

# Housing Department

Jacky Morales-Ferrand, Director

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**T**o strengthen and revitalize our community through housing and neighborhood investment

## City Service Area

### Community and Economic Development

#### Core Services

##### **Affordable Housing Portfolio Management**

Manage the City's affordable housing loan portfolio, including loan servicing and monitoring; compliance of income restricted apartments; retain and extend the length of the restrictions to preserve the long-term affordability of the apartments

##### **Affordable Housing Production and Preservation**

Provide financing for the rehabilitation, development, and construction of affordable housing; provide technical assistance to market-rate developers to meet their affordable housing requirements; offer limited homeownership loans; and administer Inclusionary and Housing Impact fee programs

##### **Homelessness Interventions and Solutions**

Provide a coordinated response to homeless residents including street based outreach, case management, essential services; referrals and housing options; and invest in interim short-term housing solutions

##### **Neighborhood Capital Investment and Public Services**

Invest in at-risk residents and neighborhoods; provide funding for housing and community development capital projects; and provide support to public service organizations

##### **Rent Stabilization and Tenant Protection**

Administer rent stabilization programs and requirements that stabilize rents, while assuring landlords a fair return, and that protect tenants; mitigate impacts of displacement; and prevent retaliation

**Strategic Support:** Planning and Policy Development, Public Education, Budget, Financial Management, Clerical Support, Human Resources, and Audit Supervision

# Housing Department

## Service Delivery Framework

PROGRAM	DESCRIPTION
<b><i>Affordable Housing Portfolio Management Core Service</i></b>	
<b>Loan Compliance</b>	Manages and oversees the City's affordable housing loan portfolio including loan servicing and monitoring and compliance of affordable deed restricted apartments.
<b>Property Maintenance and Inspection</b>	Works with existing developments to retain and preserve the long-term viability of affordable apartments.
<b><i>Affordable Housing Production and Preservation Core Service</i></b>	
<b>Affordable Housing Development Loans</b>	Provides financing and technical assistance for the development of new affordable housing developments for low-income households and individuals.
<b>Homeownership Opportunities</b>	Provides a limited number of down payment assistance loans and loan servicing for recipients of lending programs.
<b>Inclusionary Housing</b>	Provides technical assistance to market-rate developers in meeting their affordable housing requirements.
<b>Rehabilitation Loans and Grants</b>	Funds minor home repairs for low-income homeowners and mobilehome owners.
<b><i>Homelessness Interventions and Solutions Core Service</i></b>	
<b>Homeless Outreach and Case Management</b>	Provides a coordinated response to unsheltered homeless residents including street-based outreach, engagement, case management, and essential services such as mobile hygiene, warming locations, and temporary and incidental shelters.
<b>Interim Supportive Housing Development</b>	Develops and oversees operation of interim housing solutions to bridge the gap from temporary shelter to permanent supportive housing.
<b>Joint Encampment Response Team</b>	Removes unauthorized encampments, prioritizes them based on location and conditions, and offers outreach services and housing referrals to unhoused residents.
<b>Tenant Based Rental Assistance and Rapid Rehousing</b>	Provides short-term rental subsidies, with supportive services during the subsidy period, to help homeless residents obtain permanent housing as quickly as possible.
<b><i>Neighborhood Capital Investment and Public Services Core Service</i></b>	
<b>Community Development Block Grant - Infrastructure Investments</b>	Funds infrastructure improvements in low-income neighborhoods and those serving communities in need.

# Housing Department

## Service Delivery Framework

PROGRAM	DESCRIPTION
<b><i>Neighborhood Capital Investment and Public Services Core Service</i></b>	
<b>Non-Profit Service Grants to Support Housing and Community Development Needs</b>	Provides grants to non-profit organizations to support fair housing and tenant legal services, senior programs, and homeless programs.
<b>Place-Based Neighborhood Strategy</b>	Provides community engagement and leadership development services in challenged neighborhoods.
<b><i>Rent Stabilization and Tenant Protection Core Service</i></b>	
<b>Apartment Rent Ordinance Administration</b>	Protects tenants from excessive rent increases and evictions while assuring landlords a fair return; provide balanced treatment for both tenants and landlords through efficient and consistent administration of the apartment rent stabilization programs.
<b>Mobilehome Rent Ordinance Administration</b>	Protects mobilehome residents from excessive rent increases while assuring park owners receive a fair return through efficient and consistent administration of the Mobilehome Rent Ordinance.
<b><i>Strategic Support Core Service</i></b>	
<b>Housing Planning and Policy Development</b>	Analyzes, develops and recommends public policy to strengthen affordable housing and community development programs. Provides research support for advancement of new and one-time programs. Tracks and coordinates the Department's legislative response to legislation and program regulations at both the State and Federal levels.
<b>Housing Management and Administration</b>	Provides administrative oversight for the department, including executive management, financial management, human resources, and analytical support.

# Housing Department

## Department Budget Summary

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### Expected 2019-2020 Service Delivery

- Advance 11 affordable housing developments, totaling 1,144 new apartments, as part of the implementation of the \$100 million Notice of Funding Availability.
- Begin construction on 754 affordable apartments. Complete construction on 563 affordable apartments that will provide housing for 417 chronically homeless individuals.
- Identify affordable housing developments to apply for the Affordable Housing and Sustainable Communities Program to leverage both affordable housing and infrastructure funds.
- Create a Moderate-Income Strategy to promote housing opportunities for residents who typically receive no housing subsidies, and fund up to \$10 million in moderate-income housing opportunities.
- Fund rental subsidies and supportive services for up to 250 individuals, families, and transitional age youth.
- Increase interim housing solutions by implementing two Bridge Housing Communities and continuing to manage the Plaza Hotel.
- Continue to implement city-wide homelessness response programming and continue to partner with Destination: Home, a public-private partnership, the County of Santa Clara in implementing and updating of the Community Plan to End Homelessness.
- Oversee registration of organizations participating in the Temporary and Incidental Shelter and Safe Parking Programs per the recently adopted Citywide Ordinances.
- Implement the 2019-2020 Annual Action Plan authorizing the use of \$30.7 million in federal funds to increase and preserve affordable housing, respond to homelessness, strengthen neighborhoods, and promote fair housing.
- Fund and implement a legal assistance program for low-income tenants and landlords to increase housing stability by providing landlord/tenant counseling, education, referrals, and legal assistance.
- Conduct outreach to and educate tenants and landlords on their rights and responsibilities under the Apartment Rent Ordinance, Tenant Protection Ordinance, and Ellis Act Ordinance.
- Develop a communication plan and tools to support the Housing Department's programs including website enhancement, social media expansion and development of a public information campaign.

### 2019-2020 Key Budget Actions

- Establish new funds to separately track the Rent Stabilization and the Inclusionary Fee Programs.
- Continue 1.0 limit dated Information Systems Analyst position to support the Housing Department Salesforce application and continue support of the Rent Stabilization applications.
- Continue 1.0 Senior Development Officer position to support affordable housing transactions in response to the City's 10,000 affordable housing unit goal, assisting with underwriting services for the 11 new projects and the refinancing of existing developments.
- Allocate one-time funding of \$10.0 million for "Missing Middle" moderate-income affordable housing.
- Establish an Affordable Housing Web Portal Reserve to fund an affordable housing database to expedite the search for units and application process for residents seeking affordable housing.
- Adds one-time funding to continue the Responsible Landlord Engagement Initiative (\$205,000 General Fund), the San Jose Streets Team Litter and Trash Removal Program (\$135,000 General Fund), and the pilot program to assist up to 100 families in need impacted by domestic violence, sexual assault, human trafficking and family violence (\$75,000 Multi-Source Housing Fund).

### Operating Funds Managed

- |   |   |
|---|---|
| <input type="checkbox"/> Community Development Block Grant Fund         | <input type="checkbox"/> Housing Trust Fund                         |
| <input type="checkbox"/> Economic Development Administration Loan Fund  | <input type="checkbox"/> Inclusionary Fee Fund                      |
| <input type="checkbox"/> Home Investment Partnership Program Trust Fund | <input type="checkbox"/> Low and Moderate Income Housing Asset Fund |
|   | <input type="checkbox"/> Multi-Source Housing Fund                  |
|   | <input type="checkbox"/> Rent Stabilization Fee Fund                |

# Housing Department

## Department Budget Summary

	2017-2018 Actuals ***	2018-2019 Adopted	2019-2020 Forecast	2019-2020 Adopted
<b>Dollars by Core Service</b>				
Affordable Housing Portfolio Management	1,653,716	2,135,425	2,317,807	2,317,807
Affordable Housing Production and Preservation	10,785,592	28,051,245	27,259,331	41,234,619
Homelessness Interventions and Solutions	11,307,464	22,270,155	24,109,650	24,697,325
Neighborhood Capital Investment and Public Services	8,307,004	18,246,930	17,964,357	19,436,136
Rent Stabilization and Tenant Protection	1,630,119	3,220,543	2,954,395	3,053,824
Strategic Support - Community & Economic Development	3,836,815	3,875,296	3,784,251	4,142,696
Strategic Support - Other - Community & Economic Development	4,338,337	2,761,680	2,228,198	2,278,217
<b>Total</b>	<b>\$41,859,046</b>	<b>\$80,561,274</b>	<b>\$80,617,989</b>	<b>\$97,160,624</b>
<b>Dollars by Category</b>				
<b>Personal Services and Non-Personal/Equipment</b>				
Salaries/Benefits	9,571,767	11,819,272	12,349,017	13,071,243
Overtime	75,484	34,830	24,830	24,830
<b>Subtotal Personal Services</b>	<b>\$9,647,251</b>	<b>\$11,854,102</b>	<b>\$12,373,847</b>	<b>\$13,096,073</b>
Non-Personal/Equipment	1,722,648	2,809,422	1,594,874	2,194,874
<b>Total Personal Services &amp; Non-Personal/Equipment</b>	<b>\$11,369,899</b>	<b>\$14,663,524</b>	<b>\$13,968,721</b>	<b>\$15,290,947</b>
<b>Other Costs*</b>				
City-Wide Expenses	2,617,052	4,640,000	5,550,000	8,250,000
Debt Service/Financing	2,023,821	0	0	0
Housing Loans and Grants	15,894,008	35,451,759	35,451,759	51,408,899
Other	8,096,208	23,523,858	23,523,858	20,037,108
Overhead Costs	1,842,603	2,182,133	2,023,651	2,073,670
Workers' Compensation	15,456	100,000	100,000	100,000
<b>Total Other Costs</b>	<b>\$30,489,147</b>	<b>\$65,897,750</b>	<b>\$66,649,268</b>	<b>\$81,869,677</b>
<b>Total</b>	<b>\$41,859,046</b>	<b>\$80,561,274</b>	<b>\$80,617,989</b>	<b>\$97,160,624</b>

\* Fund Balance, Transfers, and Reserves for funds that may be managed by this department have been excluded from this display. This information can be found in Source and Use of Funds Statements elsewhere in this document. The amounts in the 2018-2019 Adopted Budget column may vary from the published Adopted Budget due to the realignment of Other Costs (primarily City-Wide Expenses and General Fund Capital) between Departments.

\*\* The positions displayed in the 2017-2018 Actuals column reflect those included in the 2017-2018 Adopted Budget.

\*\*\* 2017-2018 Actuals may not subtotal due to rounding.

# Housing Department

## Department Budget Summary

	2017-2018 Actuals ***	2018-2019 Adopted	2019-2020 Forecast	2019-2020 Adopted
<b>Dollars by Fund</b>				
General Fund (001)	3,309,426	5,329,466	5,798,365	8,838,664
Community Development Block Grant Fund (441)	9,048,527	10,761,356	10,638,078	13,163,586
Home Investment Partnership Program Trust Fund (445)	2,097,291	8,280,294	8,207,601	2,526,798
Housing Trust Fund (440)	1,968,074	1,909,839	2,032,845	2,117,845
Rental Stabilization Program Fee Fund (450)	0	0	0	3,360,817
Inclusionary Fee Fund (451)	0	0	0	224,007
Low And Moderate Income Housing Asset Fund (346)	14,224,595	28,012,531	27,963,705	47,317,209
Multi-Source Housing Fund (448)	11,211,135	26,267,788	25,977,395	19,611,698
<b>Total</b>	<b>\$41,859,046</b>	<b>\$80,561,274</b>	<b>\$80,617,989</b>	<b>\$97,160,624</b>
<b>Positions by Core Service**</b>				
Affordable Housing Portfolio Management	11.00	11.50	11.50	11.50
Affordable Housing Production and Preservation	12.00	12.50	11.50	13.00
Homelessness Interventions and Solutions	7.50	7.00	7.00	9.00
Neighborhood Capital Investment and Public Services	10.05	8.80	10.80	9.80
Rent Stabilization and Tenant Protection	7.35	17.85	17.05	17.55
Strategic Support - Community & Economic Development	18.10	19.85	19.65	20.65
<b>Total</b>	<b>66.00</b>	<b>77.50</b>	<b>77.50</b>	<b>81.50</b>

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# Housing Department

## Department Budget Summary

	2017-2018 Actuals**	2018-2019 Adopted	2019-2020 Forecast	2019-2020 Adopted	2019-2020 Adopted Positions
<b>Dollars by Program*</b>					
<b>Affordable Housing Portfolio Management</b>					
Loan Compliance	1,626,518	1,910,425	2,092,807	2,092,807	11.50
Property Maintenance and Inspection	27,198	225,000	225,000	225,000	0.00
<b>Sub-Total</b>	<b>1,653,716</b>	<b>2,135,425</b>	<b>2,317,807</b>	<b>2,317,807</b>	<b>11.50</b>
<b>Affordable Housing Production and Preservation</b>					
Affordable Housing Development Loans	7,168,929	26,241,075	25,484,825	39,989,344	7.80
Homeownership Opportunities	778,138	935,000	935,000	70,000	0.00
Inclusionary Housing	577,285	222,854	199,378	199,378	1.00
Rehabilitation Loans and Grants	2,261,240	652,316	640,128	975,897	4.20
<b>Sub-Total</b>	<b>10,785,592</b>	<b>28,051,245</b>	<b>27,259,331</b>	<b>41,234,619</b>	<b>13.00</b>
<b>Homelessness Interventions and Solutions</b>					
Homeless Outreach and Case Management	2,906,096	10,149,394	10,203,889	9,775,876	4.00
Interim Supportive Housing Development	0	705,761	705,761	3,439,044	0.00
Joint Encampment Response Team	2,122,137	1,675,000	1,550,000	1,585,000	3.00
Local and Regional Coordination/Policy Development to End Homelessness	0	0	0	200,000	0.00
Tenant Based Rental Assistance and Rapid Rehousing	6,279,231	9,740,000	11,650,000	9,697,405	2.00
<b>Sub-Total</b>	<b>11,307,464</b>	<b>22,270,155</b>	<b>24,109,650</b>	<b>24,697,325</b>	<b>9.00</b>
<b>Neighborhood Capital Investment and Public Services</b>					
Community Development Block Grant - Infrastructure Investments	3,893,783	8,075,497	7,979,569	10,911,788	7.19
Non-Profit Service Grants to Support Housing and Community Development Needs	4,182,140	9,732,467	9,472,061	7,967,805	0.11
Place-Based Neighborhood Strategy	231,081	438,966	512,727	556,543	2.50
<b>Sub-Total</b>	<b>8,307,004</b>	<b>18,246,930</b>	<b>17,964,357</b>	<b>19,436,136</b>	<b>9.80</b>
<b>Rent Stabilization and Tenant Protection</b>					
Apartment Rent Ordinance Administration	1,474,669	2,994,620	2,748,950	2,836,364	16.20
Mobilehome Rent Ordinance Administration	155,450	225,923	205,445	217,460	1.35
<b>Sub-Total</b>	<b>1,630,119</b>	<b>3,220,543</b>	<b>2,954,395</b>	<b>3,053,824</b>	<b>17.55</b>
<b>Strategic Support - Community &amp; Economic Development</b>					
Housing Management and Administration	3,413,588	3,611,027	3,437,076	3,537,076	17.15
Housing Planning and Policy Development	423,226	264,269	347,175	605,620	3.50
<b>Sub-Total</b>	<b>3,836,815</b>	<b>3,875,296</b>	<b>3,784,251</b>	<b>4,142,696</b>	<b>20.65</b>

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# Housing Department

## Department Budget Summary

	2017-2018	2018-2019	2019-2020	2019-2020	2019-2020
	Actuals**	Adopted	Forecast	Adopted	Adopted Positions
<b>Strategic Support - Other - Community &amp; Economic Development</b>					
Housing Funds Debt/Financing Costs	2,023,821	0	0	0	0.00
Housing Other Departmental - City-Wide	0	375,000	0	0	0.00
Housing Other Departmental - Grants	418,888	34,547	34,547	34,547	0.00
Housing Overhead	1,829,377	2,182,133	2,023,651	2,073,670	0.00
Housing Transfers	50,795	70,000	70,000	70,000	0.00
Housing Workers' Compensation	15,456	100,000	100,000	100,000	0.00
<b>Sub-Total</b>	<b>4,338,337</b>	<b>2,761,680</b>	<b>2,228,198</b>	<b>2,278,217</b>	<b>0.00</b>
<b>Total</b>	<b>\$41,859,046</b>	<b>\$80,561,274</b>	<b>\$80,617,989</b>	<b>\$97,160,624</b>	<b>81.50</b>

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# Housing Department

## Budget Reconciliation

### Personal Services and Non-Personal/Equipment (2018-2019 Adopted to 2019-2020 Adopted)

	Positions	All Funds (\$)	General Fund (\$)
<b>Prior Year Budget (2018-2019):</b>	<b>77.50</b>	<b>14,663,524</b>	<b>689,466</b>
<b>Base Adjustments</b>			
<b>One-Time Prior Year Expenditures Deleted</b>			
• Rebudget: Rent Stabilization Program	(1.00)	(700,000)	0
• Rental Rights and Referrals Program (1.0 Information Systems Analyst)		(247,092)	0
• Housing Department Special Projects		(175,000)	
• Responsible Landlord Engagement Initiative		(155,000)	(155,000)
• San Jose Streets Team Litter and Trash Removal	(1.00)	(135,000)	(135,000)
• Housing Production Program - Homelss Projects (1.0 Senior Development Officer)		(130,763)	0
• Housing Department Public Outreach Program		(100,000)	0
• Downtown Streets Monterey Road Pilot Program		(90,000)	(90,000)
• Revenue Results Software Phase II Implementation		(1,300)	0
<b>One-Time Prior Year Expenditures Subtotal:</b>	<b>(2.00)</b>	<b>(1,734,155)</b>	<b>(380,000)</b>
<b>Technical Adjustments to Costs of Ongoing Activities</b>			
• Salary/benefit changes		788,366	(61,101)
• Grant from California Department of Social Services to Support Coyote Creek Flood Recovery Efforts (City Council approval March 6, 2018) ( Adds 2.0 Community Coordinator)	2.00	211,334	0
• Rent Stabilization Program Hearing Officers		43,781	0
• Print Management		(4,129)	0
<b>Technical Adjustments Subtotal:</b>	<b>2.00</b>	<b>1,039,352</b>	<b>(61,101)</b>
<b>2019-2020 Forecast Base Budget:</b>	<b>77.50</b>	<b>13,968,721</b>	<b>248,365</b>
<b>Budget Proposals Approved</b>			
1. Bridge Housing Communities	2.00	332,170	0
2. Responsible Landlord Engagement Initiative		205,000	205,000
3. Salesforce Technical Support	1.00	198,850	0
4. Affordable Housing Transactions Staffing	1.00	190,134	0
5. San Jose Streets Team Litter and Trash Removal		135,000	135,000
6. Administrative Alignment and Inspector Vehicles	0.00	60,773	0
7. Housing Policy Team Staffing	0.00	299	299
8. Housing Fee Program	0.00	0	0
9. Local Sales Tax Expenditure Allocation		0	0
10. Rebudget: Underwriting and Land Use Consulting Services		100,000	0
11. Rebudget: Website Design		100,000	0
<b>Total Budget Proposals Approved</b>	<b>4.00</b>	<b>1,322,226</b>	<b>340,299</b>
<b>2019-2020 Adopted Budget Total</b>	<b>81.50</b>	<b>15,290,947</b>	<b>588,664</b>

# Housing Department

## Budget Changes By Department Personal Services and Non-Personal/Equipment

2019-2020 Adopted Budget Changes	Positions	All Funds (\$)	General Fund (\$)
<b>1. Bridge Housing Communities</b>  <i>Community and Economic Development CSA Homelessness Interventions and Solutions Core Service Tenant Based Rental Assistance and Rapid Rehousing Program</i>	2.00	332,170	0
<p>This action adds 1.0 limit-dated Analyst position and 1.0 limit-dated Housing Policy and Planning Administrator position through June 30, 2020 to support the development and implementation of the two new Bridge Housing Communities (BHC). On December 18, 2018, City Council approved the plans for two Bridge Housing Communities. Once construction of the two sites is complete, staff will work with the BHC operator to finalize the site operations and services plan, monitor operations, and report BHC performance over the first year of operation. (Ongoing costs: \$0)</p>			
<b>2. Responsible Landlord Engagement Initiative</b>  <i>Community and Economic Development CSA Neighborhood Capital Investment and Public Services Core Service Non-Profit Service Grants to Support Housing and Community Development Needs Program</i>		205,000	205,000
<p>This action adds one-time non-personal/equipment funding of \$205,000 to support the Responsible Landlord Engagement Initiative (RLEI) reflecting a continuation of the 2018-2019 allocation in the amount of \$155,000 and an increase of \$50,000 as directed by the 2019-2020 Mayor's June Budget Message. This one-time funding continues support for the program's efforts to encourage property owners to manage their properties in a responsible manner and to work with tenants and community groups to improve the safety and security of San José neighborhoods. (Ongoing costs: \$0)</p>			
<b>3. Salesforce Technical Support</b>  <i>Community and Economic Development CSA Affordable Housing Production and Preservation Core Service Rent Stabilization and Tenant Protection Core Service Affordable Housing Development Loans and Apartment Rent Ordinance Administration Programs</i>	1.00	198,850	0
<p>This action continues 1.0 limit-dated Information Systems Analyst position, funded by the Low and Moderate Income Housing Asset Fund (50%) and Rent Stabilization Program Fee Fund (50%), through June 30, 2020 to support the Housing Department's Salesforce System, which is the foundation for both the City's online rent registry and loan portfolio management. This position is the last staffing addition per the comprehensive Rent Stabilization Program staffing plan that was approved by the City Council in November 2017. The position will also maintain the portfolio management system which tracks the City's entire \$760 million portfolio of over 1,200 loans and 18,000 City facilitated affordable rental units. (Ongoing costs: \$0)</p>			

# Housing Department

## Budget Changes By Department Personal Services and Non-Personal/Equipment

2019-2020 Adopted Budget Changes	Positions	All Funds (\$)	General Fund (\$)
<b>4. Affordable Housing Transactions Staffing</b>  <i>Community and Economic Development CSA Affordable Housing Production and Preservation Core Service Affordable Housing Development Loans Program</i>	1.00	190,134	0

This action extends 1.0 limit-dated Senior Development Officer position through June 30, 2020, funded by the Low and Moderate Income Housing Asset Fund, to support affordable housing transactions. The Mayor and the City Council adopted a Housing Crisis Workplan that prioritizes the creation of 10,000 affordable housing units in just five years. While additional resources are needed to meet this goal, the Housing Department issued a \$100 million Notice of Funding Availability and anticipates underwriting 11 new developments that will add a total of 1,144 affordable apartments to the City's housing inventory. In addition to developing new affordable housing, the Department has a large pipeline of existing developments built in the 1990's that are scheduled to be refinanced. The Senior Development Officer is part of a team of staff and consultants that will assist with the underwriting of these new developments. (Ongoing costs: \$0)

<b>5. San Jose Streets Team Litter and Trash Removal</b>  <i>Community and Economic Development CSA Neighborhood Capital Investment and Public Services Core Service Place-Based Neighborhood Strategy Program</i>		135,000	135,000
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This action continues one-time non-personal/equipment funding of \$135,000 to continue litter and trash removal services that have been provided by the San Jose Streets Team. This is part of San José's larger effort to tackle blight and litter in public spaces. (Ongoing costs: \$0)

<b>6. Administrative Alignment and Inspector Vehicles</b>  <i>Community and Economic Development CSA Affordable Housing Production and Preservation Core Service Rehabilitation Loans and Grants Program</i>	0.00	60,773	0
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This action eliminates 1.0 Office Specialist position effective July 1, 2019 and adds 1.0 Staff Specialist position effective September 1, 2019 to provide a higher level of administrative support. The Staff Specialist position is the primary administrative support position for the Administrative Services, Policy, and Public Information/Media functions handling numerous special projects. Additionally, this position coordinates Information Technology work orders for the Department, assists with new employee on boarding, drafts and publishes Housing Department intra/internet announcements, and is the back up support for the Director's Administrative Assistant. This action also shifts funding for a portion (0.3) of a Building Rehabilitation Inspector position from the Multi-Source Housing Fund to the Low and Moderate Income Housing Asset Fund to align the position with the work to be performed in the coming year. In addition, this action adds one-time non-personal/equipment funding of \$60,000 in the Low and Moderate Income Housing Asset Fund for the replacement of two Building Rehabilitation Inspector vehicles. (Ongoing costs: \$18,844)

# Housing Department

## Budget Changes By Department Personal Services and Non-Personal/Equipment

2019-2020 Adopted Budget Changes	Positions	All Funds (\$)	General Fund (\$)
7. Housing Policy Team Staffing	0.00	299	299

**Community and Economic Development CSA**  
**Neighborhood Capital Investment and Public Services Core Service**  
**Strategic Support Core Service**  
*Place-Based Neighborhood Strategy and Housing Planning and Policy Development Programs*

This action deletes 1.0 Community Services Supervisor position effective July 1, 2019 and adds 1.0 Senior Development Officer position effective September 1, 2019, funded in the General Fund, to expand and coordinate the implementation of proactive efforts within the Housing Department to address issues of race and equity in the Department's work. In 2018, the City of San José joined the Government Alliance for Race and Equity (GARE), a national network of over 100 governments working to achieve racial equity and advance opportunities for all. The City began efforts in this work with a 14-member GARE introductory cohort in 2018 which included the Housing Department. The City expanded these efforts in 2019 with a new 20-person cohort. This position will enable the Housing Department to organize an internal team of eight and will build capacity on the Policy Team. This staff person will expand the capacity for the staff to complete the Anti-Displacement work, Affirmatively Furthering Fair Housing work, and the implementation of the Source of Income Ordinance with a race and equity lens. This position will also assist the Department in disaster preparedness and emergency response planning efforts. (Ongoing costs: \$31,988)

8. Housing Fee Program	0.00	0	0
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**Community and Economic Development CSA**  
**Affordable Housing Production and Preservation Core Service**  
**Rent Stabilization and Tenant Protection Core Service**  
*Affordable Housing Development Loans, Inclusionary Housing, Apartment Rent Ordinance Administration, and Mobilehome Rent Ordinance Administration Programs*

This action reallocates staffing and associated non-personal/equipment funding to the new Rent Stabilization Program Fee Fund and the Inclusionary Fee Fund that were established as part of the 2019-2020 Adopted Budget. These funds were established to facilitate the tracking and reporting of moneys in these Fee Programs that had previously been reported in the Multi-Source Housing Fund and Low and Moderate Income Housing Asset Fund to provide increased transparency. This action reallocates 17.0 positions and \$707,030 in non-personal/equipment funding from Multi-Source Housing Fund to the Rent Stabilization Program Fee Fund and 1.0 position from Low and Moderate Income Housing Asset Fund to the Inclusionary Fee Fund. (Ongoing costs: \$0)

# Housing Department

## Budget Changes By Department Personal Services and Non-Personal/Equipment



2019-2020 Adopted Budget Changes	Positions	All Funds (\$)	General Fund (\$)
<b>9. Local Sales Tax Expenditure Allocation</b>		0	0
<i>Community and Economic Development CSA Neighborhood Capital Investment and Public Services Core Service Place-Based Neighborhood Strategy Program</i>			
<p>This action decreases the Housing Department's Non-Personal/Equipment appropriation by \$135,000 and establishes the corresponding Local Sales Tax - San Jose Streets Team Litter and Trash Removal appropriation to the Housing Department. As described in Manager's Budget Addendum #34 and approved by the City Council as part of the Mayor's June Budget Message for Fiscal Year 2019-2020, these actions will provide a breakdown of specific expenditures funded by the Local Sales Tax along with the accounting of the Local Sales Tax revenues received to facilitate the year end reconciliation, which will be provided to the Local Sales Tax Citizens Oversight Committee. (Ongoing costs: \$0)</p>			
<b>10. Rebudget: Underwriting and Land Use Consulting Services</b>		100,000	0
<i>Community and Economic Development CSA Strategic Support Core Service Housing Planning and Policy Development Program</i>			
<p>This action rebudgets unexpended 2018-2019 non-personal/equipment funding of \$100,000 for underwriting and land use consulting services. This will cover services such as on call multi-family loan underwriting support and conducting research for the purposes of developing or modifying policy and procedures for affordable housing projects and programs. These services will also assist the Housing Department with financial land use analysis and incentivizing affordable residential developments on vacant land. (Ongoing costs: \$0)</p>			
<b>11. Rebudget: Website Design</b>		100,000	0
<i>Community and Economic Development CSA Strategic Support Core Service Housing Management and Administration Program</i>			
<p>This action rebudgets unexpended 2018-2019 non-personal/equipment funding of \$100,000 for website design. This one-time funding was provided as part of the 2018-2019 Adopted Operating Budget in conjunction with the establishment of the Housing Department Public Information team. This rebudget will preserve the funding to allow the new team to provide a cohesive, user-friendly Housing website coordinated with other efforts to redesign the City's entire website. (Ongoing costs: \$0)</p>			
<b>2019-2020 Adopted Budget Changes Total</b>	<b>4.00</b>	<b>1,322,226</b>	<b>340,299</b>

# Housing Department

## Performance Summary

### Affordable Housing Portfolio Management

#### Performance Measures

	2017-2018 Actual	2018-2019 Target	2018-2019 Estimated	2019-2020 Target
 Monetary default rate of loan portfolio by category:				
% of total loan principal:				
1. Project Loans	0%	0%	0%	0%
2. Rehabilitation Loans	0%	0%	0%	0%
3. Homebuyer Loans	1%	1%	1%	1%
% of total loans:				
1. Project Loans	0%	0%	0%	0%
2. Rehabilitation Loans	0%	0%	0%	0%
3. Homebuyer Loans	1%	1%	1%	1%
 % of portfolio units brought into compliance with safe and sanitary condition requirements within 90 days	65%	75%	75%	75%

#### Activity and Workload Highlights




	2017-2018 Actual	2018-2019 Forecast	2018-2019 Estimated	2019-2020 Forecast
# of single family Loan Management transactions (refinances, subordinations, assumptions, payoffs)	105	180	90	75
Size of Housing Department loan portfolio by category:				
Total loan principal (\$):				
1. Project Loans	\$618,000,000	\$690,000,000	\$635,000,000	\$651,000,000
2. Rehabilitation Loans	\$12,000,000	\$9,500,000	\$10,000,000	\$9,500,000
3. Homebuyer Loans	\$57,200,000	\$50,000,000	\$55,000,000	\$50,000,000
Total	\$687,200,000	\$749,500,000	\$700,000,000	\$710,500,000
Total number of loans:				
1. Project Loans	164	177	169	172
2. Rehabilitation Loans	350	250	250	200
3. Homebuyer Loans	1,012	850	850	800
Total	1,526	1,277	1,269	1,172
# of major projects in loan portfolio inspected annually				
- Projects	20	90	90	90
- Units	1,360	1,620	1,620	1,620
# of City facilitated affordable rental units	22,203	18,375	18,665	21,021
# of income restricted for-sale homes	1,362	1,750	1,100	1,000

# Housing Department

## Performance Summary

### Affordable Housing Production and Preservation

#### Performance Measures

	2017-2018 Actual	2018-2019 Target	2018-2019 Estimated	2019-2020 Target
 Cumulative ratio of non-City funds to City funds over the last five years in the New Construction Program	3.08:1	2.20:1	3.66:1	4.15:1
 % of annual target achieved for production of affordable housing/# of units	100% (70)	100% (225)	111% ( 249)	100% (280)
 % of funding committed to extremely low-income households	N/A <sup>1</sup>	N/A <sup>1</sup>	N/A <sup>1</sup>	45%

<sup>1</sup> This measure was established in 2019-2020 Operating Budget and data for 2017-2018 and 2018-2019 are not available.

#### Activity and Workload Highlights




	2017-2018 Actual	2018-2019 Forecast	2018-2019 Estimated	2019-2020 Forecast
# of affordable housing units completed in the fiscal year	64	225	290	345
Average per-unit subsidy in funding commitments for new construction projects	\$75,000	\$125,000	\$125,000	\$125,000

# Housing Department

## Performance Summary

### Homeless Interventions and Solutions


#### Performance Measures

	2017-2018 Actual	2018-2019 Target	2018-2019 Estimated**	2019-2020 Target
 Reduction in the number of homeless individuals from prior two years <sup>1</sup>	(287)	300	0	300
 % of households who exit the Rapid Rehousing Program into permanent housing that maintain Housing for at least 6 months	N/A <sup>2</sup>	N/A <sup>2</sup>	N/A <sup>2</sup>	85%
 Average number of days from enrollment households in rapid rehousing programs got into permanent housing	N/A <sup>2</sup>	N/A <sup>2</sup>	N/A <sup>2</sup>	60 days

<sup>1</sup> This number is collected on a biennial basis.

<sup>2</sup> This measure was established in 2019-2020 Operating Budget and data for 2017-2018 and 2018-2019 are not available.

#### Activity and Workload Highlights

	2017-2018 Actual	2018-2019 Forecast	2018-2019 Estimated	2019-2020 Forecast
 # of households who maintained permanent housing in City-funded rapid rehousing programs in the last 12 months	N/A <sup>1</sup>	N/A <sup>1</sup>	N/A <sup>1</sup>	150
Estimated number of homeless individuals Counted in San Jose <sup>2</sup> :				
- Chronically homeless	1,205	1,300	1,300	1,200
- Non-chronically homeless	3,145	3,000	3,000	3,000
# of homeless individuals (affiliated with San Jose) who secured new permanent housing:				
- Chronically	290	350	350	400
- Non-chronically	1,393	1,100	1,300	1,500
# of homeless individuals assessed for permanent housing:				
	N/A <sup>1</sup>	N/A <sup>1</sup>	N/A <sup>1</sup>	1,000

<sup>1</sup> This measure was established in 2019-2020 Operating Budget and data for 2017-2018 and 2018-2019 are not available.

<sup>2</sup> This number is collected on a biennial basis.






# Housing Department

## Performance Summary

### Neighborhood Capital Investment and Public Services

#### Performance Measures

	2017-2018 Actual	2018-2019 Target	2018-2019 Estimated	2019-2020 Target
 % of CDBG-funded projects meeting all stated outcomes: - City projects - Non-City projects	80%	90%	90%	90%
 % of CDBG invoices processed within 30 days of receipt of all required documentation	85%	90%	90%	90%
 % of CDBG contracts completed by July 1	0% <sup>1</sup>	50%	0% <sup>1</sup>	50%

<sup>1</sup> Due to delays in the Federal budget process, no contracts were completed by July 1.

#### Activity and Workload Highlights



	2017-2018 Actual	2018-2019 Forecast	2018-2019 Estimated	2019-2020 Forecast
# of rehabilitation projects completed:				
- Rehabilitation projects	0	12	1	6
- Minor repair	463	350	350	375
Total	463	362	351	381

# Housing Department

## Performance Summary

### Rent Stabilization and Tenant Protection

#### Performance Measures

	2017-2018 Actual	2018-2019 Target	2018-2019 Estimated	2019-2020 Target
 % of tenant/landlord mediations that resulted in mutual agreement	71%	90%	82%	90%
 % of cases resolved within 60 days of completed petition date	N/A <sup>1</sup>	N/A <sup>1</sup>	N/A <sup>1</sup>	90%

<sup>1</sup> This measure was established in 2019-2020 Operating Budget and data for 2017-2018 and 2018-2019 are not available.

#### Activity and Workload Highlights

	2017-2018 Actual	2018-2019 Forecast	2018-2019 Estimated	2019-2020 Forecast
# of unduplicated mobilehome and apartment clients served by the Rent Stabilization Program	5,618	4,000	4,600	5,100
Average number of days from completed petition to resolution	N/A <sup>1</sup>	N/A <sup>1</sup>	N/A <sup>1</sup>	45 days

<sup>1</sup> This measure was established in 2019-2020 Operating Budget and data for 2017-2018 and 2018-2019 are not available.

# Housing Department

## Departmental Position Detail

Position	2018-2019 Adopted	2019-2020 Adopted	Change
Account Clerk I	1.00	1.00	-
Accountant II	1.00	1.00	-
Accounting Technician	1.00	1.00	-
Administrative Assistant	1.00	1.00	-
Administrative Officer	1.00	1.00	-
Analyst I/II	16.00	17.00	1.00
Building Rehabilitation Inspector I/II	3.00	3.00	-
Building Rehabilitation Supervisor	1.00	1.00	-
Community Coordinator	0.00	2.00	2.00
Community Programs Administrator	1.00	1.00	-
Community Services Supervisor	1.00	0.00	(1.00)
Deputy Director	2.00	2.00	-
Development Officer	10.00	10.00	-
Development Specialist	5.00	5.00	-
Development Specialist PT	0.50	0.50	-
Director of Housing	1.00	1.00	-
Division Manager	3.00	3.00	-
Housing Policy and Plan Administrator	3.00	4.00	1.00
Information Systems Analyst	1.00	1.00	-
Office Specialist II	4.00	3.00	(1.00)
Public Information Manager	1.00	1.00	-
Public Information Representative II	2.00	2.00	-
Senior Accountant	1.00	1.00	-
Senior Analyst	2.00	2.00	-
Senior Development Officer	7.00	8.00	1.00
Senior Systems Applications Programmer	1.00	1.00	-
Staff Specialist	6.00	7.00	1.00
Student Intern PT	1.00	1.00	-
<b>Total Positions</b>	<b>77.50</b>	<b>81.50</b>	<b>4.00</b>

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