
MEETING SUMMARY

Anti-Displacement Technical Advisory Committee

Meeting #4 - Thursday, June 25th, 2021

1:00 pm – 2:30 pm via Zoom

The City of San José hosted the fourth Technical Advisory Committee (TAC) meeting as part of the City’s Anti-Displacement Working Group. This group is tasked with offering input on the design of a realistic Community Opportunity to Purchase program that balances the needs and desires of tenants, property owners, brokers, realtors, and housing advocates. A copy of the PowerPoint can be found [here](#).

Attendance

Close to 20 community leaders from diverse sectors attended the meeting. Among those invited included housing advocates, property owners, affordable and market rate developers, philanthropic leaders, realtors, community-based organizations, and business leaders.

Baird + Driskell Community Planning facilitated the meeting with assistance from the City of San José Housing Department staff. These notes were prepared by Baird + Driskell.

Introduction

Following a welcome and introductions, participants heard a recap of previous discussions and the plan for future topics.

Roles and Responsibilities

Partnership for the Bay’s Future (PBF) Challenge Grant Fellow with the City of San José, provided context on how other cities approach the requirements for nonprofits that want to participate in COPA programs. He also talked about the existing nonprofit landscape in San José and the City’s concern that there is very limited number of groups that have *both* strong local connections and significant development experience. He then presented a proposal for a potential two-part system for nonprofits and asked for input. Under the proposal, there would be two different types of organizations:

- 1) Qualified Nonprofits (QNP) - The purchasing entity responsible for securing financing, managing renovations, and overseeing a property’s financial stability; and
- 2) Community Partners – The local partner responsible for tenant education, outreach, and community relations.

TAC participants were generally receptive to this proposed two-part framework, with no one raising any objections.

Qualified Nonprofits

PBF Fellow presented information about potential criteria for QNPs. Specifically, he suggested three categories:

- **Able to purchase** - Able to qualify for financing to purchase property.
 - Experience with production or rehabilitation of similar buildings in recent years
 - Adequate financial strength
- **Nonprofit** – Incorporated as a nonprofit organization
- **Mission-driven** - A demonstrated dedication to:
 - Long-term affordable housing
 - Asset management that keeps residents in place
 - Racial equity
 - Preventing homelessness and/or displacement

Staff paused here to take questions and comments regarding the two-part system. Participants were generally supportive and shared the value they saw in it. Some participants brought up questions regarding the timeline for the formation of these partnerships, how the City will evaluate eligible QNPs and community partners, and questions about other technical details.

Community Partners

San José staff presented more context on community partners. Attendees participated in an activity to share their thoughts on the value of community partners and to offer potential criteria. Participants were divided into four small groups and discussed the following:

1) Why is it important to have a community partner? Consider what benefits it adds to the program and transaction process. Below is a summary of key points:

- **Existing relationships** - Community organizations typically have deep existing relationships with residents, especially if they are neighborhood-based organizations.
- **Trust** - A community partner is in a better position to build trust with residents due to the nature of their mission-driven work and connection to community members.
- **Cultural competency** - A community partner organization whose staff, leaders, and/or volunteers reflect the San José community can engage and communicate with tenants in a culturally competent way. This includes providing information in whatever languages are spoken by residents.
- **Tenant empowerment** - By offering tenant support and education about their rights under the COPA process, a community partner is well-positioned to help tenants feel empowered and create opportunities for organizing.

- **Capacity-building** - Partnering with a larger organization can expand a community organization's capacity and position them to become an affordable housing developer in the future.

2) What are the appropriate criteria to be a community partner? Participants were asked to help the City of San José draft criteria for community partners. Sample categories included tenant engagement, community control, local commitment, capacity to participate, mission-driven, and other. Below is a summary of key points:

- **Tenant engagement**
 - A record of working with tenants and supporting them as they organize.
 - Commitment to building tenant capacity towards ownership.
- **Community control**
 - Commitment to democratic control.
 - Consider prioritizing organizations with a community governance structure (e.g. local residents have seats on the Board of Directors).
- **Local commitment**
 - Prioritize neighborhood-based organizations, including neighborhood associations.
 - Prioritize organizations based in San José.
- **Capacity to participate** (experience, time availability)
 - Consider time, staff capacity and availability to dedicate to the Community Partner role.
 - Consider knowledge and experience in asset building, homeownership counseling, related services.
 - Evaluate the organization's plans and their future capacity to play this role 5 or 10 years from the purchase.
- **Mission-driven**
 - Consider the organizations mission and commitment to equity and inclusion.
 - Evaluate if the organization has a history of housing-related work.
 - Evaluate for a demonstrated commitment to low-income populations.
 - Review the organization's by-laws and articles of incorporation to determine their commitment to the community.
- **Other**
 - If the organization is new, have increased scrutiny about their ability to engage with the community.



Several participants felt it would be important for the City to not be overly prescriptive with the criteria in order to provide flexibility or creativity in the relationship between community partners and QNPs.

After the small group discussion, the full group reconvened and a representative from each breakout room shared the thoughts and criteria. The facilitator synthesized these points in real-time on a spreadsheet viewable to the full group.

Next Steps

The next TAC meeting is scheduled for Thursday July 22nd from 1:00 - 2:30 pm via Zoom.