MONTEREY COUNTY
HOUSING ADVISORY COMMITTEE AGENDA
Wednesday, September 14, 2016, 5:00 p.m. – 6:30 p.m.
Monterey County Government Center, Monterey Room, 2nd Floor
168 West Alisal Street, Salinas, CA

1) Call to Order

2) Public Comment:
The Housing Advisory Committee will receive public comment on items not listed on the agenda within the purview of the Housing Advisory Committee. The Chair may limit the length of individual presentations.

3) Approval of Meeting Minutes
April 20, 2016 pending

4) Old Business:
a. Received a presentation on the Paseo De La Rosas project (currently known as the Castroville Farm Labor Center) from the Monterey County Housing Authority Development Corporation on Wednesday July 13, 2016. A recommendation from the HAC is requested in compliance with the Inclusionary Housing Ordinance and forward to the Planning Commission and Board of Supervisors.

5) New Business:
a. Receive a report on the Inclusionary Housing Rental Monitoring Program and provide input on it.
b. Receive the final Housing Element adopted by the Board of Supervisors on 1/26/16.
c. Receive the Annual Housing Element Progress Report for 2015 as approved by the Board of Supervisors on 4/19/16.
d. Receive the CDBG Annual Action Plan as approved by the Board of Supervisors on 5/10/16 and by HUD on 6/30/16.
e. Receive the CDBG Amended Consolidated Plan as approved by the Board of Supervisors on 6/21/16.

6) Updates
None

7) Committee Member Reports
Committee members will report on matters, events and activities as related to HAC goals and advocating for housing.

8) Additions to Future Agendas
Committee members may give direction regarding future agenda items.

9) Schedule of Upcoming Meetings
September 14, 2016
November 9, 2016

10) Adjournment
The Chair will adjourn the meeting.

Individuals with a disability who require a modification or accommodation (such as auxiliary aids or services) in order to participate in the public meeting may make these requests to the Economic Development Department by calling (831) 755-5390.
HOUSING ADVISORY COMMITTEE MINUTES

Monterey County Administration Building
Monterey Room
168 W. Alisal Street, Salinas, CA

Wednesday, April 20, 2016, 5:00 PM

Members Present: Ignacio “Mog” Cabatu, Sabino Lopez (late), Margaret Robbins, Wayne Ross, Mark Trabing, and La’Quana Williams

Members Absent: Karen Araujo

Staff Present: Jane Barr, Jose Jimenez, Anita Nachor
Luke Connolly and John Ford (Planning)

Others Present: Dale Agron, John Anzini, Derek Beyer, Paul Byrne, Matt Locati, Capri Roth, Eric Sand, Alan Williams, and Jacqui Zischka

1. Call to Order:
   Mr. Cabatu called the meeting to order at 5:03 p.m.

2. Public Comment:
   Mr. Cabatu asked for public comment on items not on the agenda, but there was none.

3. Approval of the March 9, 2016 Meeting Minutes:
   Action: A motion was made by Ms. Robbins to approve the March 9, 2016 minutes. Mr. Trabing seconded the motion.

   VOTES:
   AYES: Cabatu, Robbins, Ross, Trabing, and Williams
   NAYS: None
   ABSENT: Lopez
   ABSTAINED: None
   The motion passed unanimously with one absent

4. Old Business:
   a. Adopt a resolution informing the Board of Supervisors and Planning Commission of the Housing Advisory Committee’s recommendation in regard to the Rancho Canada Village project.

   Jane Barr reported that a different title was on the March 9, 2016 agenda versus that in the staff report. In an abundance of caution in regard to the Brown Act, the item was brought back to the Housing Advisory Committee to confirm the action taken at the last meeting.
**HOUSING ADVISORY COMMITTEE MINUTES**

Monterey County Administration Building
Monterey Room
168 W. Alisal Street, Salinas, CA

Wednesday, April 20, 2016, 5:00 PM

*Action: A motion was made by Mr. Trabing to adopt a resolution in regard to the Housing Advisory Board’s recommendation on the Rancho Canada Village project. Ms. Robbins seconded the motion.*

**VOTES:**
- **AYES:** Cabatu, Lopez, Robbins, Ross, Trabing, and Williams
- **NAYS:** None
- **ABSTAINED:** None

*The motion passed unanimously*

5) **New Business:**
   a. Receive a presentation on the Carmel Casitas Affordable Housing Development project from the Applicant and make a recommendation on Inclusionary Housing Ordinance compliance to the Planning Commission and Board of supervisors.

   John Ford, planning, reported that the Carmel Casitas Affordable Housing Development project is not on file with the planning department. The prospected applicants requested to present information in order to get feedback from the Housing Advisory Committee on their potential development. John Anzini and Paul Byrne, developers, presented the project and answered questions. A discussion followed.

6) **Updates:**
   None

7) **Committee Member Reports:**
   Committee members will report on matters, events and activities as related to HAC goals and advocating for housing.
   None

8) **Additions to Future Agendas:**
   Committee members may give direction regarding future agenda items.
   a. (continued from March 9, 2016)
      Discuss the Process on Rental Housing Monitoring

9) **Schedule of Upcoming Meetings**
   May 11, 2016: (Cancelled)
   July 13, 2016: Regular quarterly meeting
   September 14, 2016: Regular quarterly meeting
   November 9, 2016: Regular quarterly meeting

10) **Adjournment:**
Wednesday, April 20, 2016, 5:00 PM

Action: Ms. Robbins moved to adjourn the meeting and the motion was seconded by Mr. Cabatu. The meeting was adjourned at 5:55 PM.
MONTEREY COUNTY HOUSING ADVISORY COMMITTEE

RECOMMENDATION:
It is recommended that the Housing Advisory Committee (HAC) receive a presentation on the Paseo de las Rosas project from the Monterey County Housing Authority Development Corporation.

DISCUSSION:
Overview:
In 1972, the Housing Authority of Monterey County (HACM) constructed 48 units of farmworker housing on two sites in Castroville. In 2002, the County made two loans totaling $376,000 to HACM to rehabilitate the units. The project has reached the end of its economic life.

The project will be sold to an affiliated limited partnership. The Monterey County Housing Authority Development Corporation (HDC) will be the Managing General Partner of the limited partnership. HDC is proposing to demolish the existing units and replace them with 54 new units, six more units than existing. Fifty two (52) of the new units will be restricted for use as farmworker housing at affordable rates ranging from 30% to 60% of the Area Median Income. HDC has requested that the County modify the terms of its outstanding loans to comply with other financing requirements.

If the project receives an award of California Tax Credits and USDA and first permanent loans are secured, the project could begin construction in late 2016 and be completed by early 2018.

Description of the Project
HDC is proposing to tear down and rebuild the Castroville Farmworker Housing development, located on two sites at Speegle & Haight and Pajaro & Seymour Streets in Castroville. The development is 44 years old and has reached the end of its physical life. While the rehabilitation financed with County loans extended the life of the project from 30 to 44 years, the original construction does not warrant investing further funds.

With assistance from the County through two zero-interest loans, the units were rehabilitated in 2002. The HOME loan of $341,000 currently has a balance of $180,252.73 and is scheduled to be paid off in July 2032. The CDBG loan of $35,000 currently has a balance of $12,250 and is scheduled to be paid off in July 2022. Both loans restrict rent to be affordable to farmworkers who are income qualified at very low and low incomes.

HDC is submitting an application to the California Tax Credit Allocation Committee (CTCAC) for the final funding needed to construct 54 units on the two sites. CTCAC approves awards of federal tax credits issued by the State that provide for equity investments by limited partnerships in affordable housing projects. HDC is seeking a loan from the U.S. Department of Agriculture (USDA) and is seeking a conventional loan for the property which will be in first position.
To secure financing for the project, the outstanding County loans must be subordinated to both the conventional first loan and the proposed USDA loan, as well as existing USDA loans, and must meet CTCAC’s required affordability term of 55 years from Certificate of Occupancy. Thus, to support the project, the County must extend the term of its loans and subordinate them to the first and USDA loans. Further, CTCAC requires that the source of repayment of the County’s loan be limited to “residual receipts” from project cash flow. Residual receipts equals cash flow remaining after payment of the conventional, first loan and USDA loans, as well as other allowable property expenses. HDC has agreed to pay 50% of the residual receipts to the County, annually, so that its loans will be paid off in a timely manner. Moreover, HDC will pay 3% interest on the County loans, which are currently 0% interest.

HDC has asked the County to amend its existing loan terms to meet CTCAC and lender requirements. HDC has also asked for a Board resolution supporting the project and a Commitment Letter, as required by CTCAC. The Commitment Letter from the County must evidence its willingness to agree to new loan terms to meet CTCAC requirements.

As noted, the County will receive 50% of residual receipts from the properties until its loans are repaid. Based upon residual receipts projections provided by HDC and reviewed by County staff, the County loans are estimated to be paid within four years after construction completion, projected to be 2022. This date is ten years earlier than the current HOME loan term and equal to the CDBG loan term. However, there are no guarantees that there will be sufficient cash flow in any of the years during the term of the loans, which could delay repayment beyond the 40 year term of the USDA loans and up to the 55 year loan term from Certificate of Occupancy.

Although there could be some delay in repayment of the County loans, County staff recommends support of the project in order to improve the availability and quality of farmworker housing in the County. If and when HDC successfully secures a tax credit allocation from the CTCAC, and if it otherwise successfully secures financing for the project, County staff will prepare documents implementing changes to the outstanding County loans, as well as assumption and assignment documents, and will bring them to the Board for approval.

**Compliance Requirements:**
Currently, the County restrictions on the units are: 7 units at Very Low Income (50% of the Area Median Income (AMI)) and 37 units at Low Income (24@ 60% AMI, 4 units at 65% AMI, and 9 units at 80% AMI). Proposed affordability at the new development will exceed the current requirement of affordability with 38 units at Very Low income (30% to 50%) and 14 units at Low income (60%). This exceeds the inclusionary ordinance requirement of 22 units (20% of the total development).

**STAFF RECOMMENDATION:**
It is recommended that the HAC receive the presentation and provide input.

Prepared by:

**David L. Spaur**
David L. Spaur, CEcD, EDFP
Economic Development Director
MONTEREY COUNTY HOUSING ADVISORY COMMITTEE

MEETING: September 9, 2016               AGENDA NO.: 5a
SUBJECT: Receive a report of the Inclusionary Housing Rental Monitoring Program and provide input on it.
DEPARTMENT: Economic Development Department

RECOMMENDATION:
It is recommended that the Housing Advisory Committee (HAC) receive a report on the Inclusionary Housing Rental Monitoring Program and provide input on it.

DISCUSSION:
Background:
The County’s Inclusionary Housing Ordinance was approved on October 28, 1980 and has been amended nine times since then, the last being on April 26, 2011. The Administrative Manual provides procedures for administering the Ordinance and was last updated July 12, 2011. Part of the Administrative Manual requires the monitoring of units to make sure that they comply with the Ordinance. For sale units are required to be monitored annually. Owners are required to submit a certification of owner-occupancy and a copy of their utility bill as further proof that they are occupying the unit. Additionally, a copy of their Declarations page of their insurance policy as proof that they are maintaining it as required in the Inclusionary Agreement.

In regard to monitoring of rental units, the Administrative Manual cites the following:

“A. Monitoring Procedures: Rental Properties

General Policies:
Rental projects developed under the Inclusionary Program are monitored every two years to determine compliance with the terms of the Regulatory Agreement recorded against the property. The areas to be included in the monitoring process include tenant incomes and rents, payment of property taxes and hazard insurance and review of the terms of the leases.

An annual certification of ownership is required. The rent schedule for the Inclusionary Program will be provided to the owner with the certification request.

Procedures:
1. A Monitoring Review Form is initiated for each project. The terms of the Inclusionary Agreement are verified and the rent and occupancy limits are noted on the form.

2. Initial letters are mailed to property owners requesting completion of certifications regarding non-discrimination policies, names and incomes of tenants and the household size, rents charged, and ownership status. Copies of Income Guidelines and Rent Schedules appropriate for the development will be included in the mailing. The owner is instructed to give the tenants a form entitled Tenant Income Verification for completion. These forms are to be returned along with documentation of hazard insurance and copies of current leases.

3. Second Notices are sent by certified mail if the property owner does not respond within fourteen business days.

4. Correspondence will be sent by the sheriff’s office, process server, delivery service or hand delivered to the address by a staff member if the property owner fails to respond in a timely manner to the second notice or if mail has been refused or returned as undeliverable. Owners
who fail to respond within seven business days will be referred to County Counsel for further action.

5. Assessors Office records will be reviewed to verify current ownership and mailing addresses where appropriate.

6. Failure to cooperate with the monitoring review process will be considered a breach of the Inclusionary Agreement and the Regulatory Agreement. County Counsel will be notified of any such breach in order that legal remedies may be initiated.

7. The income guidelines of the Section 8 Program are utilized by Redevelopment and Housing Office staff for the monitoring review.

8. Staff will review information provided by the owner and tenants to determine compliance with the Inclusionary Agreement and Regulatory Agreement as it pertains to allowable rents, number of restricted units, current income of tenants and any further restrictions on occupancy specified in the Agreement.

9. The review of rent affordability will include the standards set forth in the Inclusionary Agreement for each individual project.

10. Leases are reviewed to determine if non-discrimination policies and prohibitions against subletting are included.

11. If there are discrepancies between the statements of the owner and tenant, additional documentation will be requested.

12. Payment of hazard insurance in an amount sufficient to replace the structures shall be verified.

13. A letter will be issued to the property owner addressing any compliance issues. The letter will specify a corrective action deadline. In general, a 30-day period will be adequate.

14. When a property has changed ownership without notice to the County and this information becomes known at the time of the monitoring review, staff will schedule an appointment with the new owner to discuss the provisions of the Inclusionary Agreement. Current Rent Schedules and Income Guidelines will be provided.

15. The Monitoring Review Form will be completed. The Inclusionary Housing database will be updated to reflect compliance or non-compliance.

16. Other County offices may be alerted when the monitoring review reveals code violation or dangerous situations.

17. Every effort will be made to provide owners and tenants with the appropriate information to ensure a successful monitoring resulting in full compliance with the Inclusionary Housing Program. However, referrals will be made to County Counsel because of failure to cooperate or non-compliance.”

**Status of Program:**
The Inclusionary Housing Program required by the Ordinance is administered by the Economic Development Department. There are approximately 48 rental projects with a total of 413 units. This represents an increase of three projects and 123 units in the early part of this decade due to the addition of the Cynara Court and Sea Garden projects in Castroville and Manzanita Place project in East Garrison.
Recent compliance monitoring shows that approximately 83% of the projects responded to the monitoring. Staffing over the last four plus years has limited the ability to pursue full compliance in regard to monitoring. Staff would appreciate hearing concerns of owners in regard to the process so that we may clarify and streamline the process as much as is allowed by the Administrative Manual.

STAFF RECOMMENDATION:
Staff recommends that the HAC receive the report and provide input.

Prepared By:

David L. Spaur
David L. Spaur, CEcD, EDFP
Economic Development Director
February X, 2016

Re: Inclusionary Rental Property at:

Dear Ms./Mr.:

Our records indicate that the rental property located at the address above is subject to an Agreement Imposing Restrictions on Real Property either through the County’s Inclusionary Housing or other County affordable housing programs. To ensure compliance with the terms of these agreements, units are monitored on an annual basis.

Under the terms of your Agreement, ___ units have rent limitations. According to the terms of your agreement: ___ must be rented to households earning no more than 50% of the County’s median income; ___ must be rented to households earning no more than 80% of median income; and ___ must be rented to households earning no more than 120% of the County median income. Depending on your tenants’ move-in date, Rental & Income Limits for both 2014 and 2015 are enclosed for your convenience. Per your Agreement, you must ensure that your tenant’s gross annual income and their rent at the time of move-in and annually thereafter do not exceed the maximum shown on the Rental & Income Limits for the applicable year.

Please fill out all enclosed forms in their entirety within fourteen (14) days of the date of this letter, and return them to the County at the following address:

Attention: Monterey County Economic Development Department
Attention: Housing Programs Manager
168 W. Alisal 3rd Floor
Salinas, CA 93901

An instruction sheet (Attachment A) and the annual project compliance documents are attached to help you collect the required information. You may also download electronic copies of these documents from the Economic Development Department’s website:

http://www.co.monterey.ca.us/EconomicDevelopment/housing-documents.shtml
For further information, or if you have any questions, please call the Office of Housing and Redevelopment at (831) 755-5390.

Sincerely,

Jane Royer Barr
Housing Programs Manager

Enclosures:  Attachment A – Annual Monitoring Instructions
             Rental Owner Certification
             Annual Project Compliance Report
             Tenant Income Verification (English and Spanish)
             2015 Rental & Income Limits
             Housing Authority Utility Allowances

Si necesita ayuda en Español, llame al (831) 755-5390.
ATTACHMENT A
Annual Monitoring Instructions
Inclusionary Rental

1. Rental Owner Certification Form
This document is to be completed by the property owner or manager. It is intended to verify all of the information submitted is true and accurate. Fill out the requested information regarding the tenants and sign and date the form.

2. Annual Project Compliance Report:
This document is to be completed by the property owner or manager. This is a summary of all of the information about income restricted units. The top portion of this report contains basic information on the rental property, including the number of units that are income restricted for occupancy. The table portion of the report allows the preparer to provide specific information on each unit. The lower portion of the report contains reminders about required supporting documentation and a place for the owners/agents to sign the report.

- Column “C” – Cite which income category at which the unit is restricted.
  - Property owners may rent to a household earning less than the restricted income limit, e.g. a 50% income household could rent a unit restricted to 80% of Area Median Income.
  - The total units rented by category must agree with the summary information on the top portion of the report.
- Column “F” – Cite the start date of your tenant’s current lease or the original lease date if the tenant is on a month-to-month basis after the initial lease term ended.
- Column “G” – Cite your tenant’s annual gross income
  - Caution: Tenant Income Verification form cites the tenant’s monthly gross income.
- Column “H” – Calculate this amount by dividing the figure in Column G by the appropriate median income shown on Table II, Maximum Household Income Limits (Annual), of the attached 2015 Rental & Income Limits form.
- Column “L” –
  - If utilities are NOT included in monthly rent, please circle the monthly dollar allowances for tenant paid utilities on the attached Housing Choice Voucher Program, Allowances for Tenant-Purchased Utilities & Other Services, write in a total amount at the bottom of the page, and enter the amount into Column L.
  - If utilities are included in the monthly rent, enter 0 and write “included in rent” on the Housing Choice Voucher Program, Allowances for Tenant-Purchased Utilities & Other Services form.
  - Return the Housing Choice Voucher Program, Allowances for Tenant-Purchased Utilities & Other Services form with the rest of your monitoring materials.
- Column “N” – Cite the maximum monthly rent from Table I of the attached 2015 Rental & Income Limits form.
  - Column “M” cannot exceed Column “N”.

3. Tenant Income Verification Form:
Please make sure to submit this information for each person living in the Inclusionary rental units. Please notify your tenants that the form is for their gross monthly income, not their net or annual income.
income. Property owners are responsible for ensuring that their tenants fill out this form correctly and in its entirety. Please make sure your tenants list all occupants and their ages on this form. A signed copy of this form should be included for each unit. Copies of the form in English and Spanish are enclosed. No white-out or correction tape is accepted on this form.

4. **Copies of Current Leases:**
Please submit a complete lease for one tenant residing in one of the units subject to this review. Additionally, please submit the cover and signature page for all tenants. If the cover page does not indicate the rent and term, please submit those pages as well.

If you have previously submitted this information and the unit has not turned over since your last report to us, you do not need to resubmit this information.

5. **Copy of the Current Insurance Policies:**
Please submit the declarations page, binder, or other documentation of liability and property insurance coverage on this property (include flood insurance documentation if required).

6. **Evidence of Paid Property Taxes:**
Please submit a copy of your cancelled check made out to the “Tax Collector” or a copy of your receipt.
MONTEREY COUNTY HOUSING PROGRAM

RENTAL OWNER CERTIFICATION

1. ____________________________, is the owner of rental property located at ___________________________. ____________________________ units at this address are restricted to low / very low / moderate income household under the Monterey County Housing Program.

2. I currently charge the following rents:

<table>
<thead>
<tr>
<th>Unit #/Address</th>
<th>Name of Tenant(s)</th>
<th>Gross Monthly Rent</th>
<th>Utility Allowance</th>
<th>Net Rent</th>
<th>No. of Bedrooms</th>
<th>No. persons in household</th>
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3. I have enclosed with this certification evidence of paid property taxes and hazard insurance for the rehabilitated property.

4. I have enclosed copies of current leases.

5. I have enclosed the signed Tenant Income Verification Form completed by each tenant for each unit and a copy of their utility bill (if tenant pays).

I CERTIFY THAT THE INFORMATION PROVIDED ABOVE IS TRUE AND ACCURATE TO THE BEST OF MY KNOWLEDGE. I AM AWARE THAT THERE ARE PENALTIES FOR WILLFULLY AND KNOWINGLY GIVING FALSE INFORMATION. PENALTIES FOR FALSIFYING INFORMATION MAY INCLUDE THE COUNTY EXERCISING ITS OPTION IN ACCORDANCE WITH YOUR RecordED AGREEMENT AND/OR PROSECUTION UNDER THE LAW.

Signed ____________________________ Date ____________________________

Signed ____________________________ Date ____________________________
County of Monterey
Housing Programs

1. Name of Head of Household: ____________________________________________

2. Daytime Telephone Number: ____________________________________________

3. Address of Rental Property: ____________________________________________

4. Number of Occupants ____________________________________________
   Age of dependents: ____________________________________________

5. Do you receive Section 8 or Housing Choice Vouchers? ( )Yes ( )No

**MONTHLY INCOME SOURCES**
(Include income of all people in your household over the age of 18)

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<tr>
<th>Name</th>
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<tbody>
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<td>Salary</td>
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<td>Social Security</td>
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<td>TANF/Welfare</td>
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<td>Pensions</td>
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<tr>
<td>Other</td>
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Total Monthly Income: ____________________________

6. Name(s) of Company(ies) where employed: ____________________________________________
   Address and Phone Number of each place of employment: ____________________________
   ____________________________

7. I currently pay $________________ of rent per month. This amount includes utilities. (Y/N).
   I pay ____________________________ (e.g. water, electricity, garbage, sewage etc.)

8. Tenant Certification and Authorization: I/We certify that the stated information is correct and complete. I/We authorize the property owner, and/or its agents, to solicit and obtain verification of my/our income.

   Date ________________
   Sign __________________
   Date ________________
   Sign __________________

**FOR STAFF USE ONLY**

Gross Annual Income $____
Unit Income Limit/TGI per Regulatory Agreement
Fair Market Rent for Bedroom # ____________________________

30% of Median ________________
Condado de Monterey  
Programas de Viviendas

Verificación de Ingresos del Inquilino

1. Nombre(s) del(os) inquilino(s):

2. No. de Teléfono durante el Día:

3. Domicilio de la Propiedad que Renta:

4. Número de Dependientes:_________  Edad del los Dependientes:______  ______  ______

5. ¿Su hogar recibe subsidio para renta de la Sección 8? ( )Sí ( )No

**FUENTE DE INGRESO MENSUAL**  
(Incluya los ingresos de todas las personas en su hogar mayores de 18 años de edad)

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<th>Nombres</th>
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<td>Salario y sueldo</td>
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<td>Seguro Social</td>
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<td>TANF/Welfare</td>
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<td>Pensiones/Anualidades</td>
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</table>

6. Nombre(s) de Compañía(s) donde trabaja(n):

Domicilio y Número de Teléfono para cada Compañía:

7. Estoy pagando $____ por mes de renta. Esta cantidad incluye/no incluye empresas de servicios públicos. Pago por ____________________________(e.g. agua, luz, basura, etc.)

8. Certificación y Autorización de Inquilino(s): Yo/Nosotros certifico(amos) que la información y declaraciones antedichas son verdaderas, ciertas y completas. Yo/Nosotros autorizo(amos) a los dueños de la propiedad, o sus agentes, que soliciten y obtengan verificación de mi/nuestros ingresos.

Fecha

Fecha

Firma

Firma
Annual Project Compliance Report

This report is to be completed by the project owner or manager for all projects that have received County or Redevelopment Agency assistance, including the County Inclusionary Housing Program.

Owner Name: ____________________________

Project Name: ____________________________

Total # of Restricted Units: ____________________________

# of Units Restricted to 50% of AMI ____________________________

# of Units Restricted to 60% of AMI ____________________________

# of Units Restricted to 70% of AMI ____________________________

# of Units Restricted to 80% of AMI ____________________________

# of Units Restricted to 100% of AMI ____________________________

# of Units Restricted to 120% of AMI ____________________________

Prepared By: ____________________________

Contact Information: ____________________________

Date Prepared: ____________________________

1. ____________________________ is/are the owner/agent of rental property located at ____________________________.

2. The following table accurately represents compliance with the requirements of the applicable Loan Agreement or Inclusionary Developer Agreement I/we executed with the County of Monterey or the Redevelopment Agency of Monterey County.

<table>
<thead>
<tr>
<th>Unit #</th>
<th>A.</th>
<th>B.</th>
<th>C.</th>
<th>D.</th>
<th>E.</th>
<th>F.</th>
<th>G.</th>
<th>H.</th>
<th>I.</th>
<th>J.</th>
<th>K.</th>
<th>L.</th>
<th>M.</th>
<th>N.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td># of Bedrooms</td>
<td>Unit AMI</td>
<td>Tenant Last Name</td>
<td>Initial Occupancy Date</td>
<td>Annual Gross Household Income</td>
<td>Household Income as % of AMI</td>
<td>Tenant Share of Rent</td>
<td>Rent Subsidy (e.g., Section 8)</td>
<td>Monthly Rent You Receive (F11)</td>
<td>Utility Allowance</td>
<td>Tenant Housing Cost (F2-L)</td>
<td>Maximum Rent Allowed</td>
<td></td>
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</tbody>
</table>

U:\294-ERP\Housing\Monitoring\Inclusionary (Rental) Monitoring\Rental\2016\Rental Monitoring Annual Project Compliance PhvO_Annual Project Compliance Report.doc
### Annual Project Compliance Report

This report is to be completed by the project owner or manager for all projects that have received County or Redevelopment Agency assistance, including the County Inclusionary Housing Program.

<table>
<thead>
<tr>
<th>A. Unit #</th>
<th>B. # of Rooms</th>
<th>C. Unit AMI</th>
<th>D. Tenant Last Name</th>
<th>E. # of Occupants</th>
<th>F. Initial Occupancy Date</th>
<th>G. Annual Gross Household Income</th>
<th>H. Household Income as % of AMI</th>
<th>I. Tenant Share of Rent</th>
<th>J. Rent Subsidy (e.g. Section 8)</th>
<th>K. Monthly Rent You Receive (T+1)</th>
<th>L. Utility Allowance</th>
<th>M. Tenant Housing Cost (T+1)</th>
<th>N. Maximum Rent Allowed</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

3. I/we have enclosed with this certification evidence of paid property taxes and liability and property insurance for the subject property.

4. I/we have enclosed copies of current leases for all new tenant leases for the subject units executed during the last calendar year.

5. I/we have enclosed copies of the Section 8, Allowances for Tenant-Purchased Utilities & Other Services with the appropriate amounts circled.

6. I/we have enclosed the signed Tenant Income Verification Form completed by each tenant for each unit and a copy of their utility bill (if tenant pays).

**I CERTIFY THAT THE INFORMATION PROVIDED ABOVE IS TRUE AND ACCURATE TO THE BEST OF MY KNOWLEDGE. I AM AWARE THAT THERE ARE PENALTIES FOR WILLFULLY AND KNOWINGLY GIVING FALSE INFORMATION. PENALTIES FOR FALSIFYING INFORMATION MAY INCLUDE THE COUNTY EXERCISING ITS OPTION IN ACCORDANCE WITH YOUR RECORDED AGREEMENT AND/OR PROSECUTION UNDER THE LAW.**

Signature

Date Signed

Signature

Date Signed
## MONTEREY COUNTY HOUSING 2015 RENTAL & INCOME LIMITS

### RENTAL UNIT

#### I. MAXIMUM MONTHLY HOUSING COST (Rent + Utility Allowance)

<table>
<thead>
<tr>
<th>State Rent Levels</th>
<th>Number of Bedrooms</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Studio 1</td>
</tr>
<tr>
<td>Very Low (50%)</td>
<td>835</td>
</tr>
<tr>
<td>Low/Lower (60%)</td>
<td>782</td>
</tr>
<tr>
<td>Low/Lower (70%)</td>
<td>889</td>
</tr>
<tr>
<td>Low (80%)</td>
<td>1,016</td>
</tr>
<tr>
<td>Median (100%)</td>
<td>1,270</td>
</tr>
<tr>
<td>Moderate (110%)</td>
<td>1,397</td>
</tr>
<tr>
<td>Moderate (120%)</td>
<td>1,524</td>
</tr>
</tbody>
</table>

*70% & 80% rents are only used for units with Inclusionary agreements approved prior to April 22, 2003.*

**From State MHP**

Rent are calculated at 30% of monthly income, adjusted for household size, by the State for 50, 60, & 80%.

If the tenant pays all or some of the utilities, the maximum rent above must be adjusted downward.
Using the attached utility allowance table, subtract the appropriate allowance for each tenant-paid utility.
The resulting number is the actual rent allowable to be paid by the tenant.

#### II. MAXIMUM HOUSEHOLD INCOME LIMITS (ANNUAL)

<table>
<thead>
<tr>
<th>State Income Levels</th>
<th>Number of Persons In Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Very Low (50%)</td>
<td>25,400</td>
</tr>
<tr>
<td>Low/Lower (60%)</td>
<td>30,480</td>
</tr>
<tr>
<td>Low/Lower (70%)</td>
<td>35,550</td>
</tr>
<tr>
<td>Low (80%)</td>
<td>40,600</td>
</tr>
<tr>
<td>Median (100%)</td>
<td>48,100</td>
</tr>
<tr>
<td>Moderate (110%)</td>
<td>52,900</td>
</tr>
<tr>
<td>Moderate (120%)</td>
<td>57,700</td>
</tr>
<tr>
<td>Workforce 1 (140% of Median)</td>
<td>67,350</td>
</tr>
<tr>
<td>Workforce 2 (180% of Median)</td>
<td>86,600</td>
</tr>
</tbody>
</table>

**Maximum Income Limits to Qualify Tenants:**
50% of Median Income for Very Low Units
80% of Median Income for Low Income Units
120% of Median Income for Moderate Income Units

t:\Housing\Affordability Tables\Affordability Tables 2015
MONTEREY COUNTY HOUSING 2014 RENTAL & INCOME LIMITS

RENTAL UNIT

I. MAXIMUM MONTHLY HOUSING COST (Rent + Utility Allowance)

<table>
<thead>
<tr>
<th>Income Level</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Low (50%)</td>
<td>630</td>
<td>675</td>
<td>810</td>
<td>935</td>
<td>1,043</td>
<td>1,043</td>
<td>1,043</td>
<td>1,043</td>
</tr>
<tr>
<td>Low/Lower (60%)</td>
<td>755</td>
<td>809</td>
<td>970</td>
<td>1,121</td>
<td>1,250</td>
<td>1,250</td>
<td>1,250</td>
<td>1,250</td>
</tr>
<tr>
<td>Low/Lower (70%)*</td>
<td>880</td>
<td>943</td>
<td>1,133</td>
<td>1,308</td>
<td>1,459</td>
<td>1,459</td>
<td>1,459</td>
<td>1,459</td>
</tr>
<tr>
<td>Low (80%)*</td>
<td>1,006</td>
<td>1,078</td>
<td>1,294</td>
<td>1,495</td>
<td>1,668</td>
<td>1,668</td>
<td>1,668</td>
<td>1,668</td>
</tr>
<tr>
<td>Median (100%)</td>
<td>1,260</td>
<td>1,350</td>
<td>1,620</td>
<td>1,870</td>
<td>2,086</td>
<td>2,086</td>
<td>2,086</td>
<td>2,086</td>
</tr>
<tr>
<td>Moderate (110%)</td>
<td>1,323</td>
<td>1,417</td>
<td>1,701</td>
<td>1,964</td>
<td>2,191</td>
<td>2,191</td>
<td>2,191</td>
<td>2,191</td>
</tr>
<tr>
<td>Moderate (120%)</td>
<td>1,443</td>
<td>1,546</td>
<td>1,855</td>
<td>2,144</td>
<td>2,391</td>
<td>2,391</td>
<td>2,391</td>
<td>2,391</td>
</tr>
</tbody>
</table>

*70% & 80% rents are only used for units with inclusionary agreements approved prior to April 22, 2003

Rents are calculated at 30% of monthly income, adjusted for household size.

If the tenant pays all or some of the utilities, the maximum rent above must be adjusted.

Using the attached utility allowance table, subtract the appropriate allowance for tenant-paid utilities.

After subtracting the allowance for tenant-paid utilities from the maximum rent, the resultant figure is the actual rent.

II. MAXIMUM HOUSEHOLD INCOME LIMITS (ANNUAL)

<table>
<thead>
<tr>
<th>Income Level</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Low (50%)</td>
<td>25,200</td>
<td>28,800</td>
<td>32,400</td>
<td>35,950</td>
<td>38,850</td>
<td>41,750</td>
<td>44,600</td>
<td>47,500</td>
</tr>
<tr>
<td>Low/Lower (60%)</td>
<td>30,200</td>
<td>34,500</td>
<td>38,800</td>
<td>43,100</td>
<td>46,600</td>
<td>50,000</td>
<td>53,500</td>
<td>56,900</td>
</tr>
<tr>
<td>Low/Lower (70%)*</td>
<td>35,200</td>
<td>40,250</td>
<td>45,300</td>
<td>50,300</td>
<td>54,350</td>
<td>58,350</td>
<td>62,400</td>
<td>66,400</td>
</tr>
<tr>
<td>Low (80%)*</td>
<td>40,250</td>
<td>46,000</td>
<td>51,750</td>
<td>56,500</td>
<td>62,100</td>
<td>66,700</td>
<td>71,300</td>
<td>75,900</td>
</tr>
<tr>
<td>Median (100%)</td>
<td>48,100</td>
<td>54,950</td>
<td>61,850</td>
<td>66,700</td>
<td>74,200</td>
<td>79,700</td>
<td>85,200</td>
<td>90,700</td>
</tr>
<tr>
<td>Moderate (110%)</td>
<td>52,900</td>
<td>60,450</td>
<td>68,050</td>
<td>75,550</td>
<td>81,800</td>
<td>87,650</td>
<td>93,700</td>
<td>99,750</td>
</tr>
<tr>
<td>Moderate (120%)</td>
<td>57,700</td>
<td>65,950</td>
<td>74,200</td>
<td>82,450</td>
<td>89,050</td>
<td>96,850</td>
<td>102,250</td>
<td>108,850</td>
</tr>
<tr>
<td>Workforce 1 (140% of Median)</td>
<td>67,350</td>
<td>76,950</td>
<td>86,600</td>
<td>96,200</td>
<td>103,900</td>
<td>111,600</td>
<td>119,300</td>
<td>127,000</td>
</tr>
<tr>
<td>Workforce 2 (160% of Median)</td>
<td>86,500</td>
<td>98,900</td>
<td>111,350</td>
<td>123,650</td>
<td>133,550</td>
<td>143,450</td>
<td>153,350</td>
<td>163,250</td>
</tr>
</tbody>
</table>

Maximum Income Limits to Qualify Tenants:
50% of Median Income for Very Low Units
80% of Median Income for Low Income Units
120% of Median Income for Moderate Income Units

\(t:\)Housing\Affordability Tables\Affordability Tables 2014
<table>
<thead>
<tr>
<th>Utility or Service</th>
<th>0 BR</th>
<th>1 BR</th>
<th>2 BR</th>
<th>3 BR</th>
<th>4 BR</th>
<th>5 BR</th>
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</thead>
<tbody>
<tr>
<td>Heating</td>
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<tr>
<td>a. Natural Gas</td>
<td>11</td>
<td>14</td>
<td>17</td>
<td>19</td>
<td>22</td>
<td>25</td>
</tr>
<tr>
<td>b. Bottle Gas</td>
<td>34</td>
<td>40</td>
<td>46</td>
<td>53</td>
<td>59</td>
<td>66</td>
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<tr>
<td>c. Electric</td>
<td>13</td>
<td>16</td>
<td>25</td>
<td>31</td>
<td>36</td>
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<td>Cooking</td>
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<tr>
<td>a. Natural Gas</td>
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<td>9</td>
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<tr>
<td>b. Bottle Gas</td>
<td>12</td>
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<td>17</td>
<td>20</td>
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<tr>
<td>c. Electric</td>
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<td>Other Electric</td>
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<td>Water Heating</td>
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<td>c. Electric</td>
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<td>Trash Collection</td>
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<td>Range</td>
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</tbody>
</table>

(Microwave allowance is applicable only if there is not a range)
RECOMMENDATION:
It is recommended that the Housing Advisory Committee (HAC) receive the final Housing Element adopted by the BOS on January 26, 2016 and approved by HCD on May 10, 2016.

DISCUSSION:
The 2015-2023 Housing Element is the fifth cycle of updating the Housing Element of the General Plan for the County of Monterey.

The Housing Element is comprised of several major components:

1. Needs Assessment - To assess the housing needs of current and future residents, especially the housing needs of lower and moderate income households and those with special needs. Special needs groups are defined in State law as the elderly, disabled (including those with developmental disabilities), the homeless, female-headed households, large households (with five or more members), and farmworkers.

2. Constraints Analysis - To assess the market, governmental, environmental, and infrastructure constraints to the provision of a variety of housing options in the community. The County is required under State law to mitigate governmental constraints to the development, preservation, and improvement of housing.

3. Resources Analysis - To assess the availability of financial and administrative resources available for the provision of housing, and most importantly, the land resources (development potential) to accommodate the County's share of the region's housing needs, i.e., Regional Housing Needs Allocation.

4. Review of Accomplishments - To assess the County's achievements during the current Housing Element planning period (fourth cycle) and determine if modifications to policies and programs are warranted.

5. Housing Plan - To develop an eight-year action plan to address the housing needs identified within the context of the constraints and resources available.

In developing the Housing Element, outreach was made to community groups, service providers, and housing professionals to solicit input on needs, constraints, and opportunities. The draft Housing Element was presented to the HAC on July 8, 2015 for input. The final Housing Element is part of the County’s General Plan and will be available on the County’s Resource Management Agency website as well as the Economic Development website.

STAFF RECOMMENDATION:
Staff recommends that the HAC receive the Housing Element.

Prepared By:

David L. Spaur
David L. Spaur, CEcD, EDFP
Economic Development Director
RECOMMENDATION:
It is recommended that the Housing Advisory Committee (HAC) receive the Annual Housing Element Progress Report for 2015 as approved by the Board of Supervisors on April 19, 2016.

DISCUSSION:
State planning law requires jurisdictions to file a Housing Element status report to the State Department of Housing and Community Development and the Governor’s Office of Planning and Research by April 1 of each year to assess the County's achievements during the Housing Element planning period. The purpose of the annual report is to demonstrate the County’s progress towards meeting its adopted housing goals and to position itself to receive related State grant funding. The Board of Supervisors held a public meeting and approved the 2015 Annual Housing Element Progress Report on April 19, 2016.

The report identifies the County’s Regional Housing Needs Assessment (RHNA) allocation, the County’s self-stated housing production goals, and the progress made towards meeting such goals. It also describes the status of other action items outlined in the Housing Element’s implementation program. The County’s RHNA allocation represents the number of housing units that the Association of Monterey Bay Area Governments (AMBAG) has determined will be needed to accommodate the County’s projected population growth for the designated planning period. While jurisdictions are not required to ensure the construction of the RHNA allocation, they are required to identify sufficient sites with the appropriate zoning in place to accommodate the allocation.

STAFF RECOMMENDATION:
Staff recommends that the HAC receive the Annual Housing Element Progress Report for 2015.

Prepared By:

David L. Spaur
David L. Spaur, CEdD, EDFP
Economic Development Director
ANNUAL ELEMENT PROGRESS REPORT
Housing Element Implementation
(CCR Title 25 §8202)

Jurisdiction: MONTEREY COUNTY
Reporting Period: 01/01/2015 - 12/31/2015

Pursuant to GC 65400 local governments must provide by April 1 of each year the annual report for the previous calendar year to the legislative body, the Office of Planning and Research (OPR), and the Department of Housing and Community Development (HCD). By checking the “Final” button and clicking the “Submit” button, you have submitted the housing portion of your annual report to HCD only. Once finalized, the report will no longer be available for editing.

The report must be printed and submitted along with your general plan report directly to OPR at the address listed below:

Governor's Office of Planning and Research
P.O. Box 3044
Sacramento, CA 95812-3044
# ANNUAL ELEMENT PROGRESS REPORT

**Housing Element Implementation**

*CCR Title 25 §6202*

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**Jurisdiction:** MONTEREY COUNTY  
**Reporting Period:** 01/01/2015 - 12/31/2015

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### Table A

Annual Building Activity Report Summary - New Construction  
**Very Low-, Low-, and Mixed-Income Multifamily Projects**

<table>
<thead>
<tr>
<th>Housing Development Information</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>5a</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Camphor Apartments</td>
<td>8+</td>
<td>Resident</td>
<td>37</td>
<td>6</td>
<td>0</td>
<td>1</td>
<td>44</td>
<td>0</td>
<td>---</td>
</tr>
</tbody>
</table>
|                                  |   | Housing with Financial Assistance and/or Deed Restrictions |   |   |   |   |   |   | Multifamily Housing Program - HCD, Community Development Block Grant, Redevelopment Agency or Successor Agency  
Funds, Low Income Housing Tax | 43 |

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| (9) Total of Moderate and Above Moderate from Table A3 | 0 | 152 |
| (10) Total by Income Table A/A3 | 37 | 6 | 0 | 152 |
| (11) Total Extremely Low-Income Units* | 9 |

* Note: These fields are voluntary
ANNUAL ELEMENT PROGRESS REPORT  
Housing Element Implementation  
(CCR Title 25 §6202 )

Jurisdiction  
MONTEREY COUNTY

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01/01/2015 – 12/31/2015

Table A2

Annual Building Activity Report Summary - Units Rehabilitated, Preserved and Acquired pursuant to GC Section 65833.1(c)(1)

Please note: Units may only be credited to the table below when a Jurisdiction has included a program in its housing element to rehabilitate, preserve or acquire units to accommodate a portion of its RHA which meet the specific criteria as outlined in GC Section 65833.1(c)(1).

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Affordability by Household Incomes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>0</strong></td>
</tr>
<tr>
<td>(1) Rehabilitation Activity</td>
<td><strong>0</strong></td>
</tr>
<tr>
<td>(2) Preservation of Units At-Risk</td>
<td><strong>0</strong></td>
</tr>
<tr>
<td>(3) Acquisition of Units</td>
<td><strong>0</strong></td>
</tr>
<tr>
<td>(4) Total Units by Income</td>
<td><strong>0</strong></td>
</tr>
</tbody>
</table>

* Note: This field is voluntary
ANNUAL ELEMENT PROGRESS REPORT
Housing Element Implementation
(CCR Title 25 §5202)

Jurisdiction: MONTEREY COUNTY
Reporting Period: 01/01/2015 - 12/31/2015

Table A3
Annual building Activity Report Summary for Above Moderate-Income Units
(not including those units reported on Table A)

<table>
<thead>
<tr>
<th></th>
<th>1. Single Family</th>
<th>2. 2-4 Units</th>
<th>3. 5+ Units</th>
<th>4. Second Unit</th>
<th>5. Mobile Homes</th>
<th>6. Total</th>
<th>7. Number of Infill units*</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Units Permitted for Moderate</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>No. of Units Permitted for Above Moderate</td>
<td>162</td>
<td>0</td>
<td>0</td>
<td>6</td>
<td>3</td>
<td>161</td>
<td>0</td>
</tr>
</tbody>
</table>

* Note: This field is voluntary
## ANNUAL ELEMENT PROGRESS REPORT

**Housing Element Implementation**

(CCIR Title 25 §6202)

### Jurisdiction

**MONTEREY COUNTY**

### Reporting Period

01/01/2015 – 12/31/2015

### Table B

**Regional Housing Needs Allocation Progress**

Permuted Units Issued by Affordability

<table>
<thead>
<tr>
<th>Income Level</th>
<th>RHNA Allocation by Income Level</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Year 6</th>
<th>Year 7</th>
<th>Year 8</th>
<th>Year 9</th>
<th>Total Units to Date (all years)</th>
<th>Total Remaining RHNA by Income Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Low</td>
<td>Restricted</td>
<td>374</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>37</td>
<td>357</td>
</tr>
<tr>
<td></td>
<td>Non-Restricted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td>Restricted</td>
<td>264</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>248</td>
</tr>
<tr>
<td></td>
<td>Non-Restricted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moderate</td>
<td>Restricted</td>
<td>282</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>282</td>
</tr>
<tr>
<td></td>
<td>Non-Restricted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Above Moderate</td>
<td>Restricted</td>
<td>551</td>
<td>182</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>182</td>
<td>469</td>
</tr>
</tbody>
</table>

**Total RHNA by COG:**

1081

**Total Units:**

205

**Remaining Need for RHNA Period:**

1546

*Note: units serving extremely low-income households are included in the very low-income permitted units total.*
# ANNUAL ELEMENT PROGRESS REPORT
## Housing Element Implementation
(CCR Title 25 §6202)

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>MONTEREY COUNTY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Period</td>
<td>01/01/2015 - 12/31/2015</td>
</tr>
</tbody>
</table>

## Table C

Program Implementation Status

<table>
<thead>
<tr>
<th>Name of Program</th>
<th>Objective</th>
<th>Timeframe In H.E.</th>
<th>Status of Program Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>H-2c Extremely Low Income and Special Needs Individuals and Households</strong></td>
<td>Assist 20 extremely low income individuals and households in new or expanded residential care facilities, emergency shelters, transitional housing, supportive housing, or SRO facilities over eight years.</td>
<td>Ongoing</td>
<td>Since funding a portion of the construction cost for a transitional housing unit at Rancho Cielo located outside of Salinas, the County continues to support by providing CDBG funds to Rancho Cielo for services for at-risk youth dealing in transitional housing. The County actively participates in making funding recommendations to HUD for Continuum of Care and ESG programs/projects. Additionally, the County is an active participant in a newly formed group which includes multiple county departments, other jurisdictions, and private foundations and businesses to address the lack of housing for the homeless. Finally, the County also has a seat on the newly formed Monterey Bay Economic Partnership which has been formed to address the housing crisis in the region.</td>
</tr>
<tr>
<td><strong>H-2d Homebuyer Assistance Programs</strong></td>
<td>Continue to offer a local first-time homebuyer program. Continue to provide information on other available homebuyer assistance programs (such as the CalHFA and GSFA programs) on County website. Promote CalHFA and GSFA.</td>
<td>Ongoing</td>
<td>Interest in the County’s First Time Homebuyer Program remains high with 111 families prequalified to participate as of year end 2016. The County also continues to provide information about other homebuyer assistance programs such as Golden State Finance Authority’s Mortgages Credit Certificate and Down Payment Assistance Grant programs.</td>
</tr>
<tr>
<td>H-2.a Housing Choice Vouchers</td>
<td>Support Housing Authority of Monterey County efforts to provide vouchers to very low income individuals and families annually. (At least 75 percent of the vouchers are required to be for extremely low income households pursuant to HUD regulations.)</td>
<td>Ongoing</td>
<td>The County continues to support the Section 8 Program by referring inquiries to the Housing Authority. This support is applicable to Project Based vouchers as well.</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------</td>
<td>--------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>H-3.a Adequate Sites for RHNA</td>
<td>As part of the development of future Community and Specific Plans for Community Areas and Capital improvement and Financing Plans for Rural Centers, ensure that an adequate inventory of vacant and underutilized residential and mixed use sites is available to accommodate the County's remaining and future RHNA. Monitor the sites inventory annually to assess the County's continued ability to facilitate a range of residential housing types. Provide inventory of vacant and underutilized sites and promote lot consolidation opportunities to interested developers throughout the planning period.</td>
<td>Ongoing</td>
<td>As part of the development of future Community and Specific Plans for Community Areas and Capital Improvement and Financing Plans for Rural Centers, ensure that an adequate inventory of vacant and underutilized residential and mixed use sites is available to accommodate the County's remaining and future RHNA. This to be done within this planning period through 2023.</td>
</tr>
<tr>
<td>H-4.a Zoning Ordinances and Permit Processing</td>
<td>If amendment to Title 21 regarding the removal of the UP requirement for multifamily housing is considered, this will be completed within two years of the Housing Element adoption. This amendment would help to remove governmental constraints on the provision of housing in Monterey County by streamlining permit processing procedures and facilitate the provision of housing for special needs and extremely low income households.</td>
<td>2018</td>
<td>If amendment to the zoning code for multifamily housing development occurs, this would occur 2 years following the HE adoption, resulting in amendments to occur by 2018.</td>
</tr>
<tr>
<td>H-5.a Fair Housing</td>
<td>Include information on County's website and develop written material as needed in the RHA for outreach.</td>
<td>Ongoing</td>
<td>The County currently provides CDBG funding to two fair housing service providers - Legal Services for Seniors and Project Sentinel. The services</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Program</th>
<th>2016</th>
<th>Ongoing</th>
</tr>
</thead>
<tbody>
<tr>
<td>H-6.b Non-Profit Housing Assistance Programs</td>
<td>2016. Continue marketing efforts throughout the planning period. Continue to distribute fair housing information at public counters and community locations. Continue to refer questions and complaints regarding fair housing to the appropriate fair housing service providers and monitoring agencies.</td>
<td>The County supports the efforts of local non-profits that provide direct housing assistance to lower income Monterey County households. The County also provides funding to two non-profits to assist with fair housing efforts. The County will continue to market the availability of these programs through written materials (e.g., brochures, flyers, etc.), on the County's website and at neighborhood and community centers. The County provides technical assistance to non-profit housing developers in regard to funding and specific development issues of new projects. The County also provides direct financial support to projects as funds become available. During 2016, the County continued its assistance to non-profit South County Housing/Eden with financing for the reconstruction of the C砤mpora Farm Labor Camp that formerly housed 44 extremely low, very low, and low income farmworker families totaling 174 people near Salinas. County-provided State CDG funding provided by the Salar Acquisition Notice and complete entitlements package were used to pay for a portion of the facility and system improvements. Additionally, County RDA Housing Successor Agency loan funded a portion of the construction which began in January 2016. Occupancy is expected in the first quarter of 2018. The County also assisted MidPen Housing to acquire and rehab Geist Street, an 11 unit project located in Castroville, by providing both CDG and Housing Successor Agency funds. Work began and was completed in 2018. Four of the 11 units are farmworker residences. Deed restrictions provide affordability at the following levels: 2 units @ extremely low, 4 units @ very low, and 6 units at low income.</td>
</tr>
<tr>
<td>H-6.c Homeless Services</td>
<td>Continue to allocate CDG funds to service providers that provide assistance to the homeless through the annual budgeting process. Provide assistance to 2,000 homeless persons through</td>
<td>The County provides financial assistance on an annual basis through its CDG program to a number of local non-profit agencies that offer direct services to the homeless as well as to those at risk of becoming homeless. Shelter Outreach Plus offers outreach and medical services to the homeless in the unincorporated area of north county known as Pajaro. In 2016, their Mobile</td>
</tr>
<tr>
<td>H-2.2 Farmworkers and Agricultural Employees Housing</td>
<td>Ongoing</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>---------</td>
<td></td>
</tr>
<tr>
<td>Assisted employers with providing 40 lower income farmworker housing units over eight years. Specifically, work to achieve 10 of the 40 units as extremely low income. On an ongoing basis, coordinate with nonprofit developers and employers to identify appropriate sites and funding sources for farmworker housing. Through the NOFA process, continue to provide funding support for farmworker housing using the Affordable Housing Fund. Support applications for term housing grants when the proposed projects are consistent with the County’s General Plan.</td>
<td>During 2015, the County continued its assistance to non-profit South County Housing/Eden with financing for the reconstruction of the Carphorn Farm Labor Camp that formerly housed 44 extremely low, very low, and low-income farmworker families totaling 174 people near Salinas. County-provided State CDBG funding previously was used to pay down a portion of the Better Acquisition Note and complete onsite water storage and distribution system improvements. Additionally, County RDA/Housing Successor Agency loans funded a portion of the construction which began in January 2015. Occupancy is expected in the first quarter of 2016. The County also assisted MidPen Housing to acquire and rehab Gell Street, an 11 unit project located in Castroville, by providing both CDBG and Housing Successor Agency funds. Work began and was completed in 2016. Four of the 11 residents are farmworkers. Deed restrictions provide affordability at the following levels: 2 units @ extremely low, 4 units @ very low, and 6 units at low income. Finally, the County worked with ag employer T&amp;A to fast track a farmworker project in the unincorporated area of Soledad. One hundred two-bedroom units will house up to 800 farmworkers. The project began construction in mid-2015 and is expected to open in April of 2016.</td>
<td></td>
</tr>
<tr>
<td>H-1.2 Preservation of Existing Rental Affordable Units</td>
<td>Ongoing</td>
<td></td>
</tr>
<tr>
<td>Preserve nine at-risk affordable housing units</td>
<td>The County assisted MidPen Housing to acquire and rehab Gell Street, an 11 unit project located in Castroville, by providing both CDBG and Housing Successor Agency funds. The owners had allowed the property to fall into disrepair, defaulted on the State loan and, for all intents and purpose, abandoned the property. MidPen negotiated to purchase the property, take over the state loan and fund the rehab through County funding. Acquisition and the work occurred in 2015. Four of the 11 residents are farmworkers. Deed restrictions provide affordability at the following levels: 2 units @ extremely low, 4 units @ very low, and 8 units at low income.</td>
<td></td>
</tr>
<tr>
<td>H-1.3 Energy Conservation</td>
<td>Ongoing</td>
<td></td>
</tr>
<tr>
<td>Reduce energy consumption and carbon emissions throughout the planning period. Assist in energy conservation improvements for five homes annually.</td>
<td>The County is undertaking a number of energy conservation related initiatives. Since adopting a Green Building Ordinance and the Municipal Climate Action Plan (MCAP) in 2013, the County has continued to work on a Community Climate Action Plan. In 2015, staff developed and implemented a public outreach and participation strategy which included a Community Meeting, online poll, and creation of a Focus Group which met 8 times over 4 months to discuss and develop goals and measures. Staff participated in the Project Development Advisory Committee which has the responsibility for</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
<td>Frequency</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>H-2.5 Inclusionary Housing</td>
<td>Facilitate the development of 10 affordable inclusionary housing units annually.</td>
<td>Annually</td>
</tr>
<tr>
<td>H-3.5 Community and Specific Plans</td>
<td>Pursue the General Development Plan for the Cypress Opportunity Area in Castroville Community Plan within this Housing Element planning period. Continue to work with the developers of East Garrison and Butterfly Village to implement Specific Plans throughout the area.</td>
<td>2016-2023</td>
</tr>
<tr>
<td>Planning period. Continue the development of Community Plans for the Pajaro, Chualar, and Moss Landing Community Areas.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lockwood, Pine Canyon in King City, Pleylo, River Road, San Ardo and San Lucas.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ANNUAL ELEMENT PROGRESS REPORT
Housing Element Implementation
(CCR Title 25 §6202)

Jurisdiction
MONTEREY COUNTY

Reporting Period
01/01/2015 - 12/31/2015

General Comments:
MONTEREY COUNTY HOUSING ADVISORY COMMITTEE

<table>
<thead>
<tr>
<th>MEETING:</th>
<th>September 9, 2016</th>
<th>AGENDA NO.:</th>
<th>5d</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUBJECT:</td>
<td>Receive the 2016-17 Annual Action Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEPARTMENT:</td>
<td>Economic Development Department</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

RECOMMENDATION
It is recommended that the Housing Advisory Committee (HAC) receive the 2016-17 Annual Action Plan.

SUMMARY:
The U.S. Department of Housing and Urban Development (HUD) qualified Monterey County, including the Cities of Gonzales, Greenfield, and Sand City as an Urban County for entitlement purposes. As an Urban County, the County receives Community Development Block Grant (CDBG) funding annually from HUD. To receive its annual CDBG grant allocation, the Urban County must adopt an Annual Action Plan, including a description of eligible projects and programs to be funded.

DISCUSSION:
The Monterey Urban County has been awarded an allocation from HUD of $1,156,760 for the jurisdictions of Gonzales, Greenfield, Sand City and the unincorporated areas of the County of Monterey for FY 2016-17. The CDBG Urban County funding may be used to carry out a wide range of economic and community development activities directed toward promoting economic development, revitalizing neighborhoods, and providing improved community facilities and services which benefit low and moderate (Low/Mod) income persons.

Three types of activities can be undertaken: projects, services, and administration. Project activities are generally infrastructure or construction projects. Service activities are programs benefitting Low/Mod individuals. Administrative activities include direct and indirect costs associated with managing the grant. There are limits placed on the total public service contracts which cannot exceed 15% of the total grant and a portion of the funds must be allocated for fair housing services. Administration cannot exceed 20% of the total grant.

Each year, HUD recipients are required to submit an Action Plan to HUD which includes approved funding recommendations for projects, services, and administration. On May 10, 2016, the Board of Supervisors held a public hearing, received comments, and approved the Annual Action Plan. It was submitted to HUD with final approval expected by June 30, 2016. A copy of the final approved Urban County Annual Action Plan for FY 2016-2017 will be made available on each participating jurisdiction’s website and at the Economic Development Department website.

STAFF RECOMMENDATION:
Staff recommends that the HAC receive the Annual Action Plan.

Prepared By:

David L. Spaur
David L. Spaur, CEdD, EDFP
Economic Development Director
MONTEREY COUNTY HOUSING ADVISORY COMMITTEE

<table>
<thead>
<tr>
<th>MEETING:</th>
<th>September 9, 2016</th>
<th>AGENDA NO.:</th>
<th>5e</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUBJECT:</td>
<td>Receive the CDBG Amended Consolidated Plan as approved by the Board of Supervisors on June 21, 2016.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEPARTMENT:</td>
<td>Economic Development Department</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

RECOMMENDATION:
It is recommended that the Housing Advisory Committee (HAC) receive the CDBG Amended Consolidated Plan as approved by the BOS on June 21, 2016.

DISCUSSION:
The 2013-17 Consolidated Plan identified the housing and community development needs in the Urban County and set forth a strategic plan for addressing the identified needs. Moreover, the Consolidated Plan served as the Urban County’s official application to U.S. Department of Housing and Urban Development (HUD) for Community Development Block Grant (CDBG) program funds. Subsequently, in November 2012, the County of Monterey, along with the cities of Del Rey Oaks and Gonzales, was approved by HUD to participate in the CDBG program as an entitlement jurisdiction and receive annual funding directly from the HUD.

The 2013-17 Consolidated Plan has been amended as part of the requalification process for Urban County status due to changes in the participating jurisdictions. The City of Del Rey Oaks chose not to continue as a partner, and the cities of Greenfield and Sand City joined as new participating jurisdictions. The 2013-17 Consolidated Plan was amended to provide an updated description of the Urban County geography, the associated housing and community development needs, and changes to priorities and strategies (if any).

The final amended 2013-17 Consolidated Plan is located online at the following link: http://www.co.monterey.ca.us/Home/ShowDocument?id=11592

STAFF RECOMMENDATION:
Staff recommends that the HAC receive the CDBG Amended Consolidated Plan.

Prepared By:

David L. Spaur
David L. Spaur, CEdD, EDFP
Economic Development Director