

Appendix C. Fifth Cycle Review

The City of San José's Fifth Cycle Housing Element was adopted by City Council on January 27, 2015 and included a Regional Housing Needs Allocation (RHNA) of 35,080 total units of housing and an Implementation Work Plan that included over 80 planned programs, policies, and activities. As described in further detail below, the City exceeded Fifth Cycle goals for market-rate housing and met or exceeded almost all Work Plan items. While the City did not meet RNHA goals for affordable housing, the City has developed new local funding sources for affordable housing development which should aid in meeting future goals. In addition, the City met substantially all of its applicable work plan goals.

RHNA Goals

At the completion of the Fifth Cycle, the City had met 115% of its market-rate housing goal but only 26% of its combined affordable housing goals.

Table C-1: Performance towards Fifth Cycle RHNA Goals

Category	5 th Cycle RHNA Goals	Building Permits Issued	% of Allocation
TOTAL Affordable Units	20,849	5,519	26%
• VLI & ELI	9,233	2,282	25%
• Low	5,428	620	11%
• Moderate	6,188	2,617	42%
Market Rate	14,231	16,379	115%
TOTAL Units	35,080	21,898	62%

Generally, per Table C-2, below, San José's progress towards its affordable housing RHNA goals is consistent with and exceeds the reported performance of jurisdictions across the greater Bay Area and the State of California.

Table C-2: Overview of Statewide Progress towards Fifth Cycle RHNA Goals

Jurisdiction	% of Affordable Housing RHNA Attained
City of San José	26%
Santa Clara County, all jurisdictions (including San José)	22%
Association of Bay Area Governments, all jurisdictions (including San José)	20%
State of California	21%

Lack of progress on affordable housing goals in the Fifth Cycle generally reflects the time and difficulty in assembling the multiple, competitive layers of affordable housing financing, as well as the scarcity of local, state, and federal subsidies that are needed to produce covenanted affordable housing. As an example, over the Fifth Cycle period, there were only enough Low-Income Housing Tax Credits to meet approximately 14% of California’s aggregate affordable housing needs.

The City of San José has attempted to address the scarcity of affordable housing through raising additional local funds. A recent, notable success was 2020’s Measure E, a voter approved real property transfer tax that will provide an additional estimated \$40-\$50 million annually for affordable housing development, preservation, and related supportive services in San José.

2014-2023 Implementation Work Plan

Per Table 3-2 below, the City completed almost all (83 of 85 items, or 98%) of its planned programs, policies, and activities from the Fifth Cycle Housing Element. These items were accomplished despite a pandemic that required multiple pivots, pulling staff away from regular work and into emergency management (especially in terms of addressing the constantly evolving context around eviction moratoria and provision of emergency rental assistance) and that continues to have ongoing repercussions in terms of the City's staff turnover and the difficulty of filling open staff positions.

Table C-3: Status of Fifth Cycle Work Plan Items

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
1. Continue Predevelopment Loan and Project Development Loan Programs.	A. Review City's existing Income Allocation Policy and update as necessary to provide a funding framework for income categories.	Completed. In fall 2020, the City Council approved the Housing Department's FY 20/21 to FY 22/23 Affordable Housing Investment Plan which defined funding priorities. Priorities for this plan include creation of new permanent supportive apartments for the homeless, non-homeless units in mixed-population projects, and traditional tax credit projects.	Remove.
1. Continue Predevelopment Loan and Project Development Loan Programs.	B. Continue to provide predevelopment loans to assist nonprofit housing developers with funds necessary to explore feasibility of proposed affordable multifamily housing.	Completed. The Housing Department provided about \$5 million in predevelopment funds that supported the construction of 715 affordable homes.	Revise.
1. Continue Predevelopment Loan and Project Development Loan Programs.	C. Continue to provide land acquisition, construction, and permanent financing for the development of new affordable homes and the acquisition/rehabilitation of existing rental housing for affordable homes pending availability of funds.	Completed. The City was an active partner with affordable housing developers during this RHNA period and provided over \$244 million in acquisition, construction, and permanent loans and grants to fund the new construction of about 2,650 affordable apartments. The City also issued \$648 million in tax exempt bonds to support rehabilitation and refinancing of over 2,100 existing affordable apartments.	Retain.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
2. Maximize revenues from the City's loan portfolio.	Maximize City revenues and residual receipts when senior loans mature or are refinanced/restructured.	Completed. While residual receipts have varied year after year, organizational capacity and analytical tools to monitor and enhance portfolio revenues have continued to grow with the addition of new staff and systems.	Retain.
3. Facilitate affordable housing deals that require no City subsidies.	Facilitate mixed income deals. Facilitate 9% and 4% tax credit/bond developments.	Completed. The City continued to engage with affordable housing developers, financial institutions, and other stakeholders with the goal of updating the bonds policy to increase the supply of affordable housing in San José. The City filed comments with the Credit Allocation Committee (TCAC) in late 2020 on proposed revisions to the State scoring framework that affects allocation of 4% credits and bonds. The City is working with developers to make sure current policies support mixed-income deals. In 2021, City staff continued to explore an option to use Joint Powers Authority (JPA)-issued bonds for low- and moderate-income housing. Staff is also coordinating with developers who do not require City subsidy.	Retain.
4. Implement the City's Housing Impact Fee Program.	A. Develop and implement the Housing Impact Fee Program by the effective date.	Completed. Implementation of the Affordable Housing Impact Fee (AHIF) Program was successful. Staff conducted over 27 stakeholder meetings to prepare and educate developers and other stakeholders on the requirements of the AHIF Program.	Remove.

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4. Implement the City's Housing Impact Fee Program.	B. Utilize the fees generated to finance the development of housing that is affordable to the workforce.	Completed. AHIF implementation is currently underway, per 4.A., above. In the past five fiscal years, AHIF has resulted in the collection of \$12 million to fund affordable housing. However, because of San José's successful defense of our Inclusionary Housing Ordinance (IHO, see Item #6., below), the IHO has superseded AHIF for buildings 20 units and above.	Revise.
5. Acquire land for residential development, especially near transit for the development of low- and moderate-income housing.	A. Utilize resources to acquire land	Completed. From 2015 to 2020, the City Housing Department approved commitments of over \$50 million and completed acquisition of sites that will eventually lead to the creation of an estimated 1,150 affordable apartments.	Retain or Revise.
5. Acquire land for residential development, especially near transit for the development of low- and moderate-income housing.	B. Partner with transit agencies such as Valley Transit Authority (VTA) and Bay Area Rapid Transit (BART) to explore and facilitate transit-oriented development (See workplan item #15)	Completed. The City has partnered with transit agencies and developers to bring affordable housing in Transit Oriented Developments (TOD) in close proximity to major transit stops. To date, over 300 units of affordable housing have been completed through these partnerships, with another 1,000 plus units approved (including approximately 600 units of affordable housing).	Retain.
5. Acquire land for residential development, especially near transit for the development of low- and moderate-income housing.	C. Explore the creation of a land bank to ensure the creation of affordable housing within Urban Villages.	Completed. Land banking as a central, concerted strategy at scale was deemed infeasible due to high costs of land. However, the Housing Department evaluates specific land acquisition opportunities individually as they arise. Staff continues to explore community land trusts as a potential vehicle to acquire and hold sites for affordable housing.	Remove.

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5. Acquire land for residential development, especially near transit for the development of low- and moderate-income housing.	D. Explore partnerships such as Community Land Trusts to facilitate acquisition of land.	Completed. The City's Housing Department has supported the startup of the South Bay Community Land Trust (SBCLT) through direct technical assistance and support in accessing other training and capacity building resources. The City continues to maintain regular contact with the SBCLT about other capacity-building opportunities and forthcoming preservation Notice of Funding Availability (NOFAs).	Revise.
6. Advance Inclusionary Housing Programs	Continue to defend the Citywide inclusionary housing ordinance in court. Continue to implement the City's existing inclusionary housing policy on for-sale projects in former redevelopment areas.	Completed. The City has successfully defended its Citywide inclusionary housing ordinance (IHO), including review by the US Supreme Court. The IHO is now fully implemented, applying to both for-sale and rental developments.	Revise.
7. Increase supply of permanent supportive housing for homeless individuals.	Explore all opportunities to create homeless apartments with supportive services within the City.	Completed. The City is committed to exploring all opportunities to create homeless apartments with supportive services. The City, County and Housing Authority meet regularly to coordinate investments and progress. Between 2015 and 2022, the City committed funding for 1,320 apartments with supportive services for homeless individuals.	Revise.
8. Preserve existing deed-restricted multifamily rental homes.	A. Develop a funding framework to guide the allocation of resources between the production of new affordable homes or the preservation of existing affordable homes.	Completed. Since 2020, the City has budgeted over \$30 million of Measure E funds for acquisition and rehabilitation of existing low-cost housing.	Revise.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
8. Preserve existing deed-restricted multifamily rental homes.	B. Fund the extension of the affordability restrictions for existing multifamily affordable homes pending funding availability.	Completed. Since 2016, Staff has extended and strengthened affordability restrictions of over 2,130 apartments without additional City funding.	Retain.
8. Preserve existing deed-restricted multifamily rental homes.	D. Explore and establish an outreach and tenant education program.	Completed/Ongoing. For projects in the portfolio for which an extension of affordability restrictions cannot be negotiated, the City works with borrowers to ensure that a satisfactory transition plan for existing residents is implemented. This is pursued on a case-by-case basis.	Revise.
9. Continue parkland fee reduction for new affordable housing development.	Continue to charge affordable housing developers a lower rate under the Parkland Dedication Ordinance (PDO) and Park Impact Fee (PIO) for new affordable housing developments.	Completed. The Housing Department regularly works with affordable housing developers to ensure that they receive the PDO-PIO fee reduction on their developments. The City Council approved an extension of the 50% reduction in park fees for 100% Area Median Income (AMI) affordable housing units to January 1, 2026. This change is consistent with proposed changes to the Inclusionary Housing Ordinance.	Retain.
10. Shape national, state, regional and local programs, policies and regulations to facilitate affordable housing development.	A. Help shape the National Housing Trust Fund, Government-Sponsored Enterprise reform, tax reform and other Federal policies that create funding for affordable housing development.	Completed. The Housing Department helps shape Federal policies that create funding for affordable housing by maintaining dedicated staff who monitor the federal legislative session. The City regularly provides comments and support letters for federal housing programs. More recently, during the pandemic, the City supported rental housing assistance, landlord assistance, remote public meetings, and federal HUD waivers concerning the use of federal funds to cope with the COVID crisis.	Retain.

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10. Shape national, state, regional and local programs, policies and regulations to facilitate affordable housing development.	C. Shape permanent source to replace lost state bond funding that was depleted.	Completed. Staff provided input to industry advocates that informed the formula for SB 2 (The Building Homes and Jobs Act) that was successfully passed as part of the Housing Legislation package in 2017. The new law uses a CDBG-based funding formula for the funding that was directed to local governments starting in 2019. This is consistent with the City's input.	Remove.
10. Shape national, state, regional and local programs, policies and regulations to facilitate affordable housing development.	D. Support new tools that replace Redevelopment Agency Low/Moderate Income Housing Funds including Infrastructure Financing Districts.	Completed. The City regularly monitors legislative activity, tracks and takes support positions on State bills that would increase resources for affordable housing.	Retain.

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<p>11. Advance collaborative solutions to address housing needs.</p>	<p>Work collaboratively with other City departments, local jurisdictions and working groups such as the Santa Clara CDBG Grants Management Group, Regional Housing Working Group, ABAG/MTC's One Bay Area Plan, Regional Prosperity Plan, Santa Clara Association of Planning Officials, and other initiatives.</p>	<p>Completed. The City recognizes and prioritizes collaborative efforts with the County, other local jurisdictions, non-profits and other organizations. Most recently, the partnerships built as a result of these efforts have played a pivotal role in devising a response to the COVID crisis. The Countywide CDBG Grants Management group became an important forum for sharing information across communities during this stressful time. The City's Housing Director meets quarterly with Housing Directors from Oakland and San Francisco. Staff also continued to interface with many regionally-focused housing organizations including Destination: Home, VTA Land Use and Transportation Initiatives Working Group, Non-Profit Housing Association (NPH) Legislative Committee, SV@Home, Santa Clara County Office of Supportive Housing, Santa Clara County Housing Authority, the Cities Association of Santa Clara County, the League of California Cities, Working Partnerships, the County Office of Education, and the Law Foundation of Silicon Valley. Housing and Planning staff meet regularly with technical assistance providers through the Santa Clara Association of Planning Officials.</p>	<p>Retain.</p>

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12. Advance regional solutions to address housing needs.	A. Explore creation of regional body or formal collaboration to make more efficient use of limited resources, maximize the delivery of affordable housing, or respond to homelessness.	Completed. The Bay Area Housing Finance Authority (BAHFA), established by legislation (AB 1487) in 2020, will offer a powerful new set of financing and policy tools to promote housing affordability and address the region's housing crisis. BAHFA aims to develop a comprehensive regional strategy for helping local governments tackle the housing crisis on a larger scale by transcending city and county boundaries. The Housing Department's Director serves on the BAHFA technical advisory committee to advocate for a role in facilitating housing production and preservation funding, as well as tenant protection strategies such as regional implementation of tenant preferences. Staff coordinates with BAHFA staff on preservation strategies as well as a regional effort to create affordable housing application portal called Doorway.	Revise.
12. Advance regional solutions to address housing needs.	B. Explore strategies to facilitate a more balanced regional distribution of affordable housing production.	Completed. The City continues to advocate for a balanced regional distribution of affordable housing through its membership in BAHFA. The City also supports the concept of a regional commercial linkage fee and it will continue to advocate for this at BAHFA.	Revise.

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13. Coordinate and implement housing policies and goals contained in the City's housing plans.	Develop a Housing Element, Consolidated Plan and 5-Year Investment Plan with goals and measurable actions that are consistent with each other.	Completed. The State-mandated Housing Element for 2014-23 was certified by HCD in April 2015, and federal Consolidated Plan for 2020-25 was submitted in August 2020. The most recent Housing Investment Plan for 20/21 - 22/23 was approved by City Council in November 2020 and explains how the City will use its resources (including new funding sources from Measure E and commercial linkage fee for affordable housing developments) to stretch toward the City Council's goal of 10,000 affordable units by 2023. The City is in the process of developing the next Housing Element for 2023-31. Both the Consolidated Plan and the Housing Investment Plan documents will heavily inform and influence the creation of goals for this Sixth Cycle Housing Element.	Retain.

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14. Coordinate with Valley Transportation Authority (VTA) on transit-oriented development activities.	Explore ways to facilitate transit-oriented affordable housing development near BART, Light Rail, and Bus Rapid Transit (BRT) stations, including identification of opportunities to develop parcels owned by either agency with affordable housing.	Completed. Housing staff continue to monitor VTA's intentions to lease and sell land near light rail stations. In 2016 VTA adopted their Joint Development policy, which included a 20% affordable housing inclusionary development policy. City staff and VTA continue to work collaboratively to further the development of affordable housing. Examples of collaborative activities include: <ul style="list-style-type: none"> • By 2016, VTA had submitted seven "signature project" concept plans to the Planning Department for consideration under the Urban Village planning framework. • In 2018, City staff worked actively with VTA and the identified developer for the Tamien Station affordable housing project, including on a successful AHSC application. • The City funded affordable units at Quetzal Gardens, a 100% affordable housing development adjacent to the 522 Bus Rapid Transit stop. 	Retain.
15. Develop and Implement Urban Village Plans	A. Explore various funding mechanisms and programs to help finance infrastructure and amenities for Urban Villages.	Completed. During this fifth cycle Housing Element, the City prepared financing plans for West San Carlos, South Bascom, The Alameda, Roosevelt Park, Little Portugal, Five Wounds, and 24th & William Urban Village Plans. However, state law changes made implementation financing plans infeasible.	Revise or Remove.

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15. Develop and Implement Urban Village Plans	B. Complete and/or implement Urban Village plans for The Alameda, West San Carlos, South Bascom, and Diridon Station.	Completed. The Diridon Station Urban Village Plan was completed and adopted by the City Council in June 2014. The Alameda Urban Village Plan was completed and adopted by the City Council in December 2016. The West San Carlos and the South Bascom Urban Village plans were adopted in May 2018. An amended Diridon Station Area Plan was adopted in May 2021.	Remove.
15. Develop and Implement Urban Village Plans	C. Develop and implement additional Horizon 1 and other Horizon Urban Village Plans as appropriate.	Completed. In 2018, the City Council adopted Urban Village Plans for South Bascom, West San Carlos, and East Santa Clara Urban Villages. The City Council also approved shifting North 1st St., Race St. Light Rail, Southwest Expressway, Alum Rock Ave., Stevens Creek Blvd., Santana Row/Valley Fair, Winchester Blvd., and South Bascom Ave. (North) Urban Villages from Horizons 2 and 3 into Horizon 1. In 2021, City approved the removal of all horizons.	Retain.

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15. Develop and Implement Urban Village Plans	D. Annually and as part of the Four Year Review of the General Plan evaluate the Urban Village Strategy and modify the Strategy as appropriate and needed, to facilitate its successful implementation, and to evaluate and address constraints.	Completed. In 2016, the City completed its first Four-Year Major Review of the General Plan. Changes included adopting a goal that 25% of new housing in Urban Villages be affordable, allowing affordable housing to move forward ahead of market rate housing in Urban Villages, and allowing selected 1.5-acre commercial sites outside of Urban Villages to convert to mixed-use affordable housing. In 2018, the City updated the criteria for affordable housing projects on selected 1.5-acre commercial sites outside of Urban Villages to be less restrictive. City Council finished approvals of the second Four-Year Review of the General Plan in December 2021, which included modifications to urban village strategies to better facilitate development in these areas including removing commercial space requirements for all 100% affordable housing.	Retain or Revise.
16. Maximize the City's competitiveness for external infrastructure funding to create complete, high quality living environments.	Continue to explore new funding sources for parks, transportation, and other types of infrastructure that favor cities with a demonstrated commitment to building affordable housing. Such programs include One Bay Area Grant, Cap and Trade and other regional, state, and Federal programs.	Completed. Since 2011, the City has been awarded over \$100 million in State loans and grants to plan and build parks, transportation infrastructure, affordable housing and more.	Retain.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
17. Work with the private sector to help facilitate the development of affordable homes.	A. Adopt City-wide density bonus ordinance in compliance with updated State law offering specific incentives and concessions to encourage the construction of affordable homes while remaining sufficiently flexible to respond to market conditions across the City.	Completed. The City Council approved a citywide Density Bonus Ordinance in May 2018 to implement State housing density bonuses and incentives law and to provide affordable housing incentives consistent with the San José General Plan. In May 2020, the Ordinance was updated to reflect the changes to the density bonus, incentives or concessions, and parking requirements made by AB 1763.	Revise.
17. Work with the private sector to help facilitate the development of affordable homes.	B. Continue to negotiate developer agreements in exchange for "extraordinary benefits" including affordable housing.	Completed. Most notably, the City worked with stakeholders and Google on a development agreement for the Diridon station area. As part of the Diridon Station Area Plan and the associated Downtown West Mixed-Use Plan and the Diridon Affordable Housing Implementation Plan (approved by City Council in May 2021), there is an extensive community benefits plan, including 25% of all new housing units (up to 12,900 new units based on potential development sites) in the Diridon Station Area to be restricted affordable.	Revise or Remove.

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18. Protect mobile home parks as a source of naturally affordable housing.	Explore the efficacy of the existing mobile home conversion requirements and potential updates/responses in order to protect an appropriate supply of mobile homes.	Completed. Zoning Code amendments, and a new City Council Policy to enhance protection of existing mobile home park residents were approved by Council in February 2016. In 2017, the City Council approved General Plan text amendments to enhance goals and policies to protect mobile home parks. In 2018, the Council approved additional General Plan text amendments related to housing preservation and rehabilitation. In 2020, the Council approved changing the land use designations of two mobilehome parks and directed staff to work on changing the designations of all remaining mobilehome parks and further amending the General Plan to ensure that residents receive just compensation in the event of a park conversion.	Revise.
19. Facilitate the increase of the supply of legal secondary units.	A. Consider amending the existing secondary unit ordinance to facilitate a larger supply of compact "naturally affordable" homes.	Completed. The City has made necessary amendments to the second unit ordinance to bring it in compliance with recent state legislation.	Revise.

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19. Facilitate the increase of the supply of legal secondary units.	B. Develop and provide informational materials to inform homeowners of the development standards and the process for secondary unit approval and construction.	Completed. The City has created a new Accessory Dwelling Unit (ADU) webpage (with the following URL: www.sanjoseca.gov/ADUs) to make it easy for residents to get information about ADUs. Existing materials have been updated or replaced with new informational materials to reflect changes to inform homeowners of the development standards and the process for secondary unit approval and construction. The City's ADU Ally staff has continued to hold webinars, educate the public and instruct them on how to use tools like the ADU checklist. The City has published a list of preapproved ADU designs to help applicants and to increase production.	Revise.
20. Continue to ensure that existing redevelopment-assisted housing remains in compliance with long-term restrictions on rents and tenant incomes.	Continue to monitor redevelopment assisted homes for compliance with restrictions and other regulations.	Completed. The City currently monitors approximately 15,466 units of affordable housing for compliance with affordability restrictions. System capacity to measure non-compliance corrections has been developed and implemented to allow more effective and efficient compliance monitoring.	Retain.
21. Continue to update the City's Zoning Code to facilitate housing at urban densities.	A. Evaluate and revise as appropriate Zoning Code to reduce parking ratios for Emergency Shelters, such as from 1 space for every 4 residents to 1 space for every 10 residents.	Completed. Revisions to the Zoning Code were made in 2016 for parking ratios for Emergency Shelters to allow up to 100% reduction with approval of a Development Permit.	Revise or Remove.

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21. Continue to update the City's Zoning Code to facilitate housing at urban densities.	B. Evaluate and modify existing or develop new Zoning Code to set appropriate parking ratios for developments in transit-rich or in urban/infill locations.	Completed. The City has eliminated minimum parking requirements for new construction in the City. Revisions to the Zoning Code were made for Secondary Dwelling/Accessory Dwelling unit requirements to ease and clarify parking requirements for ADUs, including up to 100% reduction in cases where there is proximity to transit or car-sharing in urban/infill locations.	Revise or Remove.
22. Assess development application and review process. Consider improvements as needed	Conduct an annual Customer Satisfaction Survey Study to measure satisfaction and to provide insight into how services can be improved.	Completed. The Planning Department conducts annual customer satisfaction surveys to help inform and improve the services that it offers to residents. Based on customer feedback received, staff has revised the Planning, Building and Code Enforcement Department's webpage, simplified applications, and expanded public information hours to make services more user-friendly.	Retain.
23. Facilitate the development of Single Room Occupancy (SRO) buildings.	Modernize development standards for Single Room Occupancy (SRO) housing.	Not completed. Work went on hold due to staffing turnover and shortages. Demand for use of the City's SRO muni vofr to entitle new affordable housing including social services plans lessened.	Remove.
24. Minimize the impacts of condo-conversions on households.	A. Assess the rate of apartment to condominium conversions and impacts on the rental housing stock to determine if displacement is an issue.	Completed. Staff assessment is that very few condo conversions are occurring in our market at this time, thus displacement due to condo conversions is not a high priority issue.	Remove.
24. Minimize the impacts of condo-conversions on households.	B. If displacement is identified as an issue, explore and establish policies and programs as appropriate to mitigate the potential impact on renters in the event of a condo-conversion.	NA. Displacement due to condo-conversion was identified as a lower priority issue.	Revise.

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25. Design, fund, and evaluate outreach, rapid rehousing, and supportive service programs for homeless individuals and families.	Continue to fund various nonprofit agencies that provide services to people who are homeless or at risk of becoming homeless. Funding includes but is not limited to programs geared toward preventing and ending homelessness, programs that permanently house homeless households with case management, one-time purchase of capital needs and equipment.	Completed. Homelessness has always been a high priority issue in San José. The pandemic has highlighted this issue even more. During the fifth cycle, the City has invested over \$167 million in agencies that provide housing-based solutions to the homeless, including homeless prevention, rental subsidies, interim housing, and supportive services, as well as crisis response interventions, including homeless outreach, emergency shelter, safe parking, motel vouchers. We offer basic needs such as meals, hygiene and employment development activities. Through the Coronavirus Aid, Relief, and Economic Security (CARES) Act, the City received additional federal and State funding. These funds allowed for additional or new resources for financial assistance, rental subsidies, interim housing, congregate shelter, outreach, hygiene resources, encampment waste management, and moteling for people at high risk of COVID-19.	Retain.
26. Implement master-lease program to provide transitional housing for homeless people in existing under-occupied hotels.	A. Revise Zoning Code to allow Hotel Supportive Housing as an incidental use to commercial hotels in non-residential zoning districts.	Completed. In 2014, the City revised Zoning Code to allow hotel supportive housing as an incidental use to commercial hotels in non-residential zoning districts.	Remove.

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<p>26. Implement master-lease program to provide transitional housing for homeless people in existing under-occupied hotels.</p>	<p>B. Seek funding to begin implementation.</p>	<p>Completed. The City has been actively exploring the conversion of under-occupied hotels to provide transitional housing for the homeless since 2015. The first project was completed in 2016. A second project was purchased in 2019. A third project was purchased in 2021 using the State's HomeKey program and the City has applied for funding for three additional purchases.</p>	<p>Revise.</p>
<p>27. Engage in regional homeless coordination, planning efforts, and other initiatives with external partner agencies.</p>	<p>A. In cooperation with the County Destination: Home, and other community partners prepare and implement the new Community Plan to End Homelessness in Santa Clara County that focuses both on chronic homelessness as well as family and youth homelessness.</p>	<p>Completed. In August 2020, the City Council endorsed the 2020-2025 Santa Clara County Community Plan to End Homelessness. The Plan contains three focus areas: 1) Address the root causes of homelessness through system and policy change; 2) Expand homelessness prevention and housing programs to meet the need; and 3) Improve the quality of life for unsheltered individuals and create healthy neighborhoods for all. The five-year Community Plan is a County-wide roadmap guiding government, private sector, nonprofit organizations, and other community members as they make decisions about funding, priorities, and needs. In coordination with the County, Destination: Home and community partners, the City implemented the plan in 2021 by leading the planning and development of the third focus area. In 2021, the City made significant advancements to the goals outlined in the plan. For example, adding 346 new beds of interim housing and expanding the homelessness prevention system to reduce the annual inflow of people becoming homeless.</p>	<p>Revise.</p>

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<p>27. Engage in regional homeless coordination, planning efforts, and other initiatives with external partner agencies.</p>	<p>B. Continue work with the County - as the Continuum of Care (COC) applicant - to develop and implement new community-wide standards to ensure compliance for funding associated with the Federal HEARTH Act.</p>	<p>Completed. All service contracts from the City included community-wide standards and metrics as adopted by the COC and tracked in the Countywide Homeless Management Information System HMIS system. Additionally, the Housing Director serves on the COC Board and staff participates in all COC work groups, including a strong partnership with the County on the planning and implementation of the biennial Homeless Census and Survey. Moreover, City staff served in direct partnership with the County Emergency Operations Center (EOC) during the COVID-19 pandemic and associated shelter-in-place, including funding for an isolation and quarantine non-congregate shelter.</p>	<p>Retain.</p>
<p>28. Provide an encampment response to abate, prevent, or deter significant encampments that impact the health and safety of the community and homeless individuals.</p>	<p>Partner with the Water District and other interested parties to implement a plan to consistently clean up encampments, prevent re-encampments, and responsibly address with the housing needs and belongings of homeless residents.</p>	<p>Completed. The City has been actively engaged in clean-up activities resulting from homeless encampments. From 2015 to 2020, the City participated in over 1,150 clean-up activities removing approximately 3,000 tons of debris and hazardous waste from the waterways. In 2021, the Housing Department pivoted from encampment abatement to encampment management. The Housing Department assisted with meal distributions, shower programs, hand washing stations, and porta potties in over 20 large homeless encampments to address the basic human needs of the encampment residents.</p>	<p>Revise or Remove.</p>

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<p>29. Research and explore potential alternative homeless housing and services options.</p>	<p>A. Examine an array of alternative housing options, including: tiny homes and other best practice or new housing and service models.</p>	<p>Completed. In 2016, the City developed a new program using manufactured homes to create an interim housing community. By the end of 2020, the first interim housing communities had housed 106 clients, with 47 of them successfully exiting to permanent housing, and the second interim housing community opened in 2021. Additionally, The City implemented a Temporary and Incidental Shelter Program providing guidance and leadership to places of assembly as they open their doors for overnight shelter. The program provided over 50 additional beds. The City also continued to fund the Overnight Warming Locations, which allows four City-owned buildings to open their doors to homeless persons during periods of inclement weather. When the sites were open, they provided 120 additional emergency shelter beds in San José. With the COVID crisis, one Overnight Warming Location stayed open through August 2020 to allow people to shelter in place. In addition to the Overnight Warming Locations, the City responded to the health crisis by opening two large City owned facilities for COVID-vulnerable homeless individuals in April 2020. One site, Parkside Hall, with 75 beds, operated through August 2020 and the other, South Hall, with 285 beds operated through April 2021.</p>	<p>Revise.</p>

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
29. Research and explore potential alternative homeless housing and services options.	B. Implement overnight safe parking program.	Completed. The City implemented its first Safe Parking Pilot program in 2018. In 2020, the program expanded to two City-owned facilities and the City implemented a Safe Parking Ordinance to allow those residing in their vehicles to park overnight in designated areas throughout San José. In total, the program assisted 457 people through 2022.	Revise.
29. Research and explore potential alternative homeless housing and services options.	C. Implement hotel/motel master leasing and conversion - see goal #26 also	Completed. In 2018, the City implemented its first interim housing program at The Plaza Hotel, a rehabilitated hotel in downtown San José. The program at the Plaza Hotel is designed to assist individuals enrolled in a Rapid Rehousing Program by providing a temporary place to stay while they search for permanent housing. By the end of 2019, the program saw 41 participants exit to permanent housing. In 2021, the Plaza designated 20 of its units to be used solely for clients who were especially vulnerable during the pandemic. The Plaza housed a total of 29 such COVID emergency placements.	Revise.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
30. Inform and engage the community around the issue of homelessness and how it impacts the City and its residents.	Develop ongoing community outreach through social and print media to provide comprehensive and consistent messaging on current services, outcomes, challenges, and long-term goals.	Completed. From 2014 to 2022, staff presented to community groups, boards, neighborhood associations, and a variety of other public and private entities on the issues of homelessness, programming and affordable housing. In addition, the Housing Department launched a podcast in 2021. The "Dwellings" podcasts focuses on the work the Department is doing to end homelessness, build affordable housing, and strengthen neighborhoods.	Retain or Revise.
31. Facilitate equal access to housing.	A. Update the Assessment of Impediments to Fair Housing.	Completed. The Analysis of Impediments update was completed in April 2017.	Revise.
31. Facilitate equal access to housing.	B. Continue to partner with nonprofit organizations to affirmatively further Fair Housing throughout the City.	Completed. The City provided CDBG funding to support the Fair Housing Consortium, a collaborative of five nonprofit agencies. From 2015 to 2021 the Fair Housing Consortium provided services to 1,070 individuals, made 268 fair housing presentations to tenants and landlords, and conducted 307 fair housing investigations, 480 client briefings and 275 legal representations.	Retain.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
31. Facilitate equal access to housing.	C. Explore opportunities to increase public awareness of and access to fair housing information and resources.	Completed. The City provided CDBG funding to support the Fair Housing Consortium, a collaborative of five nonprofit agencies. From 2015 to 2021 the Fair Housing Consortium made 268 fair housing presentations to tenants and landlords. Staff also conducted outreach on fair housing needs in preparation of the Assessment of Fair Housing. Staff also regularly referred callers to its Rent Stabilization Department to community resources for eviction prevention. In addition, the Department continued to educate the public and enforce its Tenant Protection Ordinance.	Revise.
31. Facilitate equal access to housing.	D. Review and revise as appropriate Zoning Code definition of Supportive Housing to clarify that Supportive Housing is a residential use subject only to those restrictions that apply to other residential dwellings of the same type in the same zone.	Completed. The Council approved a revised definition of Supportive Housing in the City's Zoning Code 2014. In 2020, in compliance with state law, supportive housing was added as permitted use in the Residential, Commercial, Public/Quasi-Public, Downtown, and Pedestrian Oriented Zoning Districts, where mixed use or multifamily uses are allowed.	Remove.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
32. Update the City's dispersion policy to align with the Envision 2040 General Plan.	Update the City's existing dispersion policy: 1) to align the location of future affordable housing with residential growth areas identified in the Envision 2040 General Plan; 2) to maximize the access of transit, retail, services, and amenities to affordable housing developments; and 3) to facilitate the development of diverse and complete communities.	Completed. In December 2022, City Council approved an affordable housing Siting Policy aligned with the Envision 2040 General Plan. Next steps include evaluation of the Policy's implementation and goal tracking.	Revise.
33. Protect the affordability of rental homes.	A. Assess the efficacy of the existing rent control ordinance as a tool for preserving the affordability of rental homes and the feasibility of strengthening the program.	Completed. On November 14, 2017, the City Council approved a modified Apartment Rent Ordinance providing additional protections to tenants in San José. In May 2017, an Ellis Act and Tenant Protection Ordinance were approved providing additional stability to tenants in San José. In November 2017, two additional phases of a staffing plan were also approved providing enhanced services to tenants and landlords.	Remove.
33. Protect the affordability of rental homes.	B. Review Rent Stabilization Program to determine opportunities for improvement.	Completed. On November 14, 2017, the City Council approved a modified Apartment Rent Ordinance that lowered allowable rent increases. In May 2017, an Ellis Act and Tenant Protection Ordinance were approved providing additional protections for tenants. The programs' staffing plan was also revised and approved, and implementation of a Rent Registry also registered data for 95% of ARO units in 2020.	Remove.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
33. Protect the affordability of rental homes.	C. Secure voluntary agreements for at least 75% of petitions within ordinance-required 30-day period.	Ongoing/varying results. From 2015 to 2017, the City secured voluntary agreements for at least 75% of petitions within ordinance-required 30-day period. The City did not achieve the 75% threshold from 2018 to 2021, which partially included the COVID pandemic period.	Revise.
33. Protect the affordability of rental homes.	D. Explore and establish other preservation policies, programs, or tools as appropriate.	Completed and ongoing. Housing staff developed a framework for a Community Opportunity to Purchase Program (COPA), in support of a preservation strategy for smaller buildings. The COPA program was considered by the City Council in April 2023 but was rejected. Staff began research in 2022 for a new Acquisition/Rehabilitation NOFA with a focus on smaller properties.	Revise.
34. Consider proposed policies or ordinances to protect low and moderate income residents in market-rate and deed-restricted affordable housing from displacement.	A. Explore policy requiring tenant relocation benefits so displaced low and moderate income tenants in market-rate housing can find comparable and affordable housing in San José.	Completed. In May 2017, the City Council approved an Ellis Act Ordinance. This Ordinance requires extended noticing, relocation benefits, and re-control requirements to owners who remove apartments from the rental market. Council directed modifications to the re-control provision of the ordinance are pending.	Revise or Remove.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
34. Consider proposed policies or ordinances to protect low and moderate income residents in market-rate and deed-restricted affordable housing from displacement.	B. Explore other anti-displacement policies or programs, including financing, land use, and acquisition strategies.	Completed. The City Council approved the Citywide Residential Anti-Displacement Strategy in September 2020. The Strategy was developed over more than two years with community stakeholder collaboration and public input. Additionally, a Preservation Pilot has been identified in the City's Council approved Diridon Station Affordable Housing Implementation Plan and City staff have provided technical assistance to the newly-formed South Bay Community Land Trust (SBCLT). SBCLT has received predevelopment funds to do its first preservation deal targeted for downtown or East San José.	Revise.
35. Increase the health and resilience of communities.	A. Develop partnerships, policies, and programs to increase access to healthy foods and health care resources, especially for lower-income and at-risk communities.	Completed. The City directed funding, partnered with community-based organizations and initiated new programs to increase access to healthy foods and health care resources, especially for lower-income and at-risk communities. These efforts built gardens, created open spaces, rehabilitated a school site to promote a health program, offered education and resources, provided 239,691 meals to seniors, and served 462 clients.	Retain.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
35. Increase the health and resilience of communities.	B. Explore and establish as appropriate strategies to increase economic opportunities, self-sufficiency, and asset-building for households and communities.	Completed. The City, through directed funding and programmatic partners, assisted 148 individuals with job expertise, provided 61 grants to microbusinesses suffering economically due to COVID-19 that were owned by low-income owners; assisted an estimated 60 additional individuals with employment training, housing stability, and eventual job placement; and, assisted 18 individuals to gain or retain employment.	Retain.
35. Increase the health and resilience of communities.	C. Explore a "soft story" rehabilitation program to facilitate seismic retrofits of at-risk buildings.	Ongoing. The City has been awarded funds to develop a mandatory multifamily soft story retrofit program from California Governor's Office of Emergency Services (CalOES) Hazard Mitigation Grant Program (HMPG). The Building Division has begun development of the ordinance, and the program is expected to be developed in FY 2023-24.	Retain.
36. Enhance San José's place-based neighborhood strategies.	A. Develop a strategic framework for neighborhood strategies that establishes investment criteria, priorities, goals, and metrics.	Ongoing. In 2015, the Housing Department developed guiding principles for neighborhood investments. By 2020, the Department replaced the guiding principles as a funding priority in the 2020-2024 Consolidated Plan. This fourth funding priority is to strengthen and stabilize communities' condition and help to improve residents' ability to increase their employment prospects and grow their assets. The strategic framework will be further refined in the Assessment of Fair Housing Plan at the conclusion of the Sixth Cycle Housing Element development in FY 2023-24.	Revise or Remove.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
36. Enhance San José's place-based neighborhood strategies.	B. Implement the Community Improvement Program to provide enhanced inspection services to multifamily rental properties to arrest the decline and deterioration of aging housing stock and reduce blighted conditions within lower-income neighborhoods within CDBG areas.	Completed. Under the Project Hope Program, the City increased funding to enhance code enforcement inspections in 3 neighborhoods to 6, with an additional 3 under consideration. Related to this program, the Housing Department has funded nonprofit partners to train over 700 individuals to provide services in neighborhoods to increase social capital, create economic resilience, and promote healthy communities.	Retain.
37. Educate rental property owners on ways to better manage tenants and prevent crime.	A. Multiple Housing Inspection Program: this program issues permits of occupancy for all apartments, hotels/motels, guesthouses, residential care facilities, and fraternity/sorority houses. Code Enforcement Inspectors investigate complaints about substandard housing and conduct inspections.	Completed. The City has increased outreach to property owners by increasing accessible educational information. Code Enforcement has issued quarterly newsletters that offer building safety and code compliance tips since 2015. A website for the Multiple Housing Program was created to offer resources including workshops and webinars. Code Enforcement also participates in the Mayor's Gang Task Force and Project Hope.	Retain or Revise.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
37. Educate rental property owners on ways to better manage tenants and prevent crime.	Vacant Neglected Building Program: this program monitors all identified vacant or neglected buildings so that they remain safe and secure until such time as they are rehabilitated and reoccupied. This proactive program reduces the risk of loitering, illegal occupancy, and fire hazards.	Completed. The City's Code Enforcement Department increased its workshops offerings to seven times a year. In 2020, the Code Enforcement Department transitioned its class offerings to online workshops and webinars.	Retain or Revise.
38. Continue robust code enforcement.	A. Multiple Housing Inspection Program: this program issues permits of occupancy for all apartments, hotels/motels, guesthouses, residential care facilities, and fraternity/sorority houses. Code Enforcement Inspectors investigate complaints about substandard housing and conduct inspections.	Completed. In January 2015, Code Enforcement implemented a 3-tier service delivery model, the Multiple Housing Inspection Program, to provide more frequent proactive inspections of buildings with higher risk profiles. As of 2021, the Multiple Housing Program included 6,700+ buildings and 103,000+ units. Code Enforcement Inspectors also continued to investigate complaints and ensure that violations were corrected.	Revise.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6 th Cycle
38. Continue robust code enforcement.	B. Vacant Neglected Building Program: this program monitors all identified vacant or neglected buildings so that they remain safe and secure until such time as they are rehabilitated and reoccupied. This proactive program reduces the risk of loitering, illegal occupancy, and fire hazards.	Completed. The Vacant Neglected Building Program continued operations and was expanded in June of 2018 to include vacant storefronts, and a Mandatory Registration Program was created for vacant building and storefronts in the Downtown.	Retain.
39. Continue to partner with the Responsible Landlord Engagement Initiative (RLEI).	A. Continue to support the collaboration of landlords, tenants, community leaders, elected officials, service providers and social justice advocates to identify solutions for longstanding issues with crime, safety, nuisance, gang activities, graffiti, abandoned cars, trash and more at residential properties.	Completed. The Responsible Landlord Engagement Initiative (RLEI) program concluded in 2020 after several changes in program administration. The City operated a pilot program, the Better Housing Initiative, from 2021 to 2022 to address neighborhood issues at specific target properties. RLEI was relaunched by Catholic Charities in 2022.	Revise.
39. Continue to partner with the Responsible Landlord Engagement Initiative (RLEI).	B. Staff from the Housing Department's Rent Stabilization Program will continue to attend RLEI meetings.	Completed and ongoing. Staff attended RLEI program meetings until the program ended in 2020. Housing staff attended and supported various stakeholder partner meetings to support target affordable properties, facilitate workplans, and cultivate individualized approaches to remedy operations issues under the 2021-2022 program, the Better Housing Initiative.	Revise.

5th Cycle Work Plan Item / Goal	Action/Program	2014-2023	Statewide Assessment for 6 th Cycle
40. Facilitate residential development that minimizes environmental impacts and operating costs.	A. Monitor availability of funding sources for energy and water efficiency measures.	Completed.	The City's Environmental Services Department

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40. Facilitate residential development that minimizes environmental impacts and operating costs.	B. Explore alternate bulk energy procurement mechanisms	C o m p l e t e d . In 20 17 , Ci ty C ou 	Re tai n.

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<p>41. Maintain the stock of existing owner-occupied homes.</p>	<p>A. Continue to work with nonprofit partners to provide low-cost loans for emergency home repairs.</p>	<p>C o m p l e t e d . D u r i n g t h e F i f t h C y c l e,</p>	<p>Re tai n.</p>

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		to obtain repair assistance – Habitat for Humanity and Rebuilding Together.	
41. Maintain the stock of existing owner-occupied homes.	B. Continue to provide minor grants and low-cost loans for urgent repair needs as funds remain available.	Completed. The Hou	Retain.

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42. Continue to support financial literacy programs for potential homebuyers as funds remain available.	Continue to work with nonprofit organizations to educate homebuyers.	C o m p l e t e d . A t o t a l o f 2, 0 2 7 r e s i d e n t s a t t e n d e d a f i n a n c i a l l i t e r	R e m o v e.

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5th Cycle Work Plan Item / Goal	Action/Program	2014-2023 Status/Summary	Appropriateness for 6th Cycle	
43. Continue to assist low- and moderate-income first-time homebuyers as funds remain available.	Originate 5 BEGIN second mortgages per year pending funding availability.	Completed. From 2015 to 2018, the City assisted 55 homebuyers with loans, totaling \$5,373,744 through BEGIN and CalHOME programs and revenue derived from the City's Inclusionary Housing program. From 2019 to 2021, no new second mortgages were provided due to lack of funds, lack of capacity and focus on the COVID emergency.	Revise.	
44. Explore providing design guidance for convenient site accessibility for residents, workers, and visitors.	A. Explore utilization of existing accessible homes.	In progress. Staff has recently been hired to review and update the Housing Department's accessibility design guidance.	Revise.	
44. Explore providing design guidance for convenient site accessibility for residents, workers, and visitors.	B. Explore partnership with organizations that provide outreach to disabled persons.	Completed. From 2018 to 2021 staff participated in workshops on housing solutions for disabled populations and helped to make connections among development partners and nonprofit partners who focus on providing housing to disabled populations.	Revise.	
44. Explore providing design guidance for convenient site accessibility for residents, workers, and visitors.	C. Explore ways to encourage site accessibility design in residential development.	Completed. The City subsidized The Kelsey development, which application was submitted in 2018, for development of affordable housing for intellectually/developmentally disabled individuals blended with market-rate apartments.	Revise.	

Effectiveness of goals, policies, and related actions in meeting the housing needs of special needs populations

While the Fifth Cycle list of programs had very few specific goals and policies about special needs housing (e.g., #31, “facilitate equal access to housing”), there was a significant, substantial number of special needs units produced and otherwise moved forward. During the Fifth Cycle, both the City and County had prioritized permanent supportive housing (PSH) for persons experiencing homelessness. Therefore, a high proportion of units permitted during the Fifth Cycle target this special population.

In the Fifth Cycle, approximately 2,900 affordable housing units for low-income, very low-income, and extremely low-income households were permitted. Per Table C-4 below, the majority of these units – approximately 1,600 units – were targeted/reserved for special needs populations.

Table C-4: Special Needs Units Permitted During the Fifth Cycle

Population	Number of Units	% of Total 5th Cycle Affordable Housing Units
Homeless persons (PSH)	820	28.3%
Homeless persons (Rapid Re-Housing)	86	3.0%
Homeless persons (other programs)	40	1.4%
Youth	22	0.8%
Developmentally disabled	32	1.1%
Seniors [1]	622	21.4%
Veterans [2]	48	1.7%
TOTAL Targeted Units [3]	1,602	57.5% (out of 2,902 units)

NOTES: [1] Senior units include 20 units also counted as homeless units; [2] All 48 veterans’ units also counted as homeless units; [3] Per notes [1] and [2], the total nets out 68 units that meet two of the category definitions to prevent double counting.

In addition to units targeted towards the specific populations listed above, Table C-5 contains data on additional households that meet a special needs definition and currently live in affordable homes completed and occupied during the Fifth Cycle. These numbers are understated, as the City only has rent roll data for approximately 900 of the 2,900 affordable units permitted during the Fifth Cycle. The gap in data is due to a variety of reasons, including that not all permitted units have completed construction, not all constructed projects have completed reporting, and not all developments are required to report rent information to the City.

Table C-5: Additional Special Needs Occupancy, Fifth Cycle

Population	Number of Households	% of Total 5th Cycle Affordable Housing Units for which the City has Rent Rolls
Large families [1]	24	2.7%
Householder self-identifies as disabled [2]	142	16.0%
TOTAL Non-Targeted Units	166	18.7% (out of 887 units)

NOTES: [1] Large families are households with 5 or more persons; [2] Reporting forms do not ask about disability status of other household members.

The City does not currently track occupancy data on other special needs residents who may be occupying restricted affordable apartments (e.g., female-headed households or farmworkers).