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# MEETING SUMMARY

## Anti-Displacement Technical Advisory Committee

Meeting #6 - Friday, Sep 10<sup>th</sup>, 2021

1:00 pm – 2:30 pm via Zoom

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The City of San José hosted the sixth Technical Advisory Committee (TAC) meeting as part of the citywide 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

Over 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.

The meeting was facilitated by Baird + Driskell Community Planning with assistance from the City of San José Housing Department staff.

### Introduction

Following a welcome and introductions, the facilitator revisited the ground rules the group established previously at the first TAC meeting. The facilitator also summarized previous discussions and the plan for future topics (i.e., education and outreach, and the draft framework).

### Tenant Engagement

Partnership for the Bay's Future Challenge Grant Fellow with the City of San José presented information about the goals of tenant engagement and how it is managed in other cities. Participants were then placed into small groups to discuss the following questions:

### Question 1 – Pre-Purchase communication

- What should (pre-offer) tenant communication look like? (e.g., what activities/types of communication/frequency)
- How would QNPs reach out to/communicate with residents in order to gain support?

### Question 2 – Tenant support

- What say do tenants have in the support or vetoing of a sale?
- Should there be a target threshold of tenant support as part of a property acquisition?
- Should tenants be able to refuse/deny a QNP's attempt to purchase the property so it could be sold on the open market?

Some themes from the discussion are summarized below with full notes in the appendix.

- **Find an appropriate time for potential buyer outreach** – Questions emerged as to when would be the appropriate time for a potential buyer to outreach to tenants; whether it should be after a QNP submits a letter of interest or after an offer has been accepted.
- **Community partners are an important component to this process** – Particularly to support appropriate outreach and build relationships with tenants.
- **Respect tenants' privacy** – It is important to find a way to allow for communication between a potential buyer and tenants while being sensitive to their privacy. Landlords feel a responsibility to respect their tenants' privacy.
- **Tenant empowerment and organizing** – Tenant advocates felt a comprehensive COPA policy should support tenant organizing and empower tenants to know and assert their rights.
- **Tenants may want to disrupt the process** – A minority opinion was that tenants may be reluctant to engage with a potential buyer or community partner or refuse to communicate with them all together as a way to prevent the sale of the property.

Many additional themes were shared at the following Stakeholder Advisory Committee meeting which covered the same topics. For example:

- **Renters' application provides some information** – For the purpose of income verification, renter's application may be a good starting point, though the information often becomes less accurate over time.
- **Provide information throughout the process** – Be sure to have a way to follow up with tenants so they know if the offer was accepted or refused.

Below are repeated themes that emerged from both meetings:

- **Process does not need to be overly complicated** – Nonprofits should be able to ask for more information and tenants should be informed about the process, but it doesn't have to be complicated. Further, a drawn-out process could affect timelines and slow down a sale.
- **Provide appropriate information** – It is important to provide tenants comprehensive information in a variety of ways including in person (e.g., doorknocking, tenant meetings), printed, and as needed, such as having a key contact call with questions.
- **No tenant veto authority** - The general consensus was that tenants should not have a veto authority over the sale to a nonprofit.

## Ownership

Challenge Grant Fellow presented information about homeownership trends in San José as well as a variety of ownership models. He also explained how COPA can be used to promote ownership and potentially different types of long-term stability models.

Participants returned to their small groups to discuss the following questions:

- Why is ownership important? What elements of ownership are most important to you? (E.g. wealth-building, stability, control, etc.)
- Knowing there will be resale restrictions that limit equity, does that change your thoughts on ownership?

Some participants felt ownership offers unique benefits such as wealth building, stability, control, and respect. Though there wasn't a general consensus about how much COPA should emphasize ownership, many felt that COPA should be flexible and provide avenues toward ownership or wealth-building with different long-term stability models because conventional homeownership is so out of reach for many. These alternative models have the benefit of some wealth-building while maintaining affordability for future residents. One group expressed particular interest in a rent to own model. A minority opinion expressed concern about high costs and property taxes and lower-income residents' ability to take them on.

## Next Steps

The next TAC meeting is scheduled for Thursday, September 30<sup>th</sup>, from 11:00 - 12:30 pm via Zoom.