

# FY2027 Moving to Work Annual Plan

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

Submitted on April XX, 2026



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## SANTA CLARA COUNTY HOUSING AUTHORITY (SCCHA)

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

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*SCCHA's mission is to provide affordable housing solutions that support people of lower incomes in Santa Clara County in achieving housing stability, opportunity, and well-being.*

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 22,000 households.**

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## I. Introduction

The FY 2027 MTW Annual Plan marks a key transition for the Santa Clara County Housing Authority (SCCHA), as the agency celebrates successful delivery of its 2020–2025 Strategic Plan and now refreshes its long-term vision for 2026–2030 with a deeper, more intentional focus on residents. Serving more than 44,000 residents as the housing authority for both the City of San José and the County of Santa Clara, SCCHA will use this plan year to acknowledge recent gains, honor progress with partners and residents, and position Moving to Work (MTW) initiatives to align with the forthcoming strategic plan.

Over the past five years, SCCHA delivered measurable results, surpassing agency targets across its core mission. Since 2020, the agency has increased households served by 4,400 families, reflecting expanded capacity and effective program administration. Today, SCCHA administers approximately 20,000 Housing Choice Vouchers, working with more than 6,000 landlords and providing over \$35 million in monthly rental subsidies to support housing stability for low-income families, seniors, veterans, and people with disabilities.

SCCHA has also significantly expanded and preserved the local affordable housing supply. During this time, the agency added 813 newly constructed or acquired affordable units, secured entitlements for an additional 662 units, and preserved approximately 1,600 units through strategic acquisitions and recapitalizations. SCCHA currently owns and manages 3,500 affordable housing units, with approximately 1,300 additional units in its active development pipeline, including family housing, senior housing, permanent supportive housing, and housing for transitional-age youth and formerly unhoused residents.

SCCHA's work to build strong community partnerships has translated into measurable outcomes for residents with the greatest needs. Through collaborations with local jurisdictions and service providers, to date 667 formerly unhoused people have been served at Willow Glen Studios. In FY2027 and beyond, SCCHA will continue support of interim housing across three sites, with a three-year total commitment of \$17,352,000. In partnership with Santa Clara County, the Housing Authority continues to support Willow Glen Studios in the amount of \$5,760,000 for three years. Additionally the Housing Authority has entered into new agreements with the City of San Jose for Pacific Motor Inn, with a three year investment of \$5,184,000, and The Arena Hotel with a 3-year investment of \$6,408,000.,

One of the most outstanding accomplishments in this five-year period was the partnership with Santa Clara County's \$950 Million affordable housing bond, Measure A, to create permanent housing for homeless families. In total, SCCHA leveraged approximately \$415

million in federal, state, county, city, and private funding and deployed more than 3,000 project-based vouchers to support Measure A developments. Over the 20-year HAP Contract term the Housing Authority anticipates investing over \$3 billion, as a key partner in Santa Clara County's homelessness system, anchoring thousands of deeply affordable and permanent supportive homes to ensure long-term affordability, operating stability, and expanded options for the county's most vulnerable residents.

SCCHA's progress has been supported by strong financial stewardship and disciplined management. The agency maintains healthy reserves and an AA- credit rating, reflecting prudent fiscal management, long-term planning, and innovation in meeting obligations while managing risk.

Since 2024, SCCHA has also renewed and recentered its focus on residents' well-being and affirmed an unwavering commitment to high-quality customer service. The agency created the Resident Impact Team to systematically assess resident needs, elevate resident feedback, and connect households to critical resources such as food security and wellness supports in partnership with community organizations. In FY 2027, SCCHA will engage partners to explore best practices and potential new approaches to supporting transition-aged youth while improving utilization and leveraging existing targeted resources.

Additionally, SCCHA launched its "Year of Customer Service," which has streamlined internal operations, reorganized specialized teams to support timely processing, deployed real-time reporting dashboards, expanded self-service tools through Monthly Application Info Sessions and Monthly Owner Office Hours. The team led a focused campaign to increase Rent Café enrollment, resulting in nearly 50 percent of families and 70 percent of owners now enrolled in the enhanced online portal system. SCCHA has also expanded staff training in trauma-informed care, empathic de-escalation, and community resource navigation, ensuring employees are better equipped to provide responsive, holistic support that aligns with residents' goals and overall well-being.

Building on this foundation, SCCHA has engaged residents, landlords, staff, Board members, public agencies, and community partners through surveys, focus groups and interviews to shape the 2026–2030 Strategic Plan. Community voices affirmed the agency's direction, underscoring the need to expand and preserve affordable housing at greater scale, continue to strengthen internal operations and staffing capacity, and suggested increased collaboration and partnerships and more intentionally focus on resident success, well-being, and long-term stability.

SCCHA's FY 2027 MTW Annual Plan continues the momentum of the past five years by focusing on program stability, and high-quality service delivery so that future MTW proposals can be fully aligned with the agency's updated strategic direction. This deliberate

and accountable approach, grounded in demonstrated results and informed by community engagement, is designed to support a more resident-centered, financially resilient, and locally driven housing system for Santa Clara County.

*Bracher Gardens Apartments*

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

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

## Mission and Goals

The Housing Authority is finalizing a refresh of the Strategic Plan, ensuring relevance of future of the Agency and our role in the local community. Our goals expanded from the previous Strategic Plan, including more accessible statements of innovation and relevance that are centered around residents. 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, operational excellence, and residents' success and opportunity. Below are the proposed goals of the Strategic Plan, set to be adopted by the Board prior to the end of FY2026, accompanied by SCCHA's actions to achieve the goals.

### Housing Stability, Availability, and Affordability

**Goal** Expand access to safe, healthy, affordable housing for low-income and extremely low-income households in Santa Clara County.

SCCHA will grow its portfolio through new development and strategic acquisitions in neighborhoods that meet resident needs, while preserving existing affordable homes to prevent displacement and protect long-term affordability across the county. The agency will deploy rental and housing assistance tools innovatively to support more families, seniors, and people with supportive housing needs, managing public resources responsibly to maximize long-term housing stability and community impact. SCCHA will use data and resident experience to target investments where

they have the greatest effect, align housing production and preservation with community priorities, and maintain the financial strength needed to expand housing opportunities.

### Partnerships

**Goal Collaborate with public, private, and community partners to expand impact and address housing challenges facing low-income households.**

SCCHA will strengthen relationships with local jurisdictions, developers, owners, service providers, and community-based organizations to expand and preserve affordable housing and broaden the reach of rental assistance. The agency will serve as a trusted public partner by advancing policy, testing innovations, and building support for housing as a cornerstone of vibrant, sustainable communities through research, engagement, and advocacy. SCCHA will communicate transparently and work with residents and people with lived experience to shape decisions, improve services, and reinforce shared accountability for resident stability, opportunity, and success.

### Operational Excellence

**Goal Build an innovative, sustainable, high-performing organization that delivers its mission effectively and responsively.**

SCCHA will enhance organizational capacity through staffing investments, leadership development, succession planning, and a workplace culture that supports collaboration, equity, and high performance. The agency will improve operational efficiency and customer service by streamlining processes, modernizing technology, and using data and lived experience to learn, adapt, and continuously improve how programs are designed and delivered. SCCHA will manage risk responsibly, diversify resources, and align capital and operating investments with strategic priorities to ensure long-term financial sustainability and strong governance.

### Resident Opportunity and Success

**Goal Support residents' stability, aspirations, and well-being through a resident-centered, equity-driven approach.**

Approximately 3,500 multi-family units throughout the County are owned and managed by the Housing Authority, with that number only set to increase in the next several years. The Housing Authority is deepening its role as both a long-term owner and producer of affordable housing, building on a robust pipeline of new developments and expanded preservation work across Santa Clara County. By investing in new construction, strategic acquisitions, and reinvestment in aging

properties, SCCHA will increase the total number of deeply affordable and supportive homes available to residents while protecting existing communities at risk of losing affordability.

### Financial Sustainability

**Goal Ensure long-term financial sustainability to support mission-driven growth and resilience.**

SCCHA will implement a comprehensive capital and financing strategy for its real estate portfolio, including refinancing opportunities, reserve policies, and reinvestment priorities linked to asset condition and community impact. The agency will diversify revenues by pursuing tools such as ground leases, developer and asset-management fees tied to SCCHA-sponsored projects, shared-equity or shared-appreciation structures where appropriate, and participation in local and regional housing funding initiatives (such as bonds or dedicated housing funds). SCCHA will also use flexible program authorities to design cost-effective subsidy and administrative models that maintain service levels during periods of federal funding volatility, while preserving strong reserves and AA-level credit to ensure the agency can continue to preserve and expand affordable housing.

## New Proposed Activities for FY2027

In FY2027 and beyond, the MTW Plan will more closely align with the strategic goals of the agency. Serving residents and prioritizing the needs of the local community will be the guiding focus of the proposed initiatives.

SCCHA is proposing one new activity in this plan while awaiting approval of two activities and two re-proposals from FY2026 Plan:

- 2027-1: Total Development Cost

### Pending Activities

- 2026-1: Shallow Subsidy Program
- 2026-2: Direct Rental Assistance Pilot
- 2012-4: Affordable Housing Preservation Fund for SCCHA- and Affiliate-Owned Properties (Re-proposal)
- 2017-2: Special Needs Direct Referral Program (Re-proposal)

Full details of the proposed FY2027 activity 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, 2010-3, 2010-5, 2012-1, 2012-5, 2013-1, 2014-1a, 2014-1b, 2014-2, 2014-3, 2015-1, 2016-1, 2018-1, 2020-5 and 2020-6 are not shown.

MTW Statutory Objectives				
ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #)	ACTIVITY	REDUCE COST & ACHIEVE GREATER COST EFFECTIVENES S IN FEDERAL EXPENDITURE S	PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY	INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES
2009-1 (amended in FY2016, FY2021 & FY2025)	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		
2010-4 (amended in FY2023)	Allocating Project-Based Vouchers to SCCHA-Owned Projects Without Competition	X		
2011-1	Streamlined Approval Process for Exception Payment Standard for Reasonable Accommodation – HCV			X

MTW Statutory Objectives				
ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #)	ACTIVITY	REDUCE COST & ACHIEVE GREATER COST EFFECTIVENES S IN FEDERAL EXPENDITURE S	PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY	INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES
2011-2 (amended in FY2021)	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
2014-4 (amended in FY2015 & FY2024)	Increased Tenant Contribution—Up to 35 Percent of Gross Income	X		
2015-2	Project-Based Voucher Inspection Self-Certification	X		
2015-3	Modify Elderly Definition for PBV			X
2016-2	Streamlining of PBV Selection Requirements	X		
2017-1	Phasing in the Subsidy Standard Change			X
2017-2	Special Needs Population Direct Referral Program			X
2017-3 (amended in FY2018, FY2019 & FY2024)	Landlord Initiatives			X
2017-4*	Setting the Payment Standards Above 110 Percent of HUD Fair Market Rents			X
2019-1* (amended in FY2022)	Graduation Bonus		X	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		
2020-1	Increase Percentage of Project based Vouchers (PBV)			X

MTW Statutory Objectives				
ACTIVITY # (PROPOSED PLAN YEAR + ACTIVITY #)	ACTIVITY	REDUCE COST & ACHIEVE GREATER COST EFFECTIVENES S IN FEDERAL EXPENDITURE S	PROVIDE INCENTIVES TO FAMILIES LEADING TOWARD ECONOMIC SELF- SUFFICIENCY	INCREASE HOUSING CHOICES FOR LOW- INCOME FAMILIES
2020-2 (amended in FY2024)	Interim Housing			X
2020-3	Over Housed/Under Housed Project Based Voucher (PBV) Households			X
2020-4	Rent to Owners & Rent Reasonableness			X
2021-1	Impose Limits on PBV to HCV Conversion	X		
2021-2	Simplify Minimum Rent Hardship Exemption	X		
2022-1* (amended in FY2025)	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		
2022-5	Utility Arrears Assistance	X		X
2023-2	Strive Scholarship		X	
2024-1*	Digital Inclusion		X	
2024-2*	Rental Assistance for Post-Secondary Education Students with Children		X	X
2024-3*	Short-Term Bridge Loan			X
2024-4	Streamline Offer of New Lease Process	X		
2024-5	Buena Vista Mobile Home Park			X
2025-1	Small Area Fair Market Rents			X
2025-2	Income Exclusions	X	X	
<b>Proposed in FY2026 Plan – Pending Approval</b>				
2026-1	Shallow Subsidy		X	
2026-2	Direct Rental Assistance			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+			Fully Accessible	Adaptable
None	0	0	0	0	0	None		0	0
None	0	0	0	0	0	None		0	0
None	0	0	0	0	0	None		0	0

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

\* The federal accessibility standard under HUD’s Section 504 regulation is the Uniform Federal Accessibility Standards (UFAS) for purposes of Section 504 compliance (24 CFR 8.32). HUD recipients may alternatively use the 2010 ADA Standards for Accessible Design under Title II of the ADA, except for certain specific identified provisions, as detailed in HUD’s Notice on “Instructions for use of alternative accessibility standard,” published in the Federal Register on May 23, 2014 (“Deeming Notice”) for purposes of Section 504 compliance, <https://www.govinfo.gov/content/pkg/FR-2014-05-23/pdf/2014-11844.pdf>

\*\* Select “Population Type” from: General, Elderly, Disabled, Elderly/Disabled, Other

If “Population Type” is “Other” please describe:

N/A

#### ii. Planned Public Housing Units to be Removed

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

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

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

**iii. Planned New Project Based Vouchers**

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

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	RAD?	DESCRIPTION OF PROJECT
1510 N. First St	57	No	Rehabilitation project with 58 total units. 40 PBVs for families, 17 PBVs for chronically homeless families.
245 Weddell	60	No	New construction project with 123 total units. 29 PBVs for families, 31 PBVs for chronically homeless families.
Clara Gardens	30	No	New construction project with 119 total units. 30 PBVs for chronically homeless families.
East Santa Clara Senior	20	No	New construction project with 63 total units. 20 PBVs for chronically homeless seniors.
Gateway Tower	65	No	New construction project with 220 total units. 65 PBVs for families.
Mountain View Lot 12	35	No	New construction project with 120 total units. 25 PBVs for large families, 10 PBVs for chronically homeless families.
Rincon de los Esteros	120	No	Existing project acquired by the Housing Authority. MTW PBVs will support 120 family units
Trillium	36	No	New construction project with 65 total units. 4 PBVs for families, 20 PBVs for chronically homeless families, 12 PBVs for special needs seniors.
Terra Bella	23	No	New construction project with 106 total units. 23 PBVs for families.
VTA Berryessa	49	No	New construction project with 193 total units. 49 PBVs for chronically homeless families.

**495** Planned Total Vouchers to be Newly Project-Based

**iv. 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 or HAP is already in place at the beginning of the Plan Year. Select one of the following to indicate the \*Planned status by the end of the Plan Year: ‘Committed,’ ‘leased,’ or ‘issued.’” In column three, 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
1860 Alum Rock Apartments	26	Leased/Issued	No	Family project with 60 total units. 26 PBVs for families.
2275 Ellena Dr	1	Leased/Issued	No	Family project with 4 total units. One PBV unit.
2287 Pasetta Dr	1	Leased/Issued	No	Family project with 4 total. One PBV unit.
3001 El Camino Real	42	Committed	No	Family project with 130 total units. 42 PBVs for families
961 Meridian	73	Leased/Issued	No	Family project with 233 total units. 38 PBVs for families, 35 HUD-VASH PBVs for veterans.
The Algarve	60	Leased/Issued	No	Family project with 91 total units. 36 PBVs for chronically homeless families, 24 HUD-VASH PBVs for veterans.
Agrihood Senior Apartments	54	Leased/Issued	No	Senior project with 165 total units. 54 PBVs for special needs seniors.
Alvarado Park	41	Leased/Issued	No	Senior project with 90 total units. 18 PBVs for seniors and 23 PBVs for special needs seniors.
Anne Way Residence	5	Leased/Issued	No	Senior project with 5 SRO units. PBV units are for seniors.
Arcade (formerly Kooser)	30	Leased/Issued	No	Family project with 191 total units. 30 PBVs for chronically homeless families
Bellarmino	53	Leased/Issued	No	Family project with 116 total units. 29 PBVs for families and 24 PBVs for chronically homeless families.
Blossom Hill Residence	5	Leased/Issued	No	Senior project with 5 SRO units. PBV units are for seniors.
Blossom Valley Senior Apartments	49	Leased/Issued	No	Senior project with 147 total units. 49 PBVs for chronically homeless seniors.
Bracher Senior Housing	5	Leased/Issued	No	Senior project with 71 total units. 5 HUD-VASH PBVs for senior veterans.
Calabazas	80	Leased/Issued	No	Family project with 136 units. 80 PBVs for chronically homeless families.
Carroll Inn	20	Leased/Issued	No	Family project with 121 total units. 20 PBVs for disabled persons.
Casa De Novo	27	Leased/Issued	No	Family project with 56 units. 27 PBVs for chronically homeless families.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Casa Feliz Studios	6	Leased/Issued	No	Family project with 60 total units. 6 PBVs for individuals with developmental disabilities.
Connell Apartments	5	Leased/Issued	No	Family project with 28 total units. 5 PBVs for families.
Corde Terra Senior Apartments	199	Leased/Issued	No	Senior project with 199 total units. PBV units are for seniors.
Corinthian House	6	Leased/Issued	No	Senior project with 102 total units. 6 PBVs for seniors.
Country Hills	37	Leased/Issued	No	Family project with 152 total units. 37 PBVs for families.
Crescent Terrace	20	Leased/Issued	No	Senior project with 48 total units. 20 PBVs for seniors.
Crest Avenue Apartments	4	Leased/Issued	Yes	RAD conversion of former Mod Rehab project with 50 total units. 4 PBVs for families.
Crossings on Monterey	20	Leased/Issued	No	Family project with 39 total units. 20 PBVs for chronically homeless families.
Curtner SRO's	6	Leased/Issued	No	Senior project with 6 SRO units. PBV units are for seniors.
Curtner Studios	15	Leased/Issued	No	Family project with 178 total units. 15 HUD VASH PBVs for veterans.
Cypress Gardens Senior Apartments	124	Leased/Issued	No	Senior project with 124 total units. PBV units are for seniors.
Dent Avenue Apartments	4	Leased/Issued	No	Family project with 24 total units. 4 PBVs for families.
Distel Circle	32	Leased/Issued	No	Family project with 90 total units. 1- PBVs for large families, 22 PBVs for chronically homeless families.
Donner Lofts – CHDR	20	Leased/Issued	No	Family project with 101 total units. 20 PBVs for chronically homeless families.
Eagle Park	41	Leased/Issued	No	Family project with 67 total units. 16 PBVs for the chronically homeless and those with special needs, 25 HUD-VASH PBVs for veterans.
Edwina Benner Plaza	23	Leased/Issued	No	Family project with 66 total units. 10 PBVs for families, 13 PBVs for those with special needs.
Eklund Gardens I Apartments	10	Leased/Issued	No	Family project with 10 total units. PBV units are for families.
Eklund Gardens II Apartments	6	Leased/Issued	No	Family project with 6 total units. PBV units are for families.
Emerson North	1	Leased/Issued	No	Family project with 6 total units. PBV unit is for families.
Emerson South	1	Leased/Issued	No	Family project with 6 total units. PBV unit is for families.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Fair Oaks Senior Plaza	93	Leased/Issued	No	Senior project with 124 total units. 93 PBVs for seniors.
Fairlands SRO's	5	Leased/Issued	No	Senior project with 5 SRO units. PBV units are for seniors.
Ferne	1	Leased/Issued	No	Family project with 16 total units. PBV unit is for families.
Fuji Towers	103	Leased/Issued	No	Senior project with 124 total units. 103 PBVs for seniors.
Gish Apartments	6	Leased/Issued	No	Family project with 35 total units. 6 PBVs for disabled families.
Hawthorn	47	Leased/Issued	No	New construction project with 103 total units. 26 PBVs for seniors, 21 PBVs for chronically homeless families.
Hillview	132	Leased/Issued	No	Project with 132 total units. 100 Mainstream PBVs for disabled persons, 32 PBVs for the chronically homeless.
Homestead SRO's	4	Leased/Issued	No	Senior project with 4 SRO units. PBV units are for seniors.
Iamesi Village (North San Pedro Apartments)	109	Leased/Issued	No	Family project with 135 total units. 60 PBVs for the chronically homeless and 49 HUD-VASH PBVs for veterans.
Immanuel-Sobrato	97	Leased/Issued	No	Project with 106 total units. 97 PBVs for chronically homeless families.
Ira D. Hall Square (formerly Sonora Court)	75	Leased/Issued	No	Family project with 176 total units. 30 PBVs for families, 45 PBVs for the chronically homeless.
Julian Gardens	9	Leased/Issued	No	Family project with 9 total units. PBV units are for families.
Kifer Senior	41	Leased/Issued	No	Senior project with 80 total units. 33 PBVs for those with special needs, 8 HUD-VASH PBVs for veterans.
Kings Crossing Apartments	25	Leased/Issued	No	Family project with 94 total units. 25 PBVs for chronically homeless families.
Klee/Offenbach SRO's	5	Leased/Issued	No	Senior project with 5 SRO units. PBV units are for seniors.
La Avenida	32	Leased/Issued	No	Family project with 100 total units. 7 PBVs for the chronically homeless, 25 HUD-VASH PBVs for veterans.
Laurel Grove Family Apartments	81	Leased/Issued	No	Family project with 82 total units. 61 PBVs for families, 20 PBVs for special needs and/or chronically homeless.
Leigh Avenue Senior Apartments	63	Leased/Issued	No	Senior project, 100% PBVs for chronically homeless seniors.
Lenzen Gardens Senior Apartments	93	Leased/Issued	No	Senior project with 94 total units. 93 PBVs for seniors.
Llewellyn Residence	5	Leased/Issued	No	Senior project with 5 SRO units. PBV units are for seniors.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Lucretia Gardens	16	Leased/Issued	No	Family project with 16 total units. PBV units are for families.
Lupina (formerly 797 Almaden)	35	Lease/Issued	No	Family project with 99 total units. 10 PBVs for large families, 25 PBVs for chronically homeless families.
Madrone (formerly 777 West San Carlos)	16	Leased/Issued	No	Family project with 154 total units. 16 PBVs for families.
Magnolias	23	Committed	No	Family project with 66 total units. 16 PBVs for chronically homeless, 7 HUD-VASH PBVs for veterans.
Mariposa Place (formerly 750 West San Carlos)	40	Leased/Issued	No	Family project with 80 total units. 40 PBVs for families at risk of homelessness.
Markham Plaza I (Tully Gardens)	40	Leased/Issued	No	Family project with 152 total units. 20 PBVs for chronically homeless families, 20 HUD-VASH PBVs for veterans.
Markham Plaza II	20	Leased/Issued	No	Family project with 152 total units. 20 HUD-VASH PBVs for veterans.
Maryce Freelen Place	18	Leased/Issued	No	Family project with 74 total units. 18 PBVs for families.
Meridian (formerly Sunnyvale Block 15)	22	Leased/Issued	No	Family project with 90 total units. 22 PBVs for families.
Mesa Terrace (formerly Gallup & Mesa)	23	Leased/Issued	No	Family project with 46 total units. 23 PBVs for the homeless and those with special needs.
Met South	10	Leased/Issued	No	Family and senior project with 31 total units. 10 PBVs for seniors and families.
Miramar Apartments	16	Leased/Issued	No	Family project with 16 total units. PBV units are for families.
Mitchell Park	25	Leased/Issued	No	Family project with 50 total units. 25 PBVs for families with special needs.
Monroe Street	8	Leased/Issued	No	Family project with 65 total units. 8 PBVs for families.
Monte Alban	33	Leased/Issued	No	Family project with 192 total units. 33 PBVs for families.
Montecito	39	Leased/Issued	No	Family project with 85 total units. 39 PBVs for families.
Monterey Gateway	37	Leased/Issued	No	Senior project with 75 total units. 37 PBVs for chronically homeless seniors.
Monticelli Apartments	23	Leased/Issued	No	Family and senior project with 52 total units. 14 PBVs for seniors, 9 PBVs for families.
Morrone Gardens	4	Leased/Issued	No	Senior project with 101 total units. 4 HUD-VASH PBVs for senior veterans.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Moulton Plaza	8	Leased/Issued	No	Family project with 66 total units. 8 PBVs for families.
Onizuka Crossing	19	Leased/Issued	No	Family project with 58 total units. 13 PBVs for chronically homeless families, 6 HUD-VASH PBVs for veterans.
Opportunity Center	55	Leased/Issued	No	Family project with 88 total units. 55 PBVs for chronically homeless families.
Orchard Ranch (Palomino)	18	Leased/Issued	No	Family project with 18 total units. 18 PBVs for large families, those with special needs, and chronically homeless families.
Orchard Ranch (Overo)	8	Leased/Issued	No	Family project with 8 total units. PBV units are for families at risk of homelessness.
Orchard Ranch (Tobiano)	14	Leased/Issued	No	Family project with 14 total units. PBVs units are for large families, families at risk of homelessness, and chronically homeless families.
Page Street	27	Leased/Issued	No	Family project with 81 total units. 27 PBVs for chronically homeless families.
Park Avenue Senior Apartments	99	Leased/Issued	No	Senior project with 99 total units. 79 PBVs for seniors, 20 PBVs for seniors with special needs.
Parkmoor Apartments	41	Leased/Issued	No	Family project with 81 total units. 21 PBVs for families, 20 PBVs for transition-aged youth.
Parkside Studios	7	Leased/Issued	No	Family project with 59 total units. 7 PBVs for chronically homeless families.
Parkview Senior Apartments	24	Leased/Issued	No	Senior project with 140 total units. 24 PBVs for seniors.
Pavilion Inn	21	Leased/Issued	No	Family project with 43 total units. 21 PBVs for families with special needs.
Poco Way Apartments	10	Leased/Issued	No	Family project with 130 total units. 10 PBVs for families.
Pollard SRO's	5	Leased/Issued	No	Senior project with 5 SRO units. PBV units are for seniors.
Quetzal Gardens	32	Leased/Issued	No	Family project with 70 total units. 4 PBVs for large families, 28 PBVs for chronically homeless families.
Renascent Place	160	Leased/Issued	No	Family project with 160 total units. PBV units are for chronically homeless families.
Rincon Gardens Senior Apartments	198	Leased/Issued	No	Senior project with 200 total units. 198 PBVs for seniors.
Roosevelt Park	20	Leased/Issued	No	Family project with 80 total units. 20 PBVs for families.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Royal Oak Village	22	Leased/Issued	No	Family project with 73 total units. 22 PBVs for large families.
San Antonio Place	30	Leased/Issued	No	Family project with 120 total units. 30 PBVs for families.
San Veron Park Apartments	6	Leased/Issued	No	Family project with 32 total units. 6 PBVs for families.
Sango Court	49	Leased/Issued	No	Family project with 101 total units. 2 PBVs for families, 40 PBVs for the chronically homeless, and 7 HUD-VASH PBVs for veterans.
Santa Familia	13	Leased/Issued	No	Family project with 79 total units. 13 PBVs for families.
Santa Teresa Multifamily	21	Leased/Issued	No	Family project with 50 total units. 21 PBVs for families.
Second Street Studios	134	Leased/Issued	No	Family project with 135 total units. 134 PBVs for chronically homeless families.
Shorebreeze	20	Leased/Issued	No	Family project with 61 total units. 20 PBVs for those at risk of homelessness.
Sobrato Apartments	38	Leased/Issued	No	Family project with 60 total units. 38 PBVs for chronically homeless families and families at risk of homelessness.
Solaire Apartments (formerly Auzerais)	64	Leased/Issued	No	Family project with 130 total units. 64 PBVs for homeless and those with special needs.
Stevenson House	10	Leased/Issued	No	Senior project with 120 total units. 10 PBVs for seniors.
Sunset Gardens Senior Apartments	74	Leased/Issued	No	Senior project with 75 total units. 74 PBVs for seniors.
Tamien Station	33	Leased/Issued	No	Family project with 134 total units. 33 PBVs for families.
The Charles	44	Leased/Issued	No	Family project with 99 total units. 44 PBVs for families.
The Fielden	65	Leased/Issued	No	Family project with 160 total units. 25 PBVs for families, 15 PBVs for chronically homeless, and 25 HUD-VASH PBVs for veterans.
The Heartwood Apartments	48	Leased/Issued	No	Family project with 49 total units. 48 PBVs for chronically homeless families, transition-aged youth, and those with special needs.
Timberwood Apartments	20	Leased/Issued	No	Family project with 286 total units. 20 PBVs for families.
Tyrella Gardens Apartments	11	Leased/Issued	No	Family project with 56 total units. 12 PBVs for families.
Vela Apartments (Alum Rock Family Housing)	29	Leased/Issued	No	Family project with 87 total units. 29 PBVs for chronically homeless families.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Ventura	1	Leased/Issued	No	Family project with 12 total units. One PBV is for families.
Ventura Apartments	1	Leased/Issued	No	Family project with 12 total units. One PBV is for families.
Veranda	6	Leased/Issued	No	Senior project with 19 total units. 6 PBVs for seniors with special needs.
Village at Willow Glen	20	Leased/Issued	No	Senior project with 133 total units. 20 PBVs for seniors.
Villas at Fourth Street	93	Leased/Issued	No	Senior project with 93 total units. PBV units are for chronically homeless seniors.
Villas on the Park	83	Leased/Issued	No	Family project with 83 total units. PBVs are for the chronically homeless.
Vitalia (formerly Bascom)	16	Leased/Issued	No	Family project with 79 total units. 11 PBVs for chronically homeless families and 5 HUD-VASH PBVs for veterans.
Waldo	3	Leased/Issued	No	Family project with 6 total units. 3 PBVs for families.
Westwood Ambassador	10	Leased/Issued	Yes	RAD conversion of former Mod Rehab project with 42 total units. 10 PBVs for families.
Wheeler Manor	10	Leased/Issued	No	Senior project with 111 total units. 10 PBVs for seniors.
Wolfe SRO's	4	Leased/Issued	No	Senior project with 4 SRO units. PBV units are for seniors.

**4,370**

**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 is working with HUD on a RAD conversion at 1510 N. First Street, with project specifics below.

**Project:** 1510 North First (ex-Comfort Suites hotel)

**Address:** 1510 N. First St, San Jose, CA 95112

**Number of Units:** 58 studios (including 1 2-Bedroom Managers unit)

**PBV's:** 57 units

**Funding:** City funding secured, County in progress, will apply for 9% Tax credits in April 2026

**Anticipated Construction closing:** November/December 2026

SCCHA is also exploring Faircloth to RAD conversions and may begin the process in FY2027. The properties under analysis are: Avenida Espana Gardens (84 senior units), Bracher Gardens Apartments (72 senior units), DeRose Gardens (76 senior units), El Parador Apartments (125 senior units), Girasol (59 senior units), Jardines Paloma Blanca (42 senior units) John Burns Gardens (100 senior units), Las Golondrinas (50 senior units), Morrone Gardens Apartments (102 senior units), Villa Hermosa (100 senior units).

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

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

**GENERAL DESCRIPTION OF ALL PLANNED CAPITAL EXPENDITURES DURING THE PLAN YEAR**

Construction will finish at the beginning of FY 27 at Hawthorn Senior Housing (103 units), the first phase of the East Santa Clara (ESC) Master Plan. The second phase, Trillium Senior Housing (65 units), and is projected to start construction shortly near the end of FY 26. Subsequent phases of the ESC Master Plan include Sage and Elderberry will use MTW funds for planning and pre-development work.

The Development team will start construction near the end of FY 26 for the rehabilitation of the Willows, a 47-unit family development ;construction is expected to be complete by the end of FY27. SCCHA expects to be awarded tax credits and start construction at two additional projects in FY 27, including the redevelopment of rehabilitation of Orchard Gardens (123 units) and the adaptive re-use of 1510 North 1<sup>st</sup> Street from a hotel into 58 permanent supportive housing units. Lastly construction will begin on infrastructure improvements at the Buena Vista Mobile Home Park.

Other projects will use MTW for predevelopment and due diligence activities, including Jardines rehabilitation, 8<sup>th</sup> and Alexander, VTA Hostetter, the Sunnyvale Project, The Mountain View Project, the Campbell Project, 10 Kirk, and the North First Street Master Plan, which are still in early stages of conceptual planning.

Several projects are on the list for upcoming preservation activities. The list includes Avenida Espana, Bracher, DeRose, John burns, Klamath, Morrone, Pinmore, San Pedro Gardens, Villa Hermos, and Blossom River.

**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**
Public Housing Units Leased	48	4
Housing Choice Vouchers (HCV) Utilized***	242,340	20,195
Local, Non-Traditional: Tenant-Based^	1,464	122
Local, Non-Traditional: Property-Based^	11,928	994
Local, Non-Traditional: Homeownership^	0	0
<b>Planned Total Households Served</b>	<b>255,780</b>	<b>21,315</b>

\* “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.

\*\*\* “Housing Choice Vouchers (HCV) Utilized” includes all SPVs within the MTW PHA’s portfolio

^ 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

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED*
Tenant-Based	Interim Housing - Activity 2020-2	1,464	122
Property-Based	Create Affordable Housing Preservation Fund for SCCHA and Affiliate-Owned Properties/Activity 2012-4	11,928	994
Homeownership	N/A	0	0

\* The sum of the figures provided should match the totals provided for each local, non-traditional category in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category, if applicable.

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

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

HOUSING PROGRAM	DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS
MTW Public Housing	None
MTW Housing Choice Voucher	The Santa Clara County rental market continues to have a low vacancy rate, which leads to difficulties in leasing Housing Choice Vouchers. HCV holders who are looking for housing continue to face extremely high rents and a competitive rental environment. The Housing Authority implemented Small Area FMRs in January 2025 and will monitor effects in the coming year. The Development team has a robust pipeline to expand affordable housing supply. Project-Based Vouchers continue to be instrumental in affordable housing production within the County. Approximately 457 MTW PBV units are anticipated to complete construction in FY2026.
Local, Non-Traditional	None

**iii. Unique Households Served (Optional)**

Number of unique households served annually through local, non-traditional rental services program such as short-term rental assistance, rapid rehousing, emergency housing, etc.

UNIQUE HOUSEHOLDS SERVED
The Interim Housing Activity, 2020-2, serves the community by providing housing to project-based voucher holders who are waiting for units to finish construction. Most of these voucher holders are chronically homeless and getting them into units helps establish case management relationships early in the process. The numbers above reflect the 122 units that are being used as interim housing under this activity. The number of households actually served is much greater than the 122 reflected above. Unit turnover is more frequent than annual, but difficult to predict, and results in the number of families served being as high as 1,464, if all units turned over monthly.

**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 (indicating whether the waiting list is site-based or agency-wide for public housing) 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: Tenant-Based	Program Specific*	49,540*	Closed	No
Federal MTW: Site-Based List	Site Based		Partially Open	Yes
Project-Based, Local, Non-Traditional MTW Housing Assistance Program	Site Based	2,400	Partially Open	Yes

\* 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 14 properties where households are assisted through Project-Based, Local, Non-Traditional MTW Housing Assistance Programs. Buena Vista Mobile Home Park does not have a waitlist. There may be duplication of applicants among the remaining lists as applicants can put their name on as many lists as are open. Site based lists exist at: El Parador, Bendorf Drive, Blossom River, Clarendon, DeRose Garden, Ford Road Plaza, Helzer Courts, Morrone Gardens, Pinmore Gardens, San Pedro Gardens, Rincon de los Esteros, Alvarado and Bellarmino.

**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	SCCHA anticipates closing the tenant-based interest list, which will result in fewer waiting lists being created. The site-based interest lists will be opened and closed to maintain a significant number of applicants and ensure vacant units are filled as quickly as possible.

### III. Proposed MTW Activities (HUD Approval Requested)

This section describes the MTW activity that SCCHA proposes to implement in FY2027.

#### 2027-1: ALTERNATIVE TOTAL DEVELOPMENT COST CALCULATION Activity)

*(Proposed*

SCCHA is proposing an alternative to HUD’s Total Development Cost Calculation for redevelopment and rehabilitation activities under local, non-traditional MTW authority. This alternative cost calculation will allow for a more accurate reflection of affordable development costs and support SCCHA’s continued role as a regional leader in providing affordable housing.

Development costs in Santa Clara County for all types of housing are among the most expensive in the country due to high costs of labor, materials, and land. Despite the enormous demand for new housing, these elevated costs have created major challenges for providing new housing supply; in fact, a 2024 study from the City of San Jose found that construction of high-density market-rate housing was “not financially viable” in the current economic environment. These factors have contributed to San Jose being considered among the least affordable cities in the world.

SCCHA makes every effort to limit development costs through extensive design management, value engineering, negotiation with contractors, and partnerships with public owners to secure free land. Nevertheless, the San Jose cost study found that affordable housing developments in the City averaged \$763,889 per unit as of 2025, a 15% increase over 2024’s per-unit average. These elevated costs have been paired with growth in interest rates and a reduction in local and State funding, making SCCHA’s MTW funds an essential source to move projects forward.

Affordable housing in Santa Clara County and the State of California is highly competitive. The California Tax Credit Allocation Committee (CTCAC), which allocates Federal low-income housing tax credits for the State, evaluates projects based on leveraged outside sources, which means those projects with substantial commitments, such as MTW funds, are best positioned to win awards.

CTCAC publishes annual Threshold Basis Limits, or the maximum eligible basis that a project may claim low-income tax credits against. These basis limits establish costs based on the CTCAC region and are a combination of estimated and actual construction costs of new construction projects that have received tax credits within the previous five-year period. The CTCAC data set includes some projects that achieve lower average construction costs by avoiding local, State, and Federal sources that trigger prevailing wages (and also provide less affordability). However, these cost numbers are still significantly more accurate than the HUD TDC numbers for the costs of affordable housing projects in Santa Clara County.

An increase in SCCHA’s TDC limit to match the CTCAC annual Threshold Basis Limits would benefit the local affordable housing community by having MTW funds that better meet project needs and move projects forward more quickly to tax credit application and construction. Increasing the limit could also allow SCCHA to contribute some MTW funds on a temporary basis (for example, by serving as cash collateral), which could lower the cost of permanent debt and ultimately reduce the total amount of MTW funds that would be needed as a permanent source. CTCAC updates its basis limits each year, creating a clear mechanism for SCCHA to make annual changes that reflect up-to-date cost information in the County. If this activity is approved, SCCHA will update the TDC annually upon publication of the CTCAC Basis Limits.

Below are the 2025 Basis Limits for Santa Clara County, which will serve as SCCHA’s TDC limits, if approved.

<b>SRO &amp; STUDIO</b>	<b>1 BEDROOM</b>	<b>2 BEDROOM</b>	<b>3 BEDROOM</b>	<b>4 BEDROOM</b>
\$523,060	\$613,460	\$740,000	\$947,200	\$1,055,240

Contrastingly, HUD’s TDC Limits for Santa Clara County are:

<b>SRO &amp; STUDIO</b>		<b>1 BEDROOM</b>		<b>2 BEDROOM</b>		<b>3 BEDROOM</b>		<b>4 BEDROOM</b>	
<b>HCC</b>	<b>TDC</b>	<b>HCC</b>	<b>TDC</b>	<b>HCC</b>	<b>TDC</b>	<b>HCC</b>	<b>TDC</b>	<b>HCC</b>	<b>TDC</b>
\$137,888	\$220,621	\$193,044	\$308,870	\$248,199	\$397,118	\$330,932	\$529,491	\$413,665	\$661,864

### Relation to Statutory Objectives

This activity supports the statutory objective of expanding participants’ housing choices.

### Anticipated Schedule for Achieving the Stated Objectives

SCCHA anticipates implementing this activity upon approval and using the flexibility as necessary.

### 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.

### Cost Implications

SCCHA anticipates that the proposed activity will be cost neutral as the MTW funds invested in development will be returned to SCCHA during the life of the project, though a combination of sources, including fees and rental income.

### Authorization for the Activity

The proposed activity is authorized in Attachment C, Paragraph D, Section 1, Subsection e. of

SCCHA's MTW Agreement with HUD and waives certain provisions of Section 8(o)(13)(B) of the 1937 Act and 24 CFR 983 as necessary to implement SCCHA's MTW Plan. This authorization is needed to waive 24 CFR 905.314(b) & (c)

### **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 FY2027 MTW Annual Plan. SCCHA will obtain approval from its Board of Commissioners prior to the activity's implementation. The impact of this activity will be evaluated annually in SCCHA's MTW Report.

## IV. Approved MTW Activities (HUD Approval Previously Granted)

To date, SCCHA has had 67 activities approved by HUD. Of these, seventeen were closed out in previous years.

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

### Implemented Activities

#### ACTIVITY 2009-1: REDUCED FREQUENCY OF TENANT REEXAMINATIONS

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2009 AMENDED: FY2016, FY2021, FY2025

#### DESCRIPTION OF MTW ACTIVITY

This activity allows SCCHA to reduce the frequency of reexaminations of family income and composition from annually to once every three years for households with only fixed income sources and once every two years for all other households. Changes to the activity since initial implementation:

- FY2016: Amended to include SCCHA's four remaining public housing units under the activity.
- FY2020: Technical amendment that reduced the reexamination frequency to 4 years for households with only fixed income sources and 3 years for all other households. This amendment was extended in FY2021 until end of FY2023, after which SCCHA reverted back to the original two-/three-year reexamination cycle.
- FY2025: Amended to waive certain interim reexamination requirements expected from the implementation of the Housing Opportunity Through Modernization Act (HOTMA). SCCHA will only process interim increases in income in the following cases:
  - To include the income of a family member being added to the household;
  - When a zero-income family reports an increase in income;
  - To include previously uncounted income during an interim reexamination that would otherwise make the family zero-income;
  - If a family that is in a repayment agreement with SCCHA reports an increase in income;
  - If the participant requests an interim reexamination for increases in their income;
 All other income increases will be processed at the next regularly scheduled reexamination. SCCHA will continue to process interim reexaminations for any income decreases.

#### UPDATE ON MTW ACTIVITY

SCCHA continues to use this activity.

#### PLANNED NON-SIGNIFICANT CHANGES

When there is an increase in the payment standard amount during the HAP contract term, SCCHA will use the increased payment standard amount at the earliest of the family's next regular or interim

reexamination, or an approved increase in the gross rent that would result in an increase in the family share. This ensures the application of payment standard increases is consistent with the biennial and triennial reexamination cycles.

**PLANNED SIGNIFICANT CHANGES**

SCCHA does not anticipate any significant changes to this activity.

**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 FY2027.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

SCCHA plans to close out this activity and combine it with 2017-2 (currently re-proposed and pending HUD approval of the FY2026 MTW Plan).

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

SCCHA continues to use this activity.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

SCCHA plans to close out this activity in the FY2026 MTW Report as it no longer requires MTW authority to utilize the TIC form for income verification. Recently implemented HOTMA provisions now allow PHAs to use other programs’ determination of income.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

In 1976, SCCHA signed an agreement to administer the Housing Choice Voucher program on behalf of the City of San José. This agreement allows SCCHA to operate under one Annual Plan, one Administrative Plan, and one combined MTW plan for both housing authorities. In accordance with this agreement, 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.

In FY2021, SCCHA launched a combined interest list for both the City of San José and the County of Santa Clara and continues to operate this joint interest list for the Housing Choice Voucher (HCV) and the Project Based Voucher (PBV) Programs.

**UPDATE ON MTW ACTIVITY**

SCCHA continues to use this activity to operate a combined interest list.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2009-14: PAYMENT STANDARD CHANGES BETWEEN REGULAR REEXAMINATIONS**

PLAN YEAR APPROVED: FY2009 IMPLEMENTED: FY2010 AMENDED: FY2014

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

SCCHA does not calculate or include income received from family assets when total family assets are less than \$50,000. Since implementation in FY2010, SCCHA has reduced administrative costs through this activity.

**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.

### PLANNED SIGNIFICANT CHANGES

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

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

PLAN YEAR APPROVED: FY2010   IMPLEMENTED: FY2010   AMENDED: FY2023

### 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.

In FY2023, SCCHA amended the activity to allow SCCHA to enter into a HAP contract for new construction or rehabilitation if site work was performed without an Agreement to Enter into HAP (AHAP) contract in place. This enables SCCHA to perform work necessary to render the site safe and ready for vertical construction or rehabilitation once financing is obtained.

Prior to HAP contract execution, the owner must confirm that any work from the date of proposal submission or (for non-competitive selection) board approval of the PBV award complies with the non-waivable requirements included in the AHAP. Specifically, the owner must confirm the following for any work that preceded HAP contract execution:

- Applicable prevailing wages were paid for the work that preceded HAP contract execution
- No work began prior to completion of an environmental review pursuant to 24 CFR Parts 50 or 58 and a Request for Release of Funds (RROF) was received by HUD
- All applicable fair housing and civil rights requirements were followed
- The project’s design complies with any applicable provisions of Section 504 of the Rehabilitation Act, 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.

### UPDATE ON MTW ACTIVITY

SCCHA awarded PBVs to a Housing Authority-owned project, Hawthorn and plans to self-award in FY2026 and following years, for the projects at the East Santa Clara site. The Housing Authority will also use this activity as opportunities are available.

### PLANNED NON-SIGNIFICANT CHANGES

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

SCCHA plans to close out this activity in the FY2026 MTW Report. Recent regulatory changes now allow all PHAs to approve an exception payment standard up to 120 percent of the applicable FMR/SAFMR as a reasonable accommodation. Therefore, this activity is no longer necessary.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

PLAN YEAR APPROVED: FY2011 IMPLEMENTED: FY2011 AMENDED: FY2021

**DESCRIPTION OF MTW ACTIVITY**

This activity waives the HUD requirement that a designated independent agency conduct Housing Quality Standards (HQS) inspections and rent reasonableness determinations for SCCHA-owned units. It also waives the requirement for the independent agency to submit copies of each HQS 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. SCCHA conducts the following tasks in-house:

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

The elimination of third-party requirements significantly streamlines the leasing process for SCCHA-owned units and reduces administrative costs.

### UPDATE ON MTW ACTIVITY

SCCHA continues to use this activity.

### PLANNED NON-SIGNIFICANT CHANGES

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

### PLANNED SIGNIFICANT CHANGES

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

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

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

### DESCRIPTION OF MTW ACTIVITY

The purpose of the activity is to enhance the occupancy stability in the PBV program, 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.

### PLANNED NON-SIGNIFICANT CHANGES

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

### PLANNED SIGNIFICANT CHANGES

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

Construction is underway at Hawthorn Senior Housing (103 units), the first phase of the East Santa Clara (ESC) Master Plan. In FY2027, SCCHA expects to complete construction at Hawthorn and begin construction on phase two, Trillium Senior Housing (65 units). Subsequent phases of the ESC Master Plan, Sage and Elderberry, will use MTW funds for planning and pre-development work.

Other projects will use MTW for predevelopment and due diligence activities, including Jardines rehabilitation, 8<sup>th</sup> and Alexander, VTA Hostetter, the Sunnyvale Project, The Mountain View Project, the Campbell Project, 10 Kirk, and the North First Street Master Plan, which are still in early stages of conceptual planning.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

SCCHA continues to use this activity to preserve the long-term stability and viability of existing SCCHA owned and affiliate owned housing. Construction for the rehabilitation of the Willows (47 units) is expected to start by the end of FY2026 and be completed before the end of FY2027. In FY2027, SCCHA also plans to begin work on redevelopment of Orchard Gardens (123 units), adaptive re-use of 1510 North 1<sup>st</sup> Street hotel into 58 permanent supportive housing units, and infrastructure improvements at Buena Vista Mobile Home Park. SCCHA will also use MTW funds for predevelopment and due diligence activities for rehabilitations at Jardines Paloma Blanca, Girasol, Los Golondrinas.

Several projects are on the list for upcoming preservation activities. The list includes Avenida Espana, Bracher, DeRose, John burns, Klamath, Morrone, Pinmore, San Pedro Gardens, Villa Hermos, and Blossom River. Additional projects potentially using MTW funds are Iamesi, Leigh Avenue, Fourth Street, Japantown, Roosevelt, Murphy Ranch I and II, Gish and 1585 Studios.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

This activity 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 cost savings to SCCHA and the simplified calculation freed up staff hours by streamlining this task. In FY2024 the range was updated to between 28 and 35 percent of the family’s gross monthly income.

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

This activity was approved and implemented in FY2015 and allows Project-Based Voucher owners and tenants to self-certify the correction of reported Housing Quality Standards (HQS) deficiencies within the

30-day period after the initial HQS inspection. This activity only applies to HQS deficiencies which are not life threatening. This activity reduces expenditures by eliminating the need to schedule and conduct a re-inspection.

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**ACTIVITY 2015-3: MODIFIED ELDERLY DEFINITION FOR PBV**

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

**DESCRIPTION OF MTW ACTIVITY**

HUD currently defines elderly as people 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 applies to the PBV program and modifies the age at which a person or family is considered elderly from d 62 to 55 or older to align with the definition used by several affordable housing developments in the area. Therefore, PBV sites which define elderly as 55 years of age and older are considered an elderly property.

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**ACTIVITY 2016-2: STREAMLINING OF PBV SELECTION REQUIREMENTS**

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

**DESCRIPTION OF MTW ACTIVITY**

This activity enables 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.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**ACTIVITY 2017-1: PHASING IN THE SUBSIDY STANDARD CHANGE**

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

**DESCRIPTION OF MTW ACTIVITY**

This activity allows 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.

**PLANNED SIGNIFICANT CHANGES**

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

**ACTIVITY 2017-2: SPECIAL NEEDS POPULATION DIRECT REFERRAL PROGRAM (& RE-PROPOSED)**

PLAN YEAR APPROVED: FY2017 IMPLEMENTED: FY2019 AMENDED: 2025

**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**

Pending HUD approval of the FY26 MTW Plan, this activity will be combined with 2009-5.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**ACTIVITY 2017-3: LANDLORD INITIATIVES**

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

**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. As approved, 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 expanded 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.

An update to the activity in FY2024 expanded the initiatives to include a landlord assurance fund which reimburses property owners for certain HCV tenant-caused physical damage costs, beyond normal wear and tear that exceed the security deposit amount, up to \$2,500.

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**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

PLAN YEAR APPROVED: FY2017 IMPLEMENTED: FY2025

**DESCRIPTION OF MTW ACTIVITY**

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.

**UPDATE ON MTW ACTIVITY**

SCCHA implemented this activity in FY2026.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

This activity modifies certain aspects of the Family Self Sufficiency (FSS) program 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 prior to enrollment for families which are not on fixed incomes. Second, the activity allows the successful maintained employment of any adult member of the enrolled family – rather than just the Head of Household – to count towards the family’s FSS goals. As long as at least one adult family member completes the Individual Training and Services Plan, the family will be considered a “successful FSS completion” and will receive the escrow payout.

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

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

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

**DESCRIPTION OF MTW ACTIVITY**

Section IV –MTW Activities | Implemented

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.

**PLANNED SIGNIFICANT CHANGES**

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

**2019-4: STREAMLINING THE LEASE UP PROCESS**

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

**DESCRIPTION OF MTW ACTIVITY**

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

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

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2020-1: PBV PROGRAM CAP**

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

**DESCRIPTION OF MTW ACTIVITY**

This activity was approved in FY2020 and raises the percentage cap for the Housing Authority of the City of San José (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.

**PLANNED SIGNIFICANT CHANGES**

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

**2020-2: INTERIM HOUSING**

PLAN YEAR APPROVED: FY2020 IMPLEMENTED: FY2020 AMENDED: FY2024

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

SCCHA’s partnership with Santa Clara County on the Pedro Street Interim Housing site continues. In accordance with the FY2024 activity update to expand this activity to partners other than the County, SCCHA has entered into a partnership with the City of San Jose for an interim housing site at Pacific motor Inn. A similar partnership with the City of San Jose is planned for the Arena Hotel, another interim housing site.

All interim housing sites under this activity receive payment for referrals from the Community Queue and are in compliance with HQS requirements.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2020-3: OVER HOUSED/UNDER HOUSED PBV HOUSEHOLDS**

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2020-4: RENT TO OWNERS & RENT REASONABLENESS**

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

**DESCRIPTION OF MTW ACTIVITY**

HUD regulations require that during an assisted tenancy, the rent paid to owner 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.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2021-1: IMPOSE LIMITS ON PBV TO HCV CONVERSION**

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

### DESCRIPTION OF MTW ACTIVITY

This activity waives the requirement that PBV tenants 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

SCCHA continues to use this activity.

### PLANNED NON-SIGNIFICANT CHANGES

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

### PLANNED SIGNIFICANT CHANGES

There are no planned significant changes to this activity.

## 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 continues to use this activity.

### PLANNED NON-SIGNIFICANT CHANGES

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

### PLANNED SIGNIFICANT CHANGES

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

**2022-3: MAINSTREAM TURNOVER VOUCHER ISSUANCE FLEXIBILITY**

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

**DESCRIPTION OF MTW ACTIVITY**

This activity waives the PIH Notice 2020-01 requirements to issue turnover vouchers to 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**

SCCHA continues to use this activity.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2022-5: UTILITY ARREARS ASSISTANCE**

PLAN YEAR APPROVED: FY2022 IMPLEMENTED: FY2023 AMENDED: N/A

**DESCRIPTION OF MTW ACTIVITY**

This activity authorizes the use of housing assistance payments to provide one-time utility arrears assistance to HCV participants with past-due utility bills, with the goal to prevent utility disconnection due to nonpayment and allow families to retain their housing assistance in their current unit. SCCHA set aside \$500,000 to provide utility arrears assistance under this activity.

**UPDATE ON MTW ACTIVITY**

SCCHA continues to use this activity.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2023-2: STRIVE SCHOLARSHIP**

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

**DESCRIPTION OF MTW ACTIVITY**

The Strive Scholarship is an important part of SCCHA’s Section 8 Program. The annual scholarships are awarded as unrestricted funds which can be used to offset the cost of tuition, fees, books, high-speed internet, transportation, groceries, or any other student-identified need. SCCHA allocates up to \$75,000 per year, which is divided among eligible applicants. The Housing Authority will supplement with non-MTW funds for awardees who are residents of an affiliate property or those who would otherwise not be eligible for an MTW award.

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

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

**UPDATE ON MTW ACTIVITY**

SCCHA continues to use this activity.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2024-4: STREAMLINE OFFER OF NEW LEASE PROCESS**

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

SCCA continues to use this activity.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2024-5: BUENA VISTA MOBILE HOME PARK**

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

**DESCRIPTION OF MTW ACTIVITY**

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

**UPDATE ON MTW ACTIVITY**

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

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2025-1: SMALL AREA FAIR MARKET RENTS**

PLAN YEAR APPROVED: FY2025 IMPLEMENTED: FY2025 AMENDED: N/A

**DESCRIPTION OF MTW ACTIVITY**

SCCHA modified the Small Area Fair Market Rent(SAFMR) Rules to allow flexibility to set payment standards above 110% in certain zip codes to mitigate involuntary displacement. SCCHA may consider multiple factors, including but not limited to: Disparity between SAFMR and actual rents based on third-party market reports and HCV program data; The number of families that would be negatively impacted by a reduction in payment standards; Disparate impacts by race/ethnicity or family types; Alignment with city/county strategies targeting areas for anti-displacement or revitalization efforts. This flexibility allows SCCHA to expand affordable housing and preserve affordability in lower cost communities.

**UPDATE ON MTW ACTIVITY**

SCCHA implemented the activity upon HUD’s approval of the FY2025 Plan.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

**2025-2: INCOME EXCLUSIONS**

PLAN YEAR APPROVED: FY2025 IMPLEMENTED: FY2026 AMENDED: N/A

**DESCRIPTION OF MTW ACTIVITY**

This activity authorizes additional income exclusions that differ from HUD regulations in order to support family self-sufficiency and reduce administrative burden for staff and families in reporting and calculating income from these sources. The following types of income are excluded:

- The full amount of student financial assistance
- The full amount of full-time student earned income and adoption assistance payments
- Payments from pilot guaranteed basic income (GBI) programs with discrete beginning and end dates

**UPDATE ON MTW ACTIVITY**

SCCHA implemented this activity in FY2026.

**PLANNED NON-SIGNIFICANT CHANGES**

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

**PLANNED SIGNIFICANT CHANGES**

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

## Activities Not Yet Implemented

### 2019-1: GRADUATION BONUS

PLAN YEAR APPROVED: FY2019

PLAN YEAR AMENDED: FY2022

This activity, repropose 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 repropose 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.

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

PLAN YEAR AMENDED: FY2025

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.

This activity was amended in FY2025 due to recent HUD regulations and guidance on HOTMA Section 104's asset limitation provision:

- SCCHA will use HUD's definition of net family assets in 24 CFR 5.603 to determine the value of assets that count towards the asset limitation.
- SCCHA will align with HUD regulations when determining whether a property is exempt from this requirement.
- SCCHA is expanding this activity to apply to Public Housing units.
- SCCHA will exempt the following groups from the asset limitation: residents of units converting to Section 8 PBRA or PBV through the Rental Assistance Demonstration (RAD); residents that are given Public Housing or Section 8 assistance due to other property acquisition, redevelopment, or conversion activities.

SCCHA plans to implement this activity when SCCHA implements HOTMA Section 104 as directed by HUD.

**2022-2: WAIVE FULL-TIME STUDENT INCOME EXCLUSION FOR FAMILIES EARNING 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 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.

**2024-1: DIGITAL INCLUSION**

PLAN YEAR APPROVED: FY2024

To address the well-documented gap or “digital divide” separating low-income households from access to technology and broadband internet, the Housing Authority implemented a pilot program with a local partner to provide devices and training to community members who are

at 80% AMI or below. The pilot includes 500 tablets to be distributed to community members at digital literacy workshops.

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

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

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

PLAN YEAR APPROVED: FY2024

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

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

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

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

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

**2024-3: SHORT TERM BRIDGE LOAN**

PLAN YEAR APPROVED: FY2024

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

Full repayment of the principal of the short-term loans is intended to be made prior to occupancy of the completed project but may be extended to no later than the end of the period of affordability at the sole discretion of the Housing Authority. Interest accrued on all loans will be deferred and due no later than the end of the period of affordability. The land

use restriction will terminate upon payment of both principal and interest. Once repaid, funds will be used for an MTW eligible purpose.

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

There are no activities on hold.

## Closed Out Activities

ACTIVITY	WHY THE ACTIVITY WAS CLOSED	YEAR CLOSED
<p><b>2009-3</b> 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 <b>FY2015</b></p>
<p><b>2009-4</b> 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 <b>FY2012</b></p>
<p><b>2009-6</b> 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 <b>FY2009</b></p>
<p><b>2009-7</b> 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 <b>FY2009</b></p>
<p><b>2009-10</b> 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 <b>FY2015</b></p>
<p><b>2009-12</b> 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 <b>FY2009</b></p>

ACTIVITY	WHY THE ACTIVITY WAS CLOSED	YEAR CLOSED
<b>2010-1</b> Eliminating 100% Excluded Income from the Income Calculation Process	With the publication of PIH Notice 2013-4, issued January 28, 2013, the verification and calculation of 100% excluded income is no longer required. Therefore, SCCHA eliminated this activity in FY2013. This activity saved labor time and costs.	This activity was closed out in <b>FY2013</b>
<b>2010-3</b> Applying Current Increased Payment Standards at Interim Reexaminations	This activity is no longer needed because HOTMA requires that payment standard increases be applied by the family's first regular or interim reexamination.	This activity was closed out in <b>FY2025</b>
<b>2010-5</b> Assisting Over-Income Families Residing at SCCHA-owned Project-Based Voucher Properties	This activity waived preference requirements for in-place families at disposed public housing sites to allow for continued tax credits and tax-exempt bonds. Due to the HOTMA implementation notice issued February 2, 2024, this activity was no longer needed and closed out.	This activity was closed out in <b>FY2024</b>
<b>2012-1</b> Create Standard Utility Allowance Schedule	SCCHA utilizes MTW Activity 2014-4, which simplifies the rent calculation method and eliminates utility allowances. Because of Activity 2014-4, MTW Activity 2012-1 is no longer necessary and was closed out prior to implementation.	This activity was closed out in <b>FY2013</b>
<b>2012-5</b> Expand Tenant Services at SCCHA Owned or Affiliate Properties	Tenant services can be expanded with single fund flexibility and this activity is no longer needed.	This activity was closed out in <b>FY2023</b>
<b>2013-1</b> Elimination of the Earned Income Disallowance (EID) Calculation	This activity is no longer needed because EID has been phased out under HOTMA.	This activity was closed out in <b>FY2025</b>
<b>2014-1a &amp; 2014-1b</b> Focus Forward Program (and amendments)	After reviewing the outcomes of time-limited voucher programs, SCCHA determined this pilot program did not meet the needs of the local community and close it out prior to implementation.	This activity was closed out in <b>FY2022</b>
<b>2014-2</b> Eliminate Requirement to Re-Determine Rent Reasonableness when HUD decreased Fair Market Rent	This activity was closed out prior to being implemented because HUD regulations made this activity moot.	This activity was closed out in <b>FY2022</b>
<b>2014-3</b> Freeze on Contract Rent Increases	This activity no longer serves the needs of our local community.	This activity was closed out in <b>FY2023</b>

ACTIVITY	WHY THE ACTIVITY WAS CLOSED	YEAR CLOSED
<p><b>2015-1</b> 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 <b>FY2015</b></p>
<p><b>2016-1</b> Restriction on Head of Household Changes</p>	<p>This activity was intended to be implemented when the Focus Forward Program (Activity 2014-1a/1b) was implemented. Activity 2014 1a/1b was not implemented and was closed in FY2022.</p>	<p>This activity was closed out in <b>FY2022</b></p>
<p><b>2018-1</b> Strengthening Partnerships through Capacity Building</p>	<p>This activity was intended to be implemented when the Focus Forward Program (Activity 2014-1a/1b) was implemented. Activity 2014 1a/1b was not implemented and was closed in FY2022.</p>	<p>This activity was closed out in <b>FY2022</b></p>
<p><b>2020-5</b> Eliminate the 40% of Income Cap at Initial Leasing</p>	<p>Implemented during the COVID-19 pandemic to provide more housing options in a volatile rental market. Closed out at the request of a community partner as the threshold of 40% was too burdensome for families.</p>	<p>This activity was closed out in <b>FY2021</b></p>
<p><b>2020-6</b> 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 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 <b>FY2021</b></p>

## V. Planned Application of MTW Funds

The information reported in Section V. serves as a placeholder until the FY2027 budget is approved by the SCCHA Board of Commissioners. At the time the FY2027 budget is approved (June 2026) SCCHA will update Section V. and re-submit the Plan to HUD.

### A. PLANNED APPLICATION OF MTW FUNDS

#### i. Estimated Sources of MTW Funds

FDS LINE ITEM NUMBER	FDS LINE ITEM NAME	DOLLAR AMOUNT
70500 (70300+70400)	Total Tenant Revenue	\$23,580
70600	HUD PHA Operating Grants	\$475,001,844
70610	Capital Grants	\$617,466
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	\$0
71100+72000	Interest Income	\$432,797
71600	Gain or Loss on Sale of Capital Assets	\$0
71200+71300+71310+71400+71500	Other Income	\$243,528
<b>70000</b>	<b>Total Revenue</b>	<b>\$476,319,215</b>

#### Note 1: Source in Analysis

**70600-HUD PHA Operating Grants \$475,001,844:**

This FDS line represents the sum of the following: (1) Public Housing Operating Subsidy Income \$19,636 and (2) Section 8 MTW Admin Fee & HAP Earned \$474,982,208.

**71200+71300+71310+71400+71500 - Other Income \$243,528**

This FDS line represents the sum of the following: (1) Land lease \$50,000, (2) Interest income-Ground lease \$2,376 (3) Fraud recovery \$190,552 and (4) Other miscellaneous income \$500.

**ii. Estimated Application of MTW Funds**

<b>FDS LINE ITEM NUMBER</b>	<b>FDS LINE ITEM NAME</b>	<b>DOLLAR AMOUNT</b>
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating - Administrative	<b>\$24,021,854</b>
91300+91310+92000	Management Fee Expense	<b>\$0</b>
91810	Allocated Overhead	<b>\$0</b>
92500 (92100+92200+92300+92400)	Total Tenant Services	<b>\$223,542</b>
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	<b>\$18,065</b>
93500+93700	Labor	<b>\$0</b>
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	<b>\$54,046</b>
95000 (95100+95200+95300+95500)	Total Protective Services	<b>\$26,870</b>
96100 (96110+96120+96130+96140)	Total Insurance Premiums	<b>\$351,053</b>
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	<b>\$70,677</b>
96700 (96710+96720+96730)	Total Interest Expense & Amortization Cost	<b>\$38,900</b>
97100+97200	Total Extraordinary Maintenance	<b>\$0</b>
97300+97350	HAP + HAP Portability-In	<b>\$416,773,542</b>
97400	Depreciation Expense	<b>\$326,186</b>
97500+97600+97700+97800	All Other Expense	<b>\$0</b>
<b>90000</b>	<b>Total Expenses</b>	<b>\$441,904,734</b>

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

We will use the Fiscal Year 2024, net reserve balance of \$34,414,481 to fund the following:

**I-Activity 2012-3-Acquisition & Development Funds - \$26.76M:**

SCCHA anticipates using (1) \$3.2M to subsidize the development of the East Santa Clara Street Projects and the Sage Family Apartments; (2) \$6.6M for the Pavilion Inn rehabilitation, (3) \$16.34M for the Surestay projects and adjacent parcels EZ-8 to redevelop replacement housing.

**II-Activity 2012-3-Acquisition & Development Funds - \$617K:**

SCCHA anticipates using \$617K from the Public Housing Capital Grant as an additional source to fund the construction and development costs of the Bellarmino Place Apartments.

**III- Activity 2012-4-Preservation Funds - \$6.4M:**

SCCHA anticipates using (1) \$4.5M to rehabilitate and redevelop the Buena Vista Mobile Home Park, (2) \$1.9M to preserve and rehabilitate three HUD acquisition properties: Girasol Apartments, Jardines Paloma Blanca Apartments, and Las Golondrinas Apartments.

**IV- Activity 2020-2-Interim Housing - \$2.8M:**

SCCHA is partnering with the City of San Jose and the County of Santa Clara to provide interim (short-term) housing to special needs populations.

**Note 2 - Source Out Analysis**

**91000 - Total Operating - Administrative \$24,021,854:**

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- \$223,542:**

This FDS line is consisted of \$3K resident programs and \$220K for other admin contract-tenant services.

**96100-Total Insurance Premiums - \$351,053:**

This FDS line is consisted of \$68K liability insurance, \$179K worker's compensation insurance and \$104K for other insurance.

**96000 - Total Other General Expenses - \$70,677:**

This FDS line is comprised of (1) \$69K admin fee port out, and (2) \$1K payment In Lieu of Taxes.

**97300+97350 - Housing Assistance Payments + HAP Portability-In \$416,773,542:**

This FDS line represents the total HAP paid out \$417M.

HAP Portability -It is not budgeted in FY2020 as HACSC is absorbing all future incoming portability.

**iii. Description of Planned Application 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.

SCCHA plans to use MTW Single Fund Flexibility to supplement RAD rents, beginning in FY2027

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

Original Funding Source	Beginning of FY - Unspent Balances	Planned Application of PHA Unspent Funds during FY
HCV HAP*	\$158,803,994	\$158,803,994
HCV Admin Fee		
PH Operating Subsidy		
<b>TOTAL:</b>	<b>\$158,803,994</b>	<b>\$158,803,994</b>

Description of Planned Expenditures of Unspent Operating Fund and HCV Funding	
One-Time Board Approved Project	MTW Activity No.
Bellarmino Place LP - Predevelopment Loan	2012-3
East Santa Clara - Predevelopment Activity	2012-3
Bayberry Apartments LP - Predevelopment Loan	2012-3
Primrose Apartments LP - Predevelopment Loan	2012-3
Sage Apartments LP - Predevelopment Loan	2012-3
Poco Way HDC (Buena Vista Mobile Home Park) - Predevelopment Loan	2012-4
San Pedro Gardens - Rehabilitation Project	2012-4
HomeKey Project (Residence Inn)	2012-3
Pavilion Inn - HomeKey Project	2012-3
HUD Properties Acquisition: Girasol Acquisition LP, Jardines Paloma Blanca Acquisition LP, and Las Golondrinas Acquisition LP	2012-4
Denny's Acquisition - Surestay Project (resident building)	2012-3
EZ-8 Acquisition - Surestay Project (redevelopment of housing for Surestay)	2012-3
Surestay Projects - Predevelopment Due Diligence Activity	2012-3
Short-Term Pilot Loan Program	2012-3
California Employers' Pension Prefunding Trust (CEPPT) Contributions	
Pedro Street Interim Housing Rental Subsidy Payment	2020-2
HAP Shortfall Contingency	

**B. LOCAL ASSET MANAGEMENT PLAN**

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

**C. RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION**

**i. Description of RAD Participation**

RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION
N/A

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

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

N/A

**VI. Administrative**

**A. BOARD RESOLUTION ADOPTING THE FY2027 ANNUAL MTW PLAN AND CERTIFICATIONS OF COMPLIANCE**

The SCCHA Board Resolution adopting the FY2027 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 FY2027 ANNUAL MTW PLAN**

SCCHA’s FY2027 MTW Annual Plan was made available for public review from March 2 through April 1. The public hearing for the plan was held on March 12.

**E. PLANNED AND ONGOING EVALUATIONS OF SCCHA’S MTW DEMONSTRATION**

In FY2027, 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 planning a full-scale study and evaluation of its MTW activities.

**Public Comments**

Individual or Organization	Comment	SCCHA Response

**Appendix One: Resolution No. 23-17**



## Appendix Two: Certifications of Payments (HUD 50071)

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