Rent Reasonableness when HUD Decreases Fair Market Rents (FMRs)	X		
2014-3**	Freeze on Contract Rent Increases	X		
2014-4 (amended in FY2015)	Increased Tenant Contribution—Up to 35 Percent of Gross Income	X		
2015-2	Project-Based Voucher Inspection Self-Certification	X		
2016-1*	Restriction on Head of Household Changes		X	
2016-2	Streamlining of PBV Selection Requirements		X	
2017-1	Phasing in the Subsidy Standard Change	X		
2017-2	Special Needs Population Direct Referral Program			X

MTW Statutory Objectives				
ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #)	ACTIVITY	REDUCE COST & ACHIEVE GREATER COST EFFECTIVENESS IN FEDERAL EXPENDITURES	PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY	INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES
2017-3 (amended in FY2018 & FY2019)	Landlord Initiatives			X
2017-4*	Setting the Payment Standards Above 110 Percent of HUD Fair Market Rents			X
2018-1*	Strengthening Partnerships through Capacity Building			X
2019-1*	Graduation Bonus		X	
2019-2	Family Self-Sufficiency Program- Waive Contract of Participation Requirements		X	
2019-3	Waiving the Requirement that a PHA Re-Determine Rent Reasonableness for Manufactured Home Spaces Annually	X		
2019-4	Streamlining the Lease-Up Process	X		X
2020-1	Increase Percentage of Project based Vouchers (PBV)			X
2020-2	Interim Housing			X
2020-3	Over Housed/Under Housed Project Based Voucher (PBV) Households			X
2020-4	Rent to Owners & Rent Reasonableness			X
2020-5**	Eliminate the 40% of Income Cap at Initial Leasing			X
2021-1	Impose Limits on PBV to HCV Conversion	X		X
2021-2	Simplify Minimum Rent Hardship Exemption	X	X	
2022-1*	Homeownership and Asset Limit for Eligibility	X		
2022-2*	Waive Full-Time Student Income Exclusion for Families Which Earn 80% of Area Median Income	X		X
2022-3*	Mainstream Turnover Voucher Issuance Flexibility			X
2022-4*	Modified PBV Contract Rents	X	X	

* Activities Not Yet Implemented

** Activities on Hold

II. General SCCHA Operating Information

A. HOUSING STOCK INFORMATION

i. Planned New Public Housing Units

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

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

Total Public Housing Units to be Added in the Plan Year 0

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

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

N/A

ii. Planned Public Housing Units to be Removed

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

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

0 **Total Public Housing Units to be Removed in the Plan Year**

iii. Planned New Project Based Vouchers

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

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	RAD?	DESCRIPTION OF PROJECT
777 West San Carlos	16	No	New construction project consisting of both family and special needs units. Of the 154 total units, 16 family units will be supported by PBVs.
961 Meridian	38	No	New construction family and veterans project. 38 family units will be supported with MTW PBVs, while 35 veterans units will be supported with HUD-VASH PBVs.
Alvarado	40	No	New construction senior project consisting of 90 total units. 40 senior units will be supported with PBVs.
Bellarmino	53	No	New construction family project consisting of 116 total units. 29 family units and 24 permanent supportive housing units will be supported with PBVs.
The Charles (formerly Charities Keyes)	44	No	New construction project consisting of 99 total units. 44 family units will be supported with PBVs.
Dupont	35	No	New construction project consisting of 141 total units. 35 family units will be supported with PBVs.
EAH Blossom Hill	6	No	New construction project consisting of 84 total units. 6 family units will be supported with PBVs.
Hawthorn	48	No	New construction project consisting of 103 total units. 26 family units and 22 chronically homeless units will be supported with PBVs.
La Avenida	7	No	New construction project consisting of 100 total units. 7 units for the chronically homeless will be supported with MTW PBVs and 25 units for veterans supported by HUD-VASH PBVs.
Residence Inn	85	No	Rehabilitation project consisting of 100 total units. PBVs will support 50 families and 35 units for those with special needs.
Roosevelt Park	20	No	New construction project consisting of 80 total units. 20 family units will be supported with PBVs.
Sonora Court	30	No	New construction family project consisting of 177 total units. 30 family units will be supported with PBVs.
Sunnyvale Block 15	22	No	New construction project consisting of 90 total units. 22 family units will be supported with PBVs.

444

Planned Total Vouchers to be Newly Project-Based

iv. Planned Existing Project Based Vouchers

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

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
2275 Ellena Dr	1	Leased/Issued	No	Family project consisting of 4 units (4 2-bedroom). One PBV unit.
2287 Pasetta Dr	1	Leased/Issued	No	Family project consisting of 4 units (4 2-bedroom). One PBV unit.
4 th and Younger	93	Leased/Issued	No	New construction permanent supportive housing project with 93 PBVs for the chronically homeless.
Mariposa Place (formerly 750 West San Carlos)	40	Committed	No	New construction family project consisting of 80 total units. 40 PBVs will support the project, directed towards those with special needs.
The Algarve	36	Committed	No	91 affordable units, 46 supported by PBVs - 36 for chronically homeless individuals and families, and 10 for HUD-VASH
Agrihood Senior Apartments	54	Committed	No	New construction senior project consisting of 165 total units. 109 of the units will be affordable, and of those 54 will be supported with PBVs for seniors.
Anne Way Residence	4	Leased/Issued	No	Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over.
Auzerais	64	Committed	No	Family project consisting of 128 total units. 64 PBVs will support the project, directed toward the homeless and those with special needs.
Bascom	11	Committed	No	Family project consisting of 90 total units. 11 will be supported with MTW PBVs and 5 with HUD-VASH PBVs.
Blossom Hill Residence	5	Leased/Issued	No	Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Calabazas	80	Leased/Issued	No	New construction family project consisting of 136 units. 80 PBVs will support the project, directed toward the homeless and those with special needs.
Carroll Inn	20	Leased/Issued	No	Family project consisting of 121 Studio units. PBV units are for disabled persons.
Casa De Novo	27	Leased/Issued	No	Family project consisting of 56 units. 27 units provide long-term supportive housing, 29 units operate as a hotel offering temporary supportive housing. PBV units are for chronically homeless families.
Casa Feliz Studios	6	Leased/Issued	No	Family project consisting of 60 studio units. PBV units are for chronically homeless families.
Charities Blossom Hill	49	Leased/Issued	No	Senior project consisting of 147 total units. 49 PBVs will support the project for seniors with special needs.
Connell Apartments	5	Leased/Issued	No	Family project consisting of 28 units (1 studio, 17 1-bedroom, and 10 2-bedroom). PBV units (2-Bedroom) are for families.
Corde Terra Senior Apartments	199	Leased/Issued	No	Senior project consisting of 199 1-bedroom units. PBV units are for persons aged 55 years and over.
Corinthian House	6	Leased/Issued	No	Senior project consisting of 102 units (62 studios and 40 1-bedroom). PBV units (1-bedroom) are for persons aged 62 years and over.
Country Hills	37	Leased/Issued	No	Family project consisting of 152 units (40 studio, 64 1-bedroom, and 48 2-bedroom). PBV units (8 studio, 16 1-bedroom, and 13 2-Bedroom) are for families.
Crescent Terrace	20	Leased/Issued	No	Senior project consisting of 48 1-bedroom units. PBV units are for persons aged 62 years and over.
Crest Avenue Apartments	4	Leased/Issued	Yes	RAD conversion of former Mod Rehab project with four 2-bedroom units.
Crossings on Monterey	20	Leased/Issued	No	Family, new construction project, consisting of 39 units (6, 1-

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
				bedroom, 18, 2-bedroom and 15, 3-bedroom). PBV units are for chronically homeless families.
Curtner SRO's	6	Leased/Issued	No	Senior project consisting of 6 SRO units. PBV units are for persons aged 62 years and over.
Cypress Gardens Senior Apartments	124	Leased/Issued	No	Senior project consisting of 124 units (111 1-bedroom and 13 2-bedroom). PBV units are for persons aged 55 years and over.
Dent Avenue Apartments	4	Leased/Issued	No	Family project consisting of 24 units (6 studio, 12 1-bedroom, and 5 2-bedroom). PBV units (2 SRO and 2 2-bedroom) are for families.
Donner Lofts – CHDR	20	Leased/Issued	No	Family project consisting of 101 units (92 studio and 9 1-bedroom). PBV units are for chronically homeless families.
Eagle Park	16	Leased/Issued	No	14 Studio and 2 1-bedroom units. PBVs are for the chronically homeless and those with special needs.
Edwina Benner Plaza	23	Leased/Issued	No	Family new construction project consisting of 66 total units. 23 PBVs for families and those with special needs.
Eklund Gardens I Apartments	10	Leased/Issued	No	Family project consisting of 10 2-bedroom units. PBV units are for families.
Eklund Gardens II Apartments	6	Leased/Issued	No	Family project consisting of 6 3-bedroom units. PBV units are for families.
Emerson North	1	Leased/Issued	No	Family project consisting of 6 studio units. PBV unit is for families.
Emerson South	1	Leased/Issued	No	Family project consisting of 6 studio units. PBV unit is for families.
Fair Oaks Senior Plaza	93	Leased/Issued	No	Senior project consisting of 124 units (11 1-bedroom and 14 2-bedroom). PBV units (80 1-bedroom and 13 2-bedroom) are for persons aged 62 years and over.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Fairlands SRO's	5	Leased/Issued	No	Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over.
Ferne	1	Leased/Issued	No	Family project consisting of 16 2-bedroom units. PBV unit is for families.
Fuji Towers	104	Leased/Issued	No	Senior project consisting of 124 units (72 studio and 68 1-bedroom). PBV units (53 studio and 51 1-bedroom) are for persons aged 62 years and over.
Gallup & Mesa	23	Leased/Issued	No	New construction family project consisting of 45 total units. 23 PBVs will support the project, directed toward the homeless and those with special needs.
Gish Apartments	6	Leased/Issued	No	Family project consisting of 35 units (9 studio, 14 2-bedroom, and 12 3-bedroom units). PBV units (3 studio and 3 2-bedroom) are for disabled families.
Hillview	132	Leased/Issued	No	132 total units, with 100 supported by Mainstream Program PBVs and 32 PBV units for the chronically homeless.
Homestead SRO's	4	Leased/Issued	No	Senior project consisting of 4 SRO units. PBV units are for persons aged 60 years and over.
Iamesi Village (North San Pedro Apartments)	60	Leased/Issued	No	Family and veteran's new construction project, with 135 total units. 60 PBVs will be dedicated to the chronically homeless and 49 for HUD-VASH.
Immanuel-Sobrato	97	Leased/Issued	No	106 total units for the chronically homeless, 97 supported with PBVss
Julian Gardens	9	Leased/Issued	No	Family, new construction project, consisting of 9 3-bedroom units. PBV units are for families.
Kifer Senior	33	Committed	No	New construction project consisting of 80 total units. 33 MTW PBVs will support units for the chronically homeless and 8 HUD-VASH PBVs will support veterans units.
Kings Crossing Apartments	25	Leased/Issued	No	Family project consisting of 94 units (34 1-bedroom, 34 2-

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
				bedroom, and 26 3-bedroom units). PBV units (9 1-bedroom, 12 2-bedroom, and 4 3-bedroom) are for chronically homeless families.
Klee/Offenbach SRO's	5	Leased/Issued	No	Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over.
Laurel Grove Family Apartments	81	Leased/Issued	No	Family, new construction project, consisting of 82 units (14 1-bedroom, 43 2-bedroom, and 25 3-bedroom units). PBV units are for families and to be identified special needs and/or chronically homeless families.
Leigh Avenue Senior Apartments	63	Leased/Issued	No	New construction senior project, 100% PBVs for seniors.
Lenzen Gardens Senior Apartments	93	Leased/Issued	No	Senior project consisting of 94 units (89 1-bedroom and 5 2-bedroom). PBV units (89 1-bedroom and 4 2-bedroom) are for persons aged 62 years and over.
Llewellyn Residence	5	Leased/Issued	No	Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over.
Lucretia Gardens	16	Leased/Issued	No	Family project consisting of 16 3-bedroom units. PBV units are for families.
Markham Plaza I (Tully Gardens)	20	Leased/Issued	No	152-unit family project with 10 SRO PBV units for disabled families and 10 PBV units for chronically homeless families.
Maryce Freelen Place	18	Leased/Issued	No	Family project consisting of 74 units (24 1-bedroom, 26 2-bedroom, and 24 3-bedroom units). PBV units (2 1-bedroom, 6 2-bedroom, and 10 3-bedroom units) are for families.
Met South	10	Leased/Issued	No	Family, new construction project, consisting of 31 units (9 studios, 8 1-bedroom, 5 2-bedroom, and 9 3-bedroom). PBV units are for seniors and large families.
Miramar Apartments	16	Leased/Issued	No	Family project consisting of 16 units (8 1-bedroom and 8 2-bedroom). PBV units are for families.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Monroe Street	8	Committed	No	Family project consisting of 65 total units. 8 family units will be supported with PBVs.
Monticelli Apartments	23	Leased/Issued	No	Family and Senior project consisting of 52 units (25 1-bedroom and 27 3-bedroom). 14 1-bedroom PBV units are for persons aged 62 and over, and 9 3-bedroom PBV units are for families.
Monterey Gateway	37	Leased/Issued	No	Senior, new construction project, consisting of 75 units (64, 1-bedroom and 11, 2-bedroom). PBV units are for chronically homeless and homeless seniors.
Moulton Plaza	8	Leased/Issued	No	Family project consisting of 66 units (30 1-bedroom, 26 2-bedroom, and 10 3-bedroom). PBV units (2 2-bedroom, and 6 3-bedroom) are for families.
Onizuka Crossing - CHDR	13	Leased/Issued	No	Family, new construction project, consisting of 58 units (27 1-bedroom, 11 2-bedroom, and 20 3-bedroom). PBV units (13 1-bedroom) are for chronically homeless families.
Opportunity Center	55	Leased/Issued	No	Family project consisting of 88 units (70 studios, 12 1-bedroom, and 6 2-bedroom). PBV units (48 studio, 3 1-bedroom, and 4 2-bedroom) are for chronically homeless families.
Orchard Ranch (Palomino)	18	Leased/Issued	No	Family, new construction project, consisting of 18 total units. PBVs units are for large families, those with special needs, and chronically homeless families
Orchard Ranch (Overo)	8	Leased/Issued	No	Family, new construction project, consisting of 8 units. PBVs are for those at risk of homelessness
Orchard Ranch (Tobiano)	14	Leased/Issued	No	Family, new construction project, consisting of 14 total units. PBVs units are for large families, families at risk of homelessness, and chronically homeless families
Page Street	27	Leased/Issued	No	New construction family project consisting of 81 total units. 27 PBVs will support the project,

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
				directed toward the homeless and those with special needs.
Park Avenue Senior Housing	99	Leased/Issued	No	Senior, new construction, 94 1-bedroom, 5 2-bedroom. PBV units are for persons aged 55 years and over.
Parkside Studios	7	Leased/Issued	No	Family project consisting of 59 units (58 studios and 1 1-bedroom). PBV units (7 studios) are for chronically homeless families.
Parkview Senior Apartments	24	Leased/Issued	No	Senior project consisting of 140 1-bedroom units. PBV (24 1-bedroom) units are for persons aged 55 years and over.
Poco Way Apartments	10	Leased/Issued	No	Family project consisting of 130 units (14 1-bedroom, 54 2-bedroom, 54 3-bedroom and 8 3-bedroom units). PBV units (3 1-bedroom, 3 2-bedroom, and 4 3-bedroom) are for families.
Pollard SRO's	5	Leased/Issued	No	Senior project consisting of 5 SRO units. PBV units are for persons aged 60 years and over.
Quetzal Gardens	32	Leased/Issued	No	Family, new construction project, consisting of 70 total units. 32 PBVs dedicated to large families, those with special needs, and the chronically homeless
Renascent Place	160	Leased/Issued	No	Family, new construction project, consisting of 160 units. PBV units are for chronically homeless families.
Rincon Gardens Senior Apartments	198	Leased/Issued	No	Senior project consisting of 200 units (190 1-bedroom and 10 2-bedroom). PBV units (189 1-bedroom and 9 2-bedroom) are for persons aged 55 years and over.
Royal Oak Village	22	Committed	No	Family project consisting of 73 total units. 22 PBVs will support large families.
San Antonio Place	30	Leased/Issued	No	Family project consisting of 120 units (118 studio, 1 1-bedroom, and 1 2-bedroom). 30 studio PBV units are for families

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
San Veron Park Apartments	6	Leased/Issued	No	Family project consisting of 32 units (10 2-bedroom, 15 3-bedroom, and 7 4-bedroom). PBV units (3 2-bedroom, 2 3-bedroom, and 1 4-bedroom) are for families
Sango Court	40	Committed	No	Family project consisting of 101 total units. 40 MTW PBVs will support the project, directed toward the homeless and those with special needs. 7 HUD-VASH PBVs will also support the project.
Santa Familia	13	Leased/Issued	No	Family project consisting of 79 units (30 1-bedroom, 23 2-bedroom, and 26 3-bedroom). PBV units (4 1-bedroom, 4 2-bedroom, and 5 3-bedroom) are for families
Second Street Studios	134	Leased/Issued	No	Family, new construction project, consisting of 135 units (128 studios, 6 1-bedroom, and 1 2-bedroom units). PBV units are for chronically homeless families.
Shorebreeze	20	Leased/Issued	No	Family, new construction project, consisting of 61 total units. 20 PBVs for those at risk of homelessness.
Sobrato Apartments	40	Leased/Issued	No	Existing project with 40 PBVs for chronically homeless families.
Stevenson House	10	Leased/Issued	No	Senior project consisting of 120 studio and 1-bedroom units. PBV units (6 studio and 4 1-bedroom) are for persons aged 62 years and over.
Sunset Gardens Senior Apartments	74	Leased/Issued	No	Senior project consisting of 75 units (70 1-bedroom and 5 2-bedroom). PBV units (70 1-bedroom and 4 2-bedroom) are for persons aged 55 years and over.
Timberwood Apartments	20	Leased/Issued	No	Family project consisting of 286 units (84 studios, 164 1-bedroom, and 38 2-bedroom). PBV units (6 studio, 6 1-bedroom, and 8 2-bedroom) are for families.
Tyrella Gardens Apartments	11	Leased/Issued	No	Family project consisting of 56 units (12 1-bedroom, 32 2-bedroom, and 12 3-bedroom). PBV units (4 1-bedroom, 6 2-

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

3,245

Planned Total Existing Project-Based Vouchers

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

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

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

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

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

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

GENERAL DESCRIPTION OF ALL PLANNED CAPITAL EXPENDITURES DURING THE PLAN YEAR

SCCHA acquired 2.3 acres of land on Race Street in San José, utilizing \$12 million in MTW funds. Two projects are planned at this site, Alvarado Park Senior Housing that includes 89 affordable units that targets seniors and Bellarmino Place Family Housing comprised of 115 affordable units for families. SCCHA anticipates that the design documents and financing plan will be final by the end of FY2022.

In prior Plan Years, MTW funds in the amount of \$30 million were used to acquire property on East Santa Clara Street. This property will be home to at least four affordable housing developments providing hundreds of multi-family affordable housing units. Design development will continue in to FY2022 and MTW funds will be used in pursuing necessary land use approvals.

Approximately \$5 million of MTW funds will be used for the rehabilitation of 20 units at San Pedro Gardens Apartments.

Approximately \$20.5 million of MTW funds will be used for the acquisition and capital repairs of three HUD-controlled senior properties subject to foreclosure (Jardines Paloma Blanca, Girasol Housing, and Las Golondrinas Apartments), totaling 152 units.

B. LEASING INFORMATION

i. Planned Number of Households Served

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

PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH:	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED**
MTW Public Housing Units Leased	48	4
MTW Housing Choice Vouchers (HCV) Utilized	201,300	16,775
Local, Non-Traditional: Tenant-Based^	0	0
Local, Non-Traditional: Property-Based^	10,884	907
Local, Non-Traditional: Homeownership^	0	0
Planned Total Households Served	212,232	17,686

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED**
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Tenant-Based	N/A	0	0
Property-Based	Create Affordable Housing Preservation Fund for SCCHA and Affiliate-Owned Properties/Activity 2012-4	10,884	907
Homeownership	N/A	0	0

- * “Planned Number of Unit Months Occupied/Leased” is the total number of months the MTW PHA plans to have leased/occupied in each category throughout the full Plan Year.
- ** “Planned Number of Households to be Served” is calculated by dividing the “Planned Number of Unit Months Occupied/Leased” by the number of months in the Plan Year.
- ^ In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households to be served, the MTW PHA should estimate the number of households to be served.

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

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

HOUSING PROGRAM	DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS
MTW Public Housing	None
MTW Housing Choice Voucher	The Santa Clara County rental market continues to be a challenge to leasing up of Housing Choice Vouchers. HCV holders who are looking for housing continue to face extremely high rents and reluctance on the part of landlords. In FY2022, SCCHA increased its voucher payment standards for SRO through four-bedroom units and continued landlord recruitment and retention efforts. SCCHA continues to engage a community partner to assist voucher holders in their housing search. SCCHA is also continuing to encourage the expansion of affordable housing supply through the use of Project-Based Vouchers in partnership with the City of San José and the County of Santa Clara. SCCHA anticipates that approximately 400 MTW PBV units will finish construction in FY2023.
Local, Non-Traditional	None

C. WAITING LIST INFORMATION

i. Waiting List Information Anticipated

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

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED	PLANS TO OPEN THE WAITING LIST DURING THE PLAN YEAR
Federal MTW Public Housing Units	Site Based	685	Closed	No
Federal MTW Housing Choice Voucher Program	Program Specific*	34,560*	Open	Yes

Project-Based, Local, Non-Traditional MTW Housing Assistance Program	Site Based	3,069	Partially Open	Yes
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* SCCHA’s Interest List opened in December 2020. Smaller waiting lists are created by randomly drawing active applicants from its interest lists, as vouchers are available or PBV projects come online.

Please describe any duplication of applicants across waiting lists:

SCCHA has 11 properties where households are assisted through Project-Based, Local, Non-Traditional MTW Housing Assistance Programs. Buena Vista Mobile Home Park does not have a waitlist. The number of people on the waitlists for the rest of the projects are as follows: 99 for DeRose Gardens Apartments, 117 for El Parador Apartments, 110 for San Pedro Gardens Apartments, 87 for Pinmore Gardens Apartments, 318 for Blossom River Apartments, 450 for Helzer Court Apartments, 88 for Morrone Gardens Apartments, 123 for Clarendon Apartments, 518 for Bendorf Drive Apartments, 1,081 for Ford Road Plaza.

ii. Planned Changes to Waiting List in the Plan Year

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

WAITING LIST NAME	DESCRIPTION OF PLANNED CHANGES TO WAITING LIST
Federal MTW Housing Choice Voucher Program	The waiting list re-opened in FY2021 as an always-open Interest List allowing individuals to add themselves to the list at any time and/or update their information. There are no planned changes to the waiting/interest list for FY2023.

III. Proposed MTW Activities (HUD Approval Requested)

This section describes two new MTW activities that SCCHA proposes to implement in FY2023.

ACTIVITY 2023-01:

(Proposed Activity)

DELAY NON-INCOME VERIFICATION AFTER NEW ADMISSION

Activity Description

The average rent continues to increase in Santa Clara County, thus widening the gap between families who can and cannot afford rent in neighborhoods of opportunity. Although SCCHA is a valuable resource to the community, there are nearly 35,000 families still waiting for housing assistance on its Interest List.

HUD regulations 24 CFR 5.216, 24 CFR 5.512, 24 CFR 5.609, and 24 CFR 5.508 require PHAs to verify applicants' Social Security number, eligible immigration status (if applicable), and date of birth to determine program eligibility and rent calculation. This activity would allow up to 180 days after the New Admission to comply with these requirements. The intention is to facilitate quicker lease-up times and to prevent interest list withdrawals due to incomplete applications. The COVID pandemic led to government agencies such as the California Department of Motor Vehicles and Social Security Administration offices to close to the public. These closures created additional delays and costs for families to obtain required documents to secure housing within PHA's timelines. Waiting for these documents to complete the initial eligibility process can take weeks, thus holding up move-ins for families or risking withdrawal from the interest list.

SCCHA proposes to allow families to self-certify their Social Security number, eligible immigration status, and date of birth if they are unable to provide verification at the time of initial eligibility determination. Families will be required to provide the documentation no later than 180 days past the New Admission effective date. Enterprise Income Verification will be used to ensure families admitted to the program have valid Social Security Numbers and birthdates. SCCHA will follow non-compliance procedures if a family intentionally gave incorrect information.

Allowing additional time for families to provide non-income verification would prevent delays in the eligibility determination process. The activity would also facilitate shortened wait times between voucher issuance and lease up, consequently enabling families to move into stable housing more quickly.

Relation to Statutory Objectives

This activity supports the statutory objective of increasing housing choices for low-income families by shortening the time for eligibility determination to allow families to search for housing or move into a project-based unit more efficiently.

Anticipated Schedule for Achieving the Stated Objectives

SCCHA anticipates implementing this activity upon approval.

Proposed Baseline, Benchmarks, Metrics and Data Collection

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

Activity 2023-01: DELAY NON-INCOME VERIFICATION AFTER NEW ADMISSION				
Unit of Measurement	Baseline	Benchmark	Projected Outcome	Benchmark Achieved?
HC #5: Increase in Resident Mobility				
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	770	841	TBD	N/A

Cost Implications

SCCHA anticipates that the proposed activity will not have any cost implications for the agency.

Authorization for the Activity

The proposed activity is authorized in Attachment C, Paragraph D (3)(b) of SCCHA’s MTW Agreement with HUD and waives certain provisions of 24 CFR 982.516, 24 CFR 5.512, 24 CFR 5.609, and 24 CFR 5.508 as necessary to implement SCCHA’s MTW Plan. This authorization is needed to implement eligibility requirements that deviate from the 1937 Act.

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

This activity does not qualify as a Rent Reform Initiative.

This activity was made available for public review and included as a proposed activity in the public hearing held for the FY2023 MTW Annual Plan. SCCHA will obtain approval from its Board of Commissioners prior to the activity’s implementation. The impact of this activity will be evaluated annually in SCCHA’s MTW Report.

ACTIVITY 2023-2:

(Re-Proposed Activity)

STRIVE SCHOLARSHIP FUND

Activity Description

Since 2015 SCCHA has been providing funds for the Strive Scholarship Program, an educational scholarship program that provides financial assistance for Section 8 participants, public housing residents and residents of SCCHA-owned affordable housing who are enrolled or enrolling in higher education. Prior to this fiscal year, the Strive Scholarship program was authorized by MTW activities 2014-1 and 2014-1a, which are tied to the Focus Forward Program. SCCHA is now requesting to separate the Strive Scholarship fund in its own activity because the Focus Forward activities are being closed out.

The annual scholarships will be awarded as unrestricted funds which can be used to offset the cost of tuition or fees, books, high-speed internet, transportation, to assist with household expenses, or for any other need identified by the applicant. SCCHA may allocate up to \$75,000 annually, in MTW funds, to be divided among eligible applicants. The Scholarship Fund may be supplemented with non-MTW funds for awards to residents of SCCHA affiliated properties or participants in one of SCCHA’s non-MTW programs who would not be eligible for an MTW-funded scholarship.

Eligibility Requirements are as follows:

1. Applicants must receive SCCHA housing assistance through one of its rental subsidy programs or reside in one of its affiliated affordable housing properties.
2. Applicants must have a Grade Point Average of 2.5 or above.
3. Applicants must intend to enroll in a full-time course of study at an institution of higher learning in the Fall following the award cycle.
4. Applicants must have received no more than three previous Strive Scholarship awards.
5. Applicants must submit a complete application, including a description of their educational and professional goals, information about how they have begun working toward those goals through extra-curricular activities, and a recommendation from an individual who has observed their drive and commitment to succeed.

In awarding the scholarships, SCCHA staff is guided by the following objectives:

- 1) Reduce barriers to and encourage pursuit of higher education
- 2) Recognize outstanding effort and achievement
- 3) Serve as many students as possible
- 4) Make a significant impact on students’ educational expenses
- 5) Make the award worth the effort of the application process
- 6) Provide maximum flexibility to students in using the funds
- 7) Minimize administrative burden to the agency in coordinating this activity

Relation to Statutory Objectives

This activity supports the statutory objective of promoting participants’ economic self sufficiency.

Anticipated Schedule for Achieving the Stated Objectives

SCCHA anticipates implementing this activity upon approval.

Proposed Baseline, Benchmarks, Metrics and Data Collection

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

Activity 2023-2: Strive Scholarship Fund				
Unit of Measurement	Baseline	Benchmark	Projected Outcome	Benchmark Achieved?
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Number of households receiving services aimed to increase self sufficiency (increase)	0	75	N/A	N/A

Cost Implications

SCCHA anticipates that the proposed activity will increase the agency’s expenses. The agency expects to use up to \$75,000 in MTW funds, annually.

Authorization for the Activity

The proposed activity is authorized in Attachment C, Paragraph E of SCCHA’s MTW Agreement with HUD and waives certain provisions of Section 23 of the 1937 Act and 24 CFR 984 as necessary to implement SCCHA’s MTW Plan. This authorization is needed to use MTW funds for the Strive Scholarship Program.

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

This activity does not qualify as a Rent Reform Initiative.

This activity was made available for public review and included as a proposed activity in the public hearing held for the FY2023 MTW Annual Plan. SCCHA will obtain approval from its Board of Commissioners prior to the activity’s implementation. The impact of this activity will be evaluated annually in SCCHA’s MTW Report.

RE-PROPOSED ACTIVITY 2010-4:

(Re-Proposed Activity)

ALLOCATING PROJECT BASED VOUCHERS TO SCCHA-OWNED PROJECTS WITHOUT COMPETITION

Activity Description

This activity was original proposed and approved by HUD to allow SCCHA to issue Project Based Vouchers (PBVs) to projects owned by SCCHA or a SCCHA affiliate entity without needing to go through a competitive selection process. The re-proposal of this activity would leave the original activity in place and in addition SCCHA is adopting a Housing Opportunities Through Modernization Act (HOTMA) provision that has not yet been implemented by HUD. A modification to Activity 2010-4 will allow SCCHA, at its discretion, to enter into a HAP contract for housing to be rehabilitated or newly constructed even if construction had begun without an AHAP in place. The execution of an AHAP will be at SCCHA’s discretion. SCCHA may not enter into a HAP contract under this discretionary provision unless the owner can confirm that any work from the date of proposal submission or, if the housing was exempt from competitive selection, board approval of the PBV award complies with the following:

- Applicable prevailing wages were paid for the work
- Section 3 and federal equal employment opportunity requirements were followed
- No work began prior to completion of an environmental review pursuant to 24 CFR Parts 50 or 58 and a RROF was issued by HUD
- Any project with 9 or more units includes the number of accessible units required by Section 504 of the Rehabilitation Act
- The project complies with any applicable provisions of the Fair Housing Act, including Fair Housing Design Standards, and the Americans with Disabilities Act
- Applicable broadband infrastructure requirements were followed
- The owner is eligible to participate in the PBV program (e.g., is not debarred, suspended, or subject to a similar exclusion) and has disclosed any potential conflicts of interest.”

Relation to Statutory Objectives

This activity supports the statutory objective of increasing housing choices for low-income families.

Anticipated Schedule for Achieving the Stated Objectives

SCCHA anticipates implementing this activity upon approval.

Proposed Baseline, Benchmarks, Metrics and Data Collection

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

Activity 2010-4: Allocating Project-Based Vouchers to SCCHA-Owned Projects Without Competition				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease).	\$12,164	\$0	TBD	TBD
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease).	158	0	TBD	TBD

Cost Implications

SCCHA anticipates that the proposed activity will not have any cost implications for the agency.

Authorization for the Activity

The proposed activity is authorized in SCCHA’s Moving To Work Agreement, Attachment C, Paragraph D 7a, of the 1937 Act and 24 CFR 982.1, 982.102 AND 24 CFR Part 983 and waives certain provisions of Section 8 (o)(13)(B and D) of the 1937 Act and 24 CFR 982.1, 982.102 and 24 CFR Part 983 as necessary to implement this MTW activity. This authorization is needed to allow SCCHA to select its own properties to receive PBVs, bypassing a competitive selection process and implement certain provisions of the Housing Opportunities Through Modernization Act (HOTMA) that have not yet been implemented by HUD.

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

This activity does not qualify as a Rent Reform Initiative.

This activity was made available for public review and included as a proposed activity in the public hearing held for the FY2023 MTW Annual Plan. SCCHA will obtain approval from its Board of Commissioners prior to the re-proposed activity’s implementation. The impact of this activity will be evaluated annually in SCCHA’s MTW Report.

IV. Approved MTW Activities (HUD Approval Previously Granted)

To date, SCCHA has had 57 activities approved by HUD. Of these, ten were closed out in previous years. SCCHA anticipates closing out activities 2014-1a, 2014-1b, and 2020-5 in the FY2022 MTW Annual Report. The first four numbers of each activity signify the fiscal year in which each activity was approved. Except where indicated in the activity status explanation, SCCHA does not anticipate any changes or modifications to the activities during the Plan year.

Implemented Activities

ACTIVITY 2009-1: REDUCED FREQUENCY OF TENANT REEXAMINATIONS

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

DESCRIPTION OF MTW ACTIVITY

This activity, originally implemented in 2009, reduces the frequency of participant reexaminations in the voucher program. Participants with fixed incomes are reexamined every three years and participants with non-fixed incomes are reexamined every two years. In FY2015, SCCHA amended this activity to include its four public housing units under the new reexamination schedule. By including its public housing units under the modified reexamination schedule, SCCHA will be furthering administrative streamlining and labor savings for both its Section 8 and 9 programs.

In FY2020, SCCHA re-proposed this activity as a technical amendment in response to the widespread economic disruption caused by the COVID-19 pandemic. The re-proposed activity assigned MTW participants with non-fixed incomes to a three-year regular re-examination cycle, and MTW participants with fixed incomes to a four-year cycle. This re-proposed activity took effect immediately as a technical amendment, bypassing the public notice and comment period and was intended to last until June 30, 2021 or six months after the shelter-in-place orders have been lifted, whichever is longer.

UPDATE ON MTW ACTIVITY

SCCHA re-proposed Activity 2009-1 as a technical amendment again in FY2021, extending the amendment from FY2020 due to the ongoing impact of the COVID-19 pandemic. The FY2021 amendment extends this modified activity through FY2023 (ending June 30, 2023).

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity during FY2023.

ACTIVITY 2009-2: EXPEDITING INITIAL ELIGIBILITY INCOME VERIFICATION PROCESS

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

Extending the documentation timeframe continues to provide administrative relief, both to applicants and to SCCHA. SCCHA will continue to use this activity in FY2023.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

The Chronically Homeless Direct Referral (CHDR) program was implemented in FY2011. The CHDR program increases housing choices and mobility by assisting the homeless population through a more targeted and efficient process than the standard voucher waiting list system. Following a housing-first model, identified chronically homeless families not on the voucher waiting list are referred for project-based housing assistance and connected to case management services with local service providers. In FY2016 SCCHA amended and extended its agreement with Santa Clara County's Office of Supportive Housing, which administers the referral of applicant and oversees the agencies providing intensive case management services

UPDATE ON MTW ACTIVITY

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

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

This activity was placed on hold in the FY2022 Plan, as SCCHA intended to close this activity after transitioning to our online site-based waiting lists. However, we have found this flexibility continues to assist PBV property owners in filling vacancies; therefore, SCCHA will continue to use this activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

This activity, first implemented in 2010, allows SCCHA to utilize the owner-provided Tenant Income

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

UPDATE ON MTW ACTIVITY

SCCHA currently uses property-owner TIC documentation for initial eligibility and at each regularly scheduled reexamination to verify income and family composition.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

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

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA changed the structure of its waiting list system to a permanently open interest list, which was launched in FY2021. As with the waiting list, SCCHA operates one combined interest list for both the City of San José and County of Santa Clara. SCCHA will continue to operate this joint interest list for the Housing Choice Voucher (HCV) and the Project-Based Voucher (PBV) Programs.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

2009-14: PAYMENT STANDARD CHANGES BETWEEN REGULAR REEXAMINATIONS

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2010 AMENDED: FY2014

DESCRIPTION OF MTW ACTIVITY

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

and owner.

UPDATE ON MTW ACTIVITY

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

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA continues to save costs of staff time previously spent on this task.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

This MTW activity allows the application of the current payment standard (if the payment

standard has increased since the family’s last regular reexamination) to the rental assistance calculation at interim reexaminations.

UPDATE ON MTW ACTIVITY

Since implementation in FY2010, SCCHA has met the statutory objective of reducing administrative costs and increasing housing choice for low-income families. SCCHA has realized savings in staff hours and cost of tasks.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA last utilized this activity in early 2022 to allocate PBVs to the Bellarmino and Alvarado projects, both in San Jose. SCCHA tentatively plans to utilize this activity in FY2023 to allocate PBVs to the Hawthorn, Trillium, Sage, and Elderberry projects, also in San Jose. SCCHA is re-proposing this activity in this years MTW Plan to add certain advantageous HOTMA provisions which have not been implemented by HUD.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

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

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

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

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

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

UPDATE ON MTW ACTIVITY

SCCHA continues to realize the ongoing benefits associated with reduced costs and administrative streamlining related to this activity.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

The purpose of the activity is to enhance the occupancy stability in the PBV program, which will result in reduced staff time spent processing PBV move-outs and vacancy outreach. Project-based participants are required to remain in their PBV units for a minimum of two years prior to becoming eligible to request a tenant-based voucher to move with continued assistance.

The activity does not apply to families:

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

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

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA’s development activities will expand in FY2023. Development and financing efforts continue on Alvarado Park Senior Housing (89 units) and Bellarmino Place Family Housing (115 units). The two developments were purchased with \$12 million in MTW funds. Development and financing will also continue on the four affordable housing developments at the East Santa Clara site. Approximately \$30 million in MTW funds were used purchase the land for what will be four developments totaling 471 units.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA continues to use this activity to preserve the long-term stability and viability of existing SCCHA owned and affiliate owned housing. The fund is used to respond to planned events, such as paying soft debt to the City of San Jose to acquire more of an ownership stake in the assets, and unplanned events arising as properties age. SCCHA plans to use approximately \$5 million in MTW funds for the rehabilitation of 20 units at San Pedro Gardens Apartments during FY2023. SCCHA is also planning to acquire three senior properties subject to foreclosure at HUD’s invitation. During FY2022, HUD notified SCCHA that the Jardines Paloma Blanca, Girasol Housing, and Las Golondrinas Apartments projects in San Jose would be subject to foreclosure by HUD, and inquired whether SCCHA would acquire these projects and undertake the Rental Assistance Demonstration (RAD) process. SCCHA is planning to spend approximately \$20.5 million in MTW funds to acquire these projects.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

This activity eliminates the HUD-mandated Earned Income Disallowance (EID) calculation. The agency implemented this activity in early FY2015. Since implementation, this activity continues to decrease staff time required to calculate a family’s rent portion and reduces errors associated with calculating potential income exclusions.

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

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

PLAN YEAR APPROVED: FY2014 IMPLEMENTED: FY2015 AMENDED: FY2015

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

This activity was approved and implemented in FY2015 and allows Project Based Voucher owners and tenants to self-certify the correction of reported Housing Quality Standards (HQS) deficiencies within the 30-day period after the initial HQS inspection. This activity only applies to HQS deficiencies which are not life threatening. This activity reduces expenditures by eliminating the need for scheduling and conducting a re-inspection.

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

ACTIVITY 2015-3: MODIFIED ELDERLY DEFINITION FOR PBV

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

This change in the definition allows SCCHA to refer a larger pool of applicants (any family with Head of Household or Spouse aged 55 and older) from its PBV waiting list to fill vacancies in these units and will allow the Agency to project-base 100% of the units in a project with aged 55 or older limitations (project is not subject to the 25% PBV per project cap). SCCHA increased the number of available units for households who otherwise would not have qualified under the property’s definition of elderly.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

ACTIVITY 2016-2: STREAMLINING OF PBV SELECTION REQUIREMENTS

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

ACTIVITY 2017-1: PHASING IN THE SUBSIDY STANDARD CHANGE

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA continues to realize the ongoing benefit of reduced costs and an increase in the number of households served.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

ACTIVITY 2017-2: SPECIAL NEEDS POPULATION DIRECT REFERRAL PROGRAM

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

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

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

ACTIVITY 2017-3: LANDLORD INITIATIVES (& RE-PROPOSED)

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

DESCRIPTION OF MTW ACTIVITY

This activity originally authorized SCCHA to administer loyalty bonus payments to Section 8 landlords who re-rent their unit to SCCHA program participants. Implemented in March 2017, SCCHA re-proposed the activity in FY2018 to streamline the process of administering the vacancy payments originally based on 80 percent of the previous contract rent for up to 30 days. Approved by HUD, loyalty bonus payments are now set within the range of \$500 and \$1,500 – an amount that was determined to be reasonable after evaluating the program-wide contract rent average. Moderate Rehabilitation and Project-Based Voucher vacancy payments remain at 80 percent of the previous contract rent.

Re-proposed again in FY2019, Activity 2017-3 expands the initiatives SCCHA offers landlords to increase and maintain rental units available for Section 8 families. Offering a one-time bonus payment for new landlords between \$500 and \$2,500—based on a program-wide contract rent average, bonus payments provide new owners with an incentive to participate in the HCV program.

This activity increases the number of HCV units that are re-leased to HCV participants, ensuring the long-term viability of units that will be available to HCV low-income tenants and provides an incentive for new owner participation in the HCV program.

UPDATE ON MTW ACTIVITY

SCCHA originally implemented the use of loyalty bonus payments in March 2017 before seeking to streamline the process of administering the payments in FY2018. The expansion of the initiative in FY2019 offering one-time bonus payments to new owners who rent to a Section 8 tenant was implemented in January 2019. The loyalty bonus payment is currently set at a flat \$1,500 amount.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

This activity modifies certain aspects of the Family Self Sufficiency (FSS) program in order to reduce the administrative burdens on both the participant families and SCCHA, while broadening the pool of families who could benefit from the FSS program’s escrow savings account. First, the activity eliminates the requirement in the FSS Contract of Participation (CoP) (HUD Form 52560) that enrolling families must have been subject to an income reexamination within 120 days of the enrollment, and instead uses the family

income as determined at the last regular reexamination, which may be up to two years before enrollment for families which are not on fixed incomes. Second, the activity allows the successful maintained employment of any adult member of the enrolled family – rather than just the Head of Household – to count towards the family’s FSS goals. As long as at least one adult family member completes the Individual Training and Services Plan, the family will be considered a “successful FSS completion” and will receive the escrow payout.

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

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

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA continues to use this activity for manufactured home space rentals in the HCV program.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

2019-4: STREAMLINING THE LEASE UP PROCESS

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

DESCRIPTION OF MTW ACTIVITY

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

SCCHA created a new RFTA form that consolidated certain sections which required owners to input duplicative information. Additionally, SCCHA created a “Mandatory Lease Information” form which acts as an addendum to the owner’s lease agreement. The goal of this form is to save staff time by providing the information HUD requires to be in the owner’s lease on a single page that the tenant and owner will sign and submit along with the lease. This will save staff time because they will no longer need to sift through the entire lease to find the HUD required elements and simultaneously achieve faster approval of the HAP contract for owners.

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

2020-1: PBV PROGRAM CAP

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA will utilize this activity when the number of Project Based Voucher units exceeds the 20% Program Cap threshold.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

2020-2: INTERIM HOUSING

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

DESCRIPTION OF MTW ACTIVITY

This activity was approved in FY2020 and creates a local rental subsidy program to assist special needs populations. SCCHA is partnering with the City of San Jose and the County of Santa Clara to provide interim (short-term) housing to individuals and families who are approved for a Permanent Supportive Housing (PSH) unit to which SCCHA has attached a PBV, but the unit is not yet ready for occupancy. The interim housing will move these highly vulnerable clients off the street while they await their permanent home and will provide stability and allow case managers to begin engaging with the clients.

UPDATE ON MTW ACTIVITY

SCCHA and the County entered into an Agreement for services for Pedro Street Interim housing on December 1, 2020. The first residents moved into the Pedro Street property in May, 2021. In the first half of FY22 SCCHA and the County's Office of Supportive Housing collaborated to change the time of applicant move-in from after SCCHA approval to upon referral by the local Continuum of Care. If and when the applicant is approved by SCCHA, SCCHA pays for the interim housing costs from the time of move in until the permanent unit is ready for lease up. This change allows the applicant to be safely and stably housed while going through the eligibility processes of the property and SCCHA, instead of after SCCHA approval, which could be weeks to months after the original referral. SCCHA anticipates meeting the benchmark for this activity in 2023.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity's metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

2020-3: OVER HOUSED/UNDER HOUSED PBV HOUSEHOLDS

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

2020-4: RENT TO OWNERS & RENT REASONABLENESS

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

DESCRIPTION OF MTW ACTIVITY

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

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

UPDATE ON MTW ACTIVITY

SCCHA utilizes this activity on an ongoing basis and will continue to utilize the activity during FY2023.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes or modifications to this activity and its authorizations during FY2023.

2021-1: IMPOSE LIMITS ON PBV TO HCV CONVERSION

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

This activity was implemented effective January 4, 2022.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity in FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the metrics or data collection for this activity in FY2023.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity in FY2023.

2021-2: MINIMUM RENT HARDSHIP EXEMPTION

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

DESCRIPTION OF MTW ACTIVITY

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

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

UPDATE ON MTW ACTIVITY

SCCHA’s Administrative Plan was updated and staff were trained on the new process at the beginning of FY2022. SCCHA anticipates this activity will increase self-sufficiency and cost effectiveness.

PLANNED NON-SIGNIFICANT CHANGES

SCCHA does not anticipate any non-significant changes to this activity and its authorizations during FY2023.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no changes to the activity’s metrics, baselines, or benchmarks.

PLANNED SIGNIFICANT CHANGES

SCCHA does not anticipate any significant changes to this activity and its authorizations during FY2023.

2022-3: MAINSTREAM TURNOVER VOUCHER ISSUANCE FLEXIBILITY

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

DESCRIPTION OF MTW ACTIVITY

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

UPDATE ON MTW ACTIVITY

This activity was implemented in FY2022.

PLANNED NON-SIGNIFICANT CHANGES

There are no planned non-significant changes to this activity.

PLANNED CHANGES TO METRICS/DATA COLLECTION

There are no planned changes to the metrics or data collection for this activity.

PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity or its authorizations.

Activities Not Yet Implemented

2014-1a: FOCUS FORWARD PILOT PROGRAM PART I - CASE MANAGEMENT, INCENTIVES & ESCROW

PLAN YEAR APPROVED: FY2014

PLAN YEAR AMENDED: FY2018

The Focus Forward Program (FFP) is an expanded version of the traditional FSS program and will support HCV participants in increasing and sustaining a higher level of self-sufficiency. Originally proposed in the FY2014 MTW Plan, SCCHA re-proposed the FFP with a more robust case management and ongoing program-incentives component. The enhanced FFP will promote accountability and motivate participants to pursue higher education, develop 21st century job skills and set/achieve realistic self-sufficiency goals.

After additional review of the success of time-limited voucher programs, SCCHA has determined that this pilot program does not meet the needs of the local community. Many of these concerns are specific to Santa Clara County, including a major point that, due to the high cost of living, FFP graduates would still not meet income requirements to remain living in the County without assistance.

SCCHA will continue to reevaluate the program and explore other avenues to self-sufficiency, absent the time-limit. This activity will be closed out in the FY2022 MTW Report. If SCCHA decides to pursue a different program model in the future, a new MTW activity will be used.

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

There are no planned changes to the activity's metrics, baselines, or benchmarks.

This activity will be closed out in the FY2022 MTW Report.

2014-1b: FOCUS FORWARD PILOT PROGRAM PART II - TIME LIMIT, RENT STRUCTURE & LIMITED PORTABILITY

PLAN YEAR APPROVED: FY2014

PLAN YEAR AMENDED: FY2018 &
FY2020

SCCHA originally proposed the Focus Forward Program (FFP) as Activity 2014-1 as a modified version of the Family Self Sufficiency program, then amended and separated out elements the FFP in the FY2017 MTW Annual Plan. The case management, escrow account, and economic incentives aspects were consolidated into the re-proposed Activity 2014-1a, and the time-limiting of the housing voucher and modified rent structure were re-proposed as Activity 2014-1b.

After additional review of the success of time-limited voucher programs, SCCHA has

determined that this pilot program does not meet the needs of the local community. Many of these concerns are specific to Santa Clara County, including a major point that, due to the high cost of living, FFP graduates would still not meet income requirements to remain living in the County without assistance.

SCCHA will continue to reevaluate the program and explore other avenues to self-sufficiency, absent the time-limit. This activity will be closed out in the FY2022 MTW Report. If SCCHA decides to pursue a different program model in the future, a new MTW activity will be used.

There are no planned non-significant changes or modifications to this activity and its authorizations during FY2023.

There are no planned changes to the activity’s metrics, baselines, or benchmarks.

This activity will be closed out in the FY2022 MTW Report.

2014-2: ELIMINATE REQUIREMENT TO REDETERMINE RENT REASONABLENESS WHEN HUD DECREASES FAIR MARKET RENTS (FMRs)

PLAN YEAR APPROVED: FY2014

This activity eliminates the HUD requirement to re-determine the rent reasonableness of affected units within 60 days of the contract anniversary date when HUD reduced FMRs by 10% or more. SCCHA expects that it will save money on staff time required for FMR analysis, comparison database upkeep, and reexamination processes. SCCHA has yet to implement this activity because HUD has not decreased FMRs since the activity was approved. SCCHA plans to implement this activity upon the event that HUD reduces FMRs by 10% or more.

There are no changes to the activity’s metrics, baselines, or benchmarks.

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023. During FY2019, SCCHA raised the threshold to redetermine rent reasonableness to 10% to align with the version of 24 CFR 982.507 effective November 2016.

2016-1: RESTRICTION ON HEAD OF HOUSEHOLD CHANGES

PLAN YEAR APPROVED:
FY2016

PLAN YEAR AMENDED:
FY2022

This activity encourages self-sufficiency by allowing the Head of Household (HoH) to leave the program and transfer his or her voucher to a remaining non-elderly, non-disabled family member only if that family member joins SCCHA’s Focus Forward Program (FFP). The new HoH who enrolls in the pilot FFP may work with assigned case managers and set economic self-sufficiency goals.

This will be implemented after SCCHA implements the FFP. As described in Activities 2014-1A and 2014-1B, SCCHA anticipates the first phases of FFP implementation to take place during late FY2021, early FY2022. Prior to implementing this activity, SCCHA will revise the metrics to include HUD standard metrics SS#6: Reducing Per Unit Subsidy Costs for Participating Households and SS#7: Increase in Agency Rental Revenue.

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

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

PLAN YEAR APPROVED: FY2017

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

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

There are no changes to the activity’s metrics, baselines, or benchmarks.

SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations during FY2023.

2018-1: STRENGTHENING PARTNERSHIPS THROUGH CAPACITY BUILDING

PLAN YEAR APPROVED: FY2018

This activity allows SCCHA to provide funds, not to surpass \$100,000 per fiscal year that can be utilized to support local service providers in building capacity, specifically geared toward service providers that offer family self-sufficiency services (i.e. job readiness programs, educational resources, etc.) to the community.

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

2019-1: GRADUATION BONUS

PLAN YEAR APPROVED: FY2019

PLAN YEAR AMENDED: FY2022

This activity, repropoed and approved in FY2022, reduces the time a zero HAP participant’s

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

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

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

2022-1: HOMEOWNERSHIP AND ASSET LIMIT FOR ELIGIBILITY

PLAN YEAR APPROVED: FY2022

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

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

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

There are no changes to the activity’s metrics, baselines, or benchmarks.

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

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

PLAN YEAR APPROVED: FY2022

This activity allows SCCHA to count income which would be excluded under 24 CFR 5.609(c)(11) towards a family’s annual income calculation. 24 CFR 5.609(c)(11) requires SCCHA, when calculating annual income for a family with a full-time student 18 years or

older, to exclude all the income of that full-time student in excess of \$480. Under this activity, SCCHA will exclude full-time student income in excess of \$480 only when the family's total annual income (before exclusion of any full-time student income) falls below 80 percent of the Santa Clara County area median income (AMI) applicable for that family's size.

There are no changes to the activity's metrics, baselines, or benchmarks.

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

2022-4: MODIFIED PBV CONTRACT RENTS

PLAN YEAR APPROVED: FY2022

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

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

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

There are no changes to the activity's metrics, baselines, or benchmarks.

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

Activities On Hold

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

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

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

There are no changes to the activity's metrics, baselines, or benchmarks. SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations.

ACTIVITY 2012-5: EXPAND TENANT SERVICES AT SCCHA- OR AFFILIATE-OWNED AFFORDABLE HOUSING PROPERTIES

This activity was implemented in FY2012 and allowed SCCHA to use its MTW funding flexibility to expand its provision of programs and services for tenants living in SCCHA or affiliate-owned non-Section 8/9 affordable rental properties. SCCHA anticipated tenants to gain some or all of the necessary skills to address daily living requirements, maintain housing, and, for work-able residents, possibly re-enter or move up in the work force.

SCCHA placed this activity on hold in FY2016 because the Agency did not – and does not expect to – utilize MTW funds for programs and services expansions at its non-Section 8/9 rental properties. Therefore, there is no implementation timeline. If non-MTW funding sources are exhausted, SCCHA will re-implement this activity.

There are no changes to the activity's metrics, baselines, or benchmarks. SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations.

ACTIVITY 2014-3: FREEZE ON CONTRACT RENT INCREASES

Implemented in FY2014, this activity imposed a freeze on any owner requested rent increases for one-year effective September 2013 through August 2014. Effective September 1, 2014, SCCHA lifted the freeze and accepted owner requested rent increases again. This activity helped reduce

costs by controlling increases to Housing Assistance Payments (HAP) while reducing labor costs but had negative effects on owner retention. Currently, there are no plans to re-implement this activity. Subsequent freezes on owner requested rent increases are subject to SCCHA's Board of Commissioners' approval and are limited to a one-year term.

There are no changes to the activity's metrics, baselines, or benchmarks. SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations.

ACTIVITY 2020-5: ELIMINATE THE 40% OF INCOME CAP AT INITIAL LEASING

This activity was proposed in a technical amendment to the FY2020 MTW Annual Plan shortly after Santa Clara County imposed Shelter-in-Place orders in response to the COVID-19 pandemic and was implemented immediately upon approval. This activity waived the requirements of 24 CFR 982.508 and allowed families to rent a unit above 40% of their income, providing a larger pool of units for them to select from. The activity was re-proposed in the FY2022 MTW Annual Plan in order to extend its expiration date, but was not utilized past the original technical amendment expiration date.

There are no changes to the activity's metrics, baselines, or benchmarks. SCCHA does not anticipate any non-significant changes or modifications to this activity and its authorizations.

SCCHA plans to close out this activity in the FY2022 MTW Annual Report.

Closed Out Activities

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

ACTIVITY	WHY THE ACTIVITY WAS CLOSED	YEAR CLOSED
<p>2010-1 Eliminating 100% Excluded Income from the Income Calculation Process</p>	<p>With the publication of PIH Notice 2013-4, issued January 28, 2013, the verification and calculation of 100% excluded income is no longer required. Therefore, SCCHA eliminated this activity in FY2013. This activity saved labor time and costs.</p>	<p>This activity was closed out in FY2013</p>
<p>2012-1 Create Standard Utility Allowance Schedule</p>	<p>SCCHA utilizes MTW Activity 2014-4, which simplifies the rent calculation method and eliminates utility allowances. Because of Activity 2014-4, MTW Activity 2012-1 is no longer necessary and was closed out prior to implementation.</p>	<p>This activity was closed out in FY2013</p>
<p>2015-1 Using UPCS or Local Inspection Standards to Determine Housing Quality Standards</p>	<p>On June 25, 2014, HUD published in the Federal Register that, effective July 1, 2014, “A PHA may comply with the biennial inspection requirement through reliance upon an inspection conducted for another housing assistance program. If a PHA relies on an alternative inspection to fulfill the biennial inspection requirement for a particular unit, then the PHA must identify the alternative standard in its administrative plan.” Therefore, this activity was closed without implementation because HUD’s directive superseded this activity.</p>	<p>This activity was closed out in FY2015</p>
<p>2020-6 Reduced Frequency of Periodic Inspections (Not Implemented/On-Hold)</p>	<p>This activity was proposed in a technical amendment to the FY 2020 MTW Annual Plan shortly after Santa Clara County imposed Shelter in Place orders in response to the COVID-19 pandemic and was implemented immediately upon Plan approval. On April 13, 2020, SCCHA adopted COVID-19 waiver HQS-5 and resumed performance of biennial HQS inspections. Families who are uncomfortable allowing the performance of an inspection could cancel biennial HQS inspections and have the inspection rescheduled to a later date removing the need to move to a three-year regular HQS inspection cycle as proposed by this activity. Under HUD COVID-19 Waiver HQS-5 SCCHA must inspect units with delayed inspections by June 30, 2022. SCCHA will continue to allow families to cancel scheduled biennial HQS inspections until December 21, 2021. Because of HQS-5 SCCHA did not re-propose this activity in a subsequent MTW Annual Plan.</p>	<p>This activity was closed out in FY2021</p>

V. MTW Sources And Uses of Funds

The information reported in Section V. serves as a placeholder until the FY2023 budget is approved by the SCCHA Board of Commissioners. At the time the FY2023 budget is approved (June 2022) SCCHA will update Section V. and re-submit the Plan to HUD.

A. ESTIMATED SOURCES AND USES OF MTW FUNDS

i. Estimated Sources of MTW Funds

FDS LINE ITEM NUMBER	FDS LINE ITEM NAME	DOLLAR AMOUNT
70500 (70300+70400)	Total Tenant Revenue	\$17,112
70600	HUD PHA Operating Grants	\$418,816,933
70610	Capital Grants	\$2,300,000
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	\$0
71100+72000	Interest Income	\$388,000
71600	Gain or Loss on Sale of Capital Assets	\$0
71200+71300+71310+71400+71500	Other Income	\$121,164
70000	Total Revenue	\$421,643,209

Note 1: Source in Analysis

70600-HUD PHA Operating Grants \$418,816,933:

This FDS line represents the sum of the following: (1) Public Housing Operating Subsidy Income \$11,633 and (2) Section 8 MTW Admin Fee & HAP Earned \$418,816,933.

7120+71300+71310+71400+71500 - Other Income \$121,164:

This FDS line represents the sum of the following: (1) Land lease \$116,000, (2) Ground lease \$4,564, (3) Other miscellaneous income \$600.

ii. Estimated Uses of MTW Funds

FDS LINE ITEM NUMBER	FDS LINE ITEM NAME	DOLLAR AMOUNT
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating - Administrative	\$26,584,015
91300+91310+92000	Management Fee Expense	\$0
91810	Allocated Overhead	\$0
92500 (92100+92200+92300+92400)	Total Tenant Services	\$322,145
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	\$26,332
93500+93700	Labor	\$0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	\$109,766
95000 (95100+95200+95300+95500)	Total Protective Services	\$66,250
96100 (96110+96120+96130+96140)	Total Insurance Premiums	\$244,224
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	\$1,155,949
96700 (96710+96720+96730)	Total Interest Expense & Amortization Cost	\$38,900
97100+97200	Total Extraordinary Maintenance	\$0
97300+97350	HAP + HAP Portability-In	\$368,405,814
97400	Depreciation Expense	\$646,752
97500+97600+97700+97800	All Other Expense	\$0
90000	Total Expenses	\$397,600,146

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

Net Balance Analysis

For Fiscal Year 2022, the net reserve balance of \$24,043,063 (MTW funding) will be used to fund the following:

I-Activity 2012-3-Acquisition & Development Funds - \$2.3M:

SCCHA anticipates the use of \$2.3M from Public Housing Capital Grant as an additional source to fund the redevelopment efforts of the Bellarmino Place project.

II-Activity 2012-3-Acquisition & Development Funds - \$6.75M:

SCCHA anticipates the use of \$6.75M to fund a variety of development projects including \$1.3M for redevelopment of the Bellarmino Place project, \$1.6M for redevelopment of the Alvarado Park project, \$3.81M for development of the East Santa Clara projects.

III-Activity 2012-4-Preservation Funds - \$10.9M:

SCCHA anticipates the use of \$10.9M to fund a variety of preservation projects including \$2.5M for development on Buena Vista Mobile Home Park, 450K for capital projects at Helzer Court Apartments, \$800K for El Parador's rehabilitation projects, \$5M for San Pedro Garden, \$2M for refinancing existing loans at DeRose Gardens Apartments, and 100K for capital projects at Deborah Drive.

IV- Activity 2012-4-Preservation Funds - Asset Management-transfer of \$1.7M:

The transfer of \$1,708,035 is for subsidizing the expenditures of the Asset Management and Other Preservation Activities of qualifying low-income housing units of properties that are owned and operated by SCCHA and/or affiliated entities.

Note 2 - Source Out Analysis

910000 - Total Operating - Administrative \$26,584,015:

This FDS line represents operation, administrative and allocated overhead/support department costs.

91810 - Allocated Overhead - \$0:

Per conversation with HUD Analyst Bella Young in 2014, the Housing Authority is not utilizing the true COCC model. Therefore, we report our Indirect Allocation costs in FDS line 91900 (Other).

92500-Total Tenant Services- \$322,145:

This FDS line is consisted of \$64K salaries/benefits, \$3K resident programs, \$1K worker's compensation insurance and \$255K for other admin contract-tenant services.

96100-Total Insurance Premiums - \$244,224:

This FDS line is consisted of \$48K liability insurance, \$191K worker's compensation insurance, and \$5K for other insurance.

96000 - Total Other General Expenses - \$1,155,949:

This FDS line is comprised of (1) \$1.1M compensated (vacation/sick) absences, (2) \$84K admin fee port out, (3) \$1K payment In Lieu of Taxes, and (4) \$6K Covid-19 Expenses.

97300+97350 - Housing Assistance Payments + HAP Portability-In \$368,405,814:

This FDS line represents the total HAP paid out \$368M and HAP Focus Forward incentive \$5K. HAP Portability -It is not budgeted in FY2022 as SCCHA is absorbing all future incoming portability.

iii. Description of Planned Use of MTW Single Fund Flexibility

PLANNED USE OF MTW SINGLE FUND FLEXIBILITY

The MTW Agreement allows SCCHA to combine public housing operating and capital funds, including development and Replacement Housing Factor (RHF)/Demolition and Disposition Transition Fund (DDTF) funds, provided under Section 9, and tenant-based voucher program funds provided under Section 8 of the 1937 Act into a single, authority-wide funding source.

In FY2022, SCCHA plans to continue to use MTW Single Fund Flexibility to pay for housing search services for participants who are experiencing challenges in finding a rental unit. The Agency also plans to continue several Information Technology Department projects, such as migrating our Section 8 software system to the Cloud, upgrading servers, upgrading our scanning systems, and expanding e-signature capabilities.

In FY2022, the agency will be continuing the rolling-out of additional features in a mobile application that will allow applicants to sign up for and manage their information on the new applicant interest list that was highlighted earlier in this section. "SCCHA 2.0" will be a comprehensive digital communication, client interface, document management, task management, and oversight system utilized by both agency staff and clients.

B. LOCAL ASSET MANGEMENT PLAN

i. Is the MTW PHA allocating costs within statute?

ii. Is the MTW PHA implementing a local asset management plan (LAMP)?

iii. Has the MTW PHA provide a LAMP in the appendix?

iv. If the MTW PHA has provided a LAMP in the appendix, please describe any proposed changes to the LAMP in the Plan Year or state that the MTW PHA does not plan to make any changes in the Plan Year.

C. RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION

i. Description of RAD Participation

RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION
N/A

ii. Has the MTW PHA submitted a RAD Significant Amendment in the appendix? A RAD Significant Amendment should only be included if it is a new or amended version that requires HUD approval.

iii. If the MTW PHA has provided a RAD Significant Amendment in the appendix, please state whether it is the first RAD Significant Amendment submitted or describe any proposed changes from the prior RAD Significant Amendment?

VI. Administrative

A. BOARD RESOLUTION ADOPTING THE FY2023 ANNUAL MTW PLAN AND CERTIFICATIONS OF COMPLIANCE

The SCCHA Board Resolution adopting the FY2023 MTW Annual Plan and the Certifications of Compliance from the County of Santa Clara and the City of San José are attached as **Appendix One** to this Plan.

B. CERTIFICATION OF PAYMENTS

SCCHA has attached signed copies of the Certification of Payments (HUD-50071) as **Appendix Two** to this Plan.

C. DISCLOSURE OF LOBBYING ACTIVITIES

SCCHA has attached signed copies of the Disclosure of Lobbying Activities (SF-LLL) as **Appendix Three** to this Plan.

D. DOCUMENTATION OF THE PUBLIC PROCESS FOR THE FY2023 ANNUAL MTW PLAN

SCCHA's FY2023 MTW Annual Plan was made available for public review from February 21, 2022 through March 23, 2022. The public hearing for the plan was held on March 14, 2022. There were zero members of the public in attendance and no written comments were received.

E. PLANNED AND ONGOING EVALUATIONS OF SCCHA'S MTW DEMONSTRATION

In FY2023, SCCHA will continue to refine its approach to data gathering and monitoring of MTW activities and their impacts on stated goals and objectives. SCCHA is exploring a full-scale study and evaluation of its MTW activities.

Appendix One: Resolution No. 22-0_

Appendix One: Certifications of Compliance

[PLACEHOLDER FOR FY2023 RESOLUTIONS AND CERTIFICATIONS OF COMPLIANCE]

Appendix Two: Certification of Payments (HUD 50071)

[PLACEHOLDER FOR CERTIFICATION OF PAYMENTS FORMS]

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

[PLACEHOLDER FOR DISCLOSURE OF LOBBYING ACTIVITIES FORMS]