



SAN DIEGO  
HOUSING  
COMMISSION

# Moving Forward Moving To Work Program Amendment to Annual Plan Fiscal Year 2026

San Diego Housing Commission  
Rental Assistance Division  
1122 Broadway, Suite 300  
San Diego, CA 92101  
[www.sdhc.org](http://www.sdhc.org)



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# SECTION I – INTRODUCTION AND AGENCY GOALS

## MESSAGE FROM THE PRESIDENT & CEO

Putting people first and acting with innovation, compassion and expedience are qualities that the San Diego Housing Commission (SDHC) values and puts into practice daily. Our focus remains on the people we serve.

Our status as a Moving to Work (MTW) agency and the flexibility it provides are essential to our ongoing efforts to have a positive impact on our community and help to make San Diego a diverse, vibrant and thriving city for people to call home.

For example, with MTW flexibility, we launched the SDHC Achievement Academy nearly 15 years ago. Its programs provide opportunities for families with low income to become more financially self-reliant. The SDHC Achievement Academy's programs emphasize career planning, job skills, job placement and personal financial education. Collaborations with employers, educational institutions and community organizations expand the offerings available for participants—at no cost to them. More than 1,700 people participated in the SDHC Achievement Academy in Fiscal Year 2025.



Our Path to Success MTW initiative also continues to encourage our rental assistance and public housing participants to achieve greater financial self-reliance. The average annual income of families defined as able to work has increased 107% since Fiscal Year 2013, when we started implementing Path to Success.

MTW initiatives are also among the programs in our HOUSING FIRST – SAN DIEGO homelessness initiative, which has created more than 12,000 housing solutions since November 2014 for San Diegans at risk of or experiencing homelessness. Our Landlord Engagement and Assistance Program (LEAP), Moving Home rapid rehousing, Moving On rental assistance, and Monarch School programs are among the efforts providing housing solutions through HOUSING FIRST – SAN DIEGO.

We know that housing assistance for families struggling economically is most effective when many organizations serving the community work together. We are grateful for the community-based organizations, affordable housing developers, property owners and landlords, service providers, and government agencies that collaborate with us to achieve positive impacts for City of San Diego families.

We also thank our elected leaders, including Mayor Todd Gloria, City Council President Joe LaCava and all San Diego City Councilmembers, for the leadership, direction and support they provide. SDHC Board of Commissioners Chair Eugene “Mitch” Mitchell and our entire Board also provide invaluable insight, guidance and engagement for our efforts.

I am proud of our staff for their continuing excellence and for approaching their work with dedication, empathy, professionalism and a solutions-oriented mindset.

As we look to the year ahead, I am excited to collaborate with our SDHC Board of Commissioners, the San Diego City Council and community partners as we implement our next five-year strategic plan to guide us in our ongoing mission.

Sincerely,

Lisa Jones  
President & CEO  
San Diego Housing Commission



### SHORT-TERM AND LONG-TERM MTW GOALS

#### LONG-TERM GOALS

##### SDHC STRATEGIC PLAN

On October 10, 2025, the SDHC Board of Commissioners approved SDHC’s Strategic Plan for Fiscal Years 2026 – 2030. SDHC’s Strategic Plan includes the vision, mission, purpose, core values and strategic priorities that provide a blueprint for SDHC’s focus, goals and actions during the Strategic Plan period.

**Vision:** Everyone in the City of San Diego has a home they can afford.

**Mission:** The San Diego Housing Commission (SDHC) fosters social and economic stability by ensuring the development and preservation of quality, affordable housing solutions for San Diegans.

**Purpose:** Provide stable, quality housing solutions so the community can thrive.

**Core Values:** At SDHC, we:

- Treat our clients, staff, community and partners fairly and with dignity and respect.
- Commit to excellence and innovation in all we do.
- Ensure that our programs are informed by the input of those we serve.
- Commit to transparency and being strong financial stewards.
- Collaborate with partners for the best outcomes for San Diegans.

**Strategic Priority Areas:**

1. Reimagine the Agency
2. Reassess Annually
3. Create and Preserve Housing
4. Embody Person-Centered Operations
5. Address and Prevent Homelessness

##### COMMUNITY ACTION PLAN ON HOMELESSNESS FOR THE CITY OF SAN DIEGO

Four years after the San Diego City Council accepted the Community Action Plan on Homelessness for the City of San Diego (Community Action Plan), an updated analysis of the crisis response and housing needs to address homelessness in the City was completed during Fiscal Year 2024.

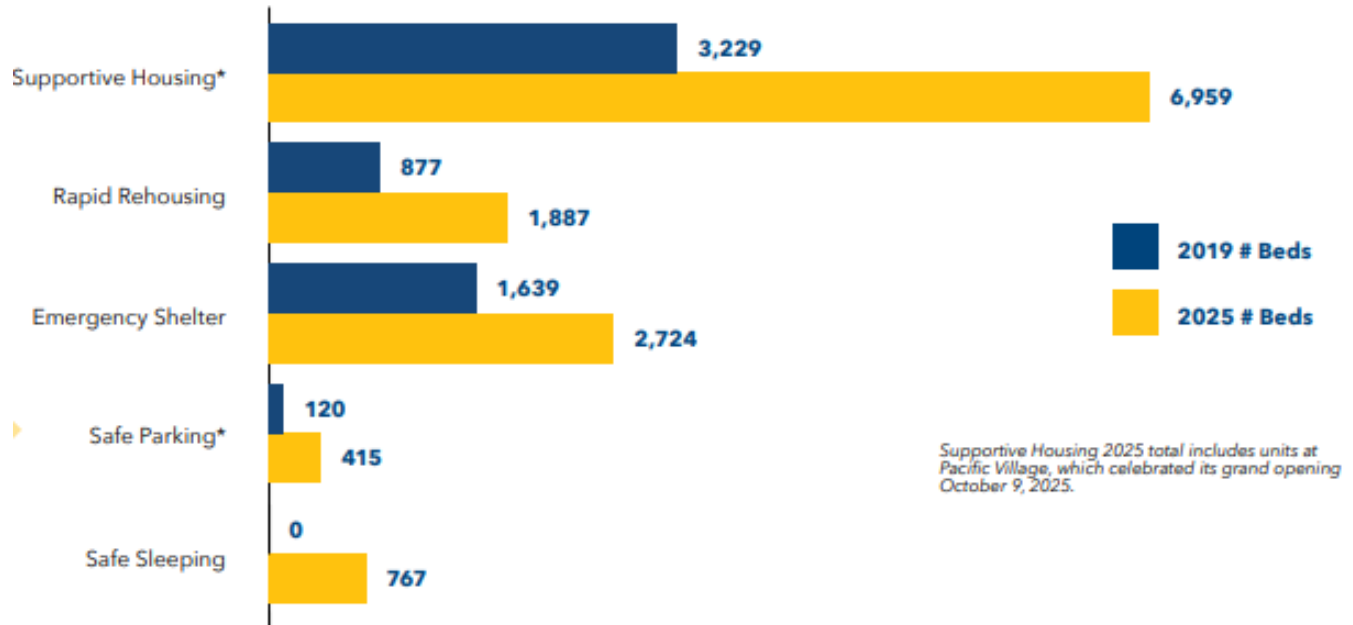
The update, presented to the San Diego City Council on November 14, 2023, highlighted progress achieved from 2019 to 2023 and identified revised shelter and housing needs for the years to come. Progress continued during Fiscal Year 2025, with another update provided to the City Council on May 20, 2025. SDHC, the City’s Homelessness Strategies and Solutions Department, and the San Diego Regional Task Force on Homelessness (RTFH) jointly presented the 2025 update.

The Community Action Plan is a comprehensive, 10-year plan that builds on progress, lays out short-term achievable goals, and serves as a guide for long-term success in addressing homelessness. SDHC was one of the lead agencies in the creation of the Community Action Plan, which the San Diego City Council accepted on October 14, 2019.



### Progress to Date

2019 vs. 2025



### Progress Since 2023

Needs 2023 - 2029 | By Intervention

|                            | Needs 2023 - 2029        | Resourced added 2023 - 2025           | Remaining Needs          |
|----------------------------|--------------------------|---------------------------------------|--------------------------|
| Crisis Response Beds       | 465 - 930 beds           | +185 beds                             | 280 - 745 beds           |
| Safe Sleeping/Safe Parking | Not Identified           | +813 resources                        | N/A                      |
| Rapid Rehousing            | 3,080 units              | +291 beds/units                       | 2,789 beds/units         |
| Supportive Housing         | 3,520 units              | +574 beds/units                       | 2,946 beds/units         |
| Diversion                  | 2,700 resources annually | +893 resources (489 one-time funding) | 2,296 resources annually |
| Prevention                 | 2,025 resources annually | +878 resources                        | 1,147 resources annually |
| <b>Total Estimate</b>      | <b>11,810*</b>           | <b>3,634*</b>                         | <b>9,691*</b>            |

\*Total uses midpoint of crisis response range.





## SHORT-TERM GOALS

### HOMEKEY-FUNDED HOTEL CONVERSIONS INTO AFFORDABLE HOUSING

More than 220 new affordable rental housing units with supportive services for people experiencing homelessness have been completed in 2025 at properties SDHC acquired with California Homekey Program funds, in collaboration with the City of San Diego and the County of San Diego.

On October 9, 2025, SDHC commemorated the grand opening of Pacific Village, which provides 62 affordable housing units with supportive services for people experiencing homelessness, of which 15 housing units are for veterans.

On June 12, 2025, SDHC also commemorated the grand opening of Presidio Palms, which provides 161 affordable housing units with supportive services for people experiencing homelessness, including transition-age youth.

Both Presidio Palms and Pacific Village are among the properties for which the state has awarded Homekey funds to create new housing. Overall, since Homekey launched in 2020, the state has awarded more than \$105 million to SDHC collaborations with the City and County to create more than 600 affordable housing units with supportive services for people experiencing homelessness. Through its purchases with these funds, SDHC owns more than 550 of the more than 600 Homekey-funded units. SDHC also has awarded more than 600 rental housing vouchers to assist residents with their rent at all of these Homekey-funded properties.

| Property                                                               | Address                 | SDHC Purchase or Collaboration                                                         | Homekey Funds Awarded | SDHC Rental Housing Vouchers Committed | Access to Supportive Services |
|------------------------------------------------------------------------|-------------------------|----------------------------------------------------------------------------------------|-----------------------|----------------------------------------|-------------------------------|
| Presidio Palms                                                         | 2087 Hotel Circle South | SDHC Purchase                                                                          | \$35,000,000          | 161                                    | Yes                           |
| Pacific Village                                                        | 3737-3747 Midway Drive  | SDHC Purchase                                                                          | \$16,850,000          | 62                                     | Yes                           |
| The Shores at North Beach (formerly known as Abbott Street Apartments) | 2147 Abbott Street      | Collaboration (Wakeland Housing)                                                       | \$3,900,000           | 13                                     | Yes                           |
| PATH Villas El Cerrito                                                 | 5476 El Cajon Boulevard | Collaboration (PATH Ventures, Bold Communities and Family Health Centers of San Diego) | \$11,825,000          | 40                                     | Yes                           |
| Kearny Vista                                                           | 5400 Kearny Mesa Road   | SDHC Purchase                                                                          | \$10,000,000          | 142                                    | Yes                           |
| Valley Vista                                                           | 1865 Hotel Circle South | SDHC Purchase                                                                          | \$27,700,000          | 190                                    | Yes                           |
| <b>TOTAL</b>                                                           |                         |                                                                                        | <b>\$105,275,000</b>  | <b>608</b>                             |                               |



*Pacific Village Grand Opening  
October 9, 2025*



### SDHC COLLABORATIVE AFFORDABLE HOUSING DEVELOPMENTS

Furthering the goal of increasing and preserving affordable housing, the following SDHC collaborative developments are among 2,668 affordable rental housing units that have received at least preliminary approval of financing from the SDHC Board of Commissioners and are pending completion:

- **8th Avenue Family Housing** (new construction) – 79 affordable units for families with low income
- **Avanzando Sany Ysidro** (new construction) – 101 affordable units for families with low income
- **Bandar Salam** (rehabilitation) – 67 affordable units for families with low income
- **Cortez Hill Apartments** (new construction) – 87 affordable units for families with low income, of which 14 units are for families experiencing homelessness
- **Cuatro at City Heights** (new construction) – 115 affordable units for families with low income, including 30 veterans experiencing homelessness
- **Green Manor Apartments** (rehabilitation) – 149 affordable for seniors ages 62 and older with low income
- **Harrington Heights** (new construction) – 270 affordable units for individuals and veterans experiencing homelessness and individuals with very low income (formerly 13th & Broadway)
- **Hillcrest Hall** (new construction) – 97 affordable housing units for families with income
- **Iris Trolley Apartments** (new construction) – 63 affordable units for families with low income
- **Kindred** (new construction) – 125 affordable units for families with low income, including 59 affordable rental units for with supportive service for seniors aged 55 and older experiencing homelessness
- **Market Street Apartments** (new construction) – 137 affordable housing units for with low income
- **Mercado Apartments** (rehabilitation) – 142 affordable units for families with low income
- **Modica Family Apartments** (new construction) – 93 affordable units for individuals and families with low income
- **Navajo Family Apartments** (new construction) – 44 affordable units for families with low income
- **Palm City Transit Village** (new construction) – 78 affordable units for families with low income
- **Rancho Bernardo Transit Village** (new construction) – 99 affordable units for families with low income
- **Rose Creek Village** (new construction) – 59 affordable units for families with low income, including 18 units for veterans with extremely low-income experiencing homelessness
- **Sea Breeze Gardens** (new construction) – 266 affordable units for families with low income
- **Serenade on 43<sup>rd</sup>** (rehabilitation) – 64 affordable units for families with low income, including 31 units set aside for individuals experiencing homelessness with a serious mental disability
- **Serra Mesa** (new construction) – 59 affordable units for families with low income, including veterans experiencing homelessness
- **Studio 15 Apartments** (rehabilitation) – 272 affordable units for families with low income
- **Swift Avenue Apartments** (new construction) – 56 affordable units for families with low income, including veterans experiencing homelessness
- **The Grant at Mission Trails** (new construction) – 47 affordable units for families with low income, including veterans experiencing homelessness
- **The Iris** (new construction, mixed income) – 99 affordable units for families with low income



## SECTION II – GENERAL OPERATING INFORMATION

### A. HOUSING STOCK INFORMATION MATRIX

#### I. PLANNED NEW PUBLIC HOUSING UNITS

New public housing units that the MTW PHA anticipates will be added during the Plan Year.

| ASSET<br>MANAGEMENT<br>PROJECT (AMP)<br>NAME AND<br>NUMBER | BEDROOM SIZE |   |   |   |   |    | TOTAL<br>UNITS | POPULATION<br>TYPE* | SECTION 504<br>ACCESSIBLE UNITS*<br>MOBILITY | SECTION 504-<br>UNITS* (HEARING/<br>VISION) |
|------------------------------------------------------------|--------------|---|---|---|---|----|----------------|---------------------|----------------------------------------------|---------------------------------------------|
|                                                            | 0            | 1 | 2 | 3 | 4 | 5+ |                |                     |                                              |                                             |
| N/A                                                        | 0            | 0 | 0 | 0 | 0 | 0  | 0              | N/A                 | 0                                            | 0                                           |

TOTAL PUBLIC HOUSING UNITS TO BE ADDED **0**

\*The federal accessibility standard under HUD's Section 504 regulation is the Uniform Federal Accessibility Standards (UFAS) for purposes of Section 504 compliance (24 CFR 8.32). HUD recipients may alternatively use the 2010 ADA Standards for Accessible Design under Title II of the ADA, except for certain specific identified provisions, as detailed in HUD's Notice on "Instructions for use of alternative accessibility standard," published in the Federal Register on May 23, 2014 ("Deeming Notice") for purposes of Section 504 compliance, <https://www.govinfo.gov/content/pkg/FR-2014-05-23/pdf/2014-11844.pdf>

\* Select "Population Type" from: Elderly, Disabled, General, Elderly/Disabled, Other

If "Population Type" is "Other" please describe:

N/A

#### II. PLANNED PUBLIC HOUSING UNITS TO BE REMOVED

Public housing units that the MTW PHA anticipates will be removed during the Plan Year.

| AMP NAME AND NUMBER | NUMBER OF UNITS TO BE<br>REMOVED | EXPLANATION FOR REMOVAL |
|---------------------|----------------------------------|-------------------------|
| N/A                 | 0                                | N/A                     |

0

TOTAL PUBLIC HOUSING UNITS TO BE REMOVED IN THE PLAN YEAR



## A. HOUSING STOCK INFORMATION MATRIX

### III. PLANNED NEW PROJECT-BASED VOUCHERS

Tenant-based vouchers that the MTW PHA anticipates project-basing for the first time during the Plan Year. These include only those in which at least an AHAP will be in place by the end of the Plan Year.

| PROPERTY NAME            | NUMBER OF VOUCHERS TO BE PROJECT-BASED | RAD | DESCRIPTION OF PROJECT          |
|--------------------------|----------------------------------------|-----|---------------------------------|
| Beyer Boulevard          | 30                                     | N/A | Low-Income (Extended from FY25) |
| Navajo Family Apartments | 8                                      | N/A | Low-Income (Extended from FY25) |
| 73rd Street Apartments   | 30                                     | N/A | Homeless (Extended from FY25)   |
| Encanto Gateway          | 10                                     | N/A | Low-Income (Extended from FY25) |

**78**

**PLANNED TOTAL VOUCHERS TO BE NEWLY PROJECT-BASED**

### IV. PLANNED EXISTING PROJECT-BASED VOUCHERS

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP is already in place at the beginning of the Plan Year.

| PROPERTY NAME        | NUMBER OF PROJECT-BASED VOUCHERS | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT |
|----------------------|----------------------------------|-------------------------------------|------|------------------------|
| Take Wing            | 8                                | Leased/Issued                       | N/A  | Homeless               |
| Hollywood Palms      | 23                               | Leased/Issued                       | N/A  | Low-Income             |
| Leah Residence       | 14                               | Leased/Issued                       | N/A  | Homeless               |
| Townspeople          | 9                                | Leased/Issued                       | N/A  | Homeless               |
| Potiker              | 36                               | Leased/Issued                       | N/A  | Low-Income             |
| Alabama Manor        | 14                               | Leased/Issued                       | N/A  | Low-Income             |
| Meade                | 10                               | Leased/Issued                       | N/A  | Low-Income             |
| Santa Margarita      | 12                               | Leased/Issued                       | N/A  | Low-Income             |
| Courtyard            | 3                                | Leased/Issued                       | N/A  | Low-Income             |
| Hotel Sandford       | 27                               | Leased/Issued                       | N/A  | Low-Income             |
| Connections Housing  | 73                               | Leased/Issued                       | N/A  | Homeless               |
| Mason Hotel          | 16                               | Leased/Issued                       | N/A  | Homeless               |
| Parker-Kier          | 22                               | Leased/Issued                       | N/A  | Homeless               |
| Celadon              | 88                               | Leased/Issued                       | N/A  | Homeless               |
| Alpha Square         | 76                               | Leased/Issued                       | N/A  | Homeless               |
| New Palace Hotel     | 79                               | Leased/Issued                       | N/A  | Homeless               |
| Village North Senior | 44                               | Leased/Issued                       | N/A  | Homeless               |
| Atmosphere           | 51                               | Leased/Issued                       | N/A  | Homeless               |
| Talmadge Gateway     | 59                               | Leased/Issued                       | N/A  | Homeless               |
| Cypress Apartments   | 62                               | Leased/Issued                       | N/A  | Homeless               |
| North Park Senior    | 8                                | Leased/Issued                       | N/A  | Homeless               |
| Quality Inn          | 91                               | Leased/Issued                       | N/A  | Homeless               |
| West Park            | 46                               | Leased/Issued                       | N/A  | Homeless               |
| Alpha Lofts          | 52                               | Leased/Issued                       | N/A  | Homeless               |
| Zephyr               | 84                               | Leased/Issued                       | N/A  | Homeless               |
| Vista Del Puente     | 38                               | Leased/Issued                       | N/A  | Homeless               |
| The Beacon           | 43                               | Leased/Issued                       | N/A  | Homeless               |
| Stella               | 62                               | Leased/Issued                       | N/A  | Homeless               |
| The Link             | 72                               | Leased/Issued                       | N/A  | Homeless               |
| San Ysidro Senior    | 50                               | Leased/Issued                       | N/A  | Homeless               |
| Benson Place         | 82                               | Leased/Issued                       | N/A  | Homeless               |
| Ivy Apartments       | 52                               | Leased/Issued                       | N/A  | Homeless               |
| Ventana al Sur       | 25                               | Leased/Issued                       | N/A  | Homeless               |
| Trinity Place        | 73                               | Leased/Issued                       | N/A  | Homeless               |



## SECTION II – GENERAL OPERATING INFORMATION

|                                                       |     |               |     |                               |
|-------------------------------------------------------|-----|---------------|-----|-------------------------------|
| 14th & Commercial                                     | 254 | Leased/Issued | N/A | Homeless                      |
| The Helm (Front & Beech)                              | 32  | Leased/Issued | N/A | Low-Income                    |
| The Orchard at Hilltop                                | 25  | Leased/Issued | N/A | Low-Income                    |
| Milejo Village (Jamboree)                             | 64  | Leased/Issued | N/A | Homeless                      |
| Tranquility at the Post 310                           | 10  | Leased/Issued | N/A | Homeless                      |
| Valley Vista (Residence Inn Hotel Circle)             | 190 | Leased/Issued | N/A | Homeless                      |
| Kearny Vista (Residence Inn Kearny Mesa)              | 142 | Leased/Issued | N/A | Homeless                      |
| Hillcrest Inn                                         | 12  | Leased/Issued | N/A | Homeless                      |
| Hacienda Townhomes                                    | 19  | Leased/Issued | N/A | Low-Income                    |
| Shoreline                                             | 25  | Leased/Issued | N/A | Low-Income                    |
| Tizon                                                 | 44  | Leased/Issued | N/A | Low-Income                    |
| Nestor Senior Village                                 | 73  | Leased/Issued | N/A | Homeless                      |
| Levant Senior Cottages                                | 70  | Leased/Issued | N/A | Low-Income                    |
| Southwest Village                                     | 50  | Leased/Issued | N/A | Low-Income                    |
| Puesta Del Sol (Ulric Street II)                      | 59  | Leased/Issued | N/A | Homeless & Low-income         |
| Sorrento Towers                                       | 17  | Leased/Issued | N/A | Low-Income                    |
| ADU Pilot                                             | 5   | Leased/Issued | N/A | Low-Income                    |
| Shores at North Beach (prev Abbott Street Apartments) | 13  | Leased/Issued | N/A | Homeless                      |
| Messina Senior Apartments (prev Mt Etna)              | 8   | Leased/Issued | N/A | Low-Income                    |
| Taormina Family Apartments                            | 8   | Leased/Issued | N/A | Low-Income                    |
| Serenade on 43rd                                      | 32  | Committed     | N/A | Low-Income                    |
| SkyLINE                                               | 30  | Committed     | N/A | Low-Income                    |
| Pacific Village                                       | 47  | Leased/Issued | N/A | Homeless; Homeless TAY        |
| Iris at San Ysidro                                    | 25  | Committed     | N/A | Low-Income                    |
| Terrasini Senior Apartments                           | 8   | Committed     | N/A | Low-Income                    |
| Harrington Heights (prev 13th and Broadway 4%)        | 25  | Committed     | N/A | Homeless                      |
| Harrington Heights (prev 13th and Broadway 4%)        | 40  | Committed     | N/A | Low-Income                    |
| Harrington Heights (prev 13th and Broadway 9%)        | 40  | Committed     | N/A | Homeless                      |
| Cuatro at City Heights                                | 48  | Committed     | N/A | Low-Income                    |
| Presidio Palms                                        | 161 | Leased/Issued | N/A | Homeless; Homeless TAY        |
| Kindred                                               | 84  | Committed     | N/A | Homeless Seniors & Low-Income |
| Cortez Hill Apartments                                | 87  | Committed     | N/A | Homeless & Low-income         |
| Price Humble Heart                                    | 33  | Committed     | N/A | Low-Income                    |
| Rose Creek                                            | 9   | Committed     | N/A | Low-Income                    |

**3,293**

**PLANNED TOTAL EXISTING PROJECT-BASED VOUCHERS**

*\* Select "Planned Status at the End of Plan Year" from: Committed, Leased/Issued*



## A. HOUSING STOCK INFORMATION MATRIX

### V. PLANNED OTHER CHANGES TO MTW HOUSING STOCK ANTICIPATED IN THE PLAN YEAR

Examples of the types of other changes can include (but are not limited to): Units held off-line due to relocation or substantial rehabilitation, local non-traditional units to be acquired/developed, etcetera.

No changes anticipated.

### VI. GENERAL DESCRIPTION OF ALL PLANNED CAPITAL EXPENDITURES DURING THE PLAN YEAR

Narrative general description of all planned capital expenditures of MTW funds during the Plan Year.

SDHC anticipates Capital Fund Program formula funds will be used to fund the soft costs, hard costs, and administrative costs of various renovation activities throughout the (8) Public Housing properties consisting of (189) public housing units. Hard costs may include limited site improvements, security and safety improvements, energy efficiency measures, and other critical needs projects as identified via an ongoing physical needs assessment (PNA) of the SDHC portfolio. Soft costs may include architecture and engineering and third-party consultants for due diligence related activities. The properties and scope selection are to be determined.

Pending availability of funds, SDHC also anticipates MTW funds may be used to fund capital expenditure costs of various renovation activities in Project Based Voucher and Local, Non-Traditional units. Capital improvements may include energy efficiency measures, upgrades to plumbing, and other critical needs projects as identified by the PNA effort.





## B. LEASING INFORMATION MATRIX

### I. PLANNED NUMBER OF HOUSEHOLDS SERVED

Snapshot and unit month information on the number of households the MTW PHA plans to serve at the end of the Plan Year.

| PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH: | PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED** |
|----------------------------------------------|------------------------------------------------|---------------------------------------------|
| Public Housing Units Leased                  | 2,155                                          | 180                                         |
| Housing Choice Vouchers Utilized***          | 187,728                                        | 15,644                                      |
| Local, Non-Traditional: Tenant-Based^        | 13,692                                         | 1,141                                       |
| Local, Non-Traditional: Property-Based^      | 13,238                                         | 1,103                                       |
| Local, Non-Traditional: Homeownership^       | 0                                              | 0                                           |
| <b>PLANNED TOTAL HOUSEHOLDS SERVED</b>       | <b>216,813</b>                                 | <b>18,068</b>                               |

\* "Planned Number of Unit Months Occupied/Leased" is the total number of months the MTW PHA plans to have leased/occupied in each category throughout the full Plan Year.

\*\* "Planned Number of Households to be Served" is calculated by dividing the "Planned Number of Unit Months Occupied/Leased" by the number of months in the Plan Year.

\*\*\* "Housing Choice Vouchers (HCV) Utilized" includes all SPVs within the MTW PHA's portfolio.

^ In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households to be served, the MTW PHA should estimate the number of households to be served.

| LOCAL, NON-TRADITIONAL CATEGORY | MTW ACTIVITY NAME/NUMBER                                             | PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED* |
|---------------------------------|----------------------------------------------------------------------|------------------------------------------------|--------------------------------------------|
| Tenant-Based                    | Sponsor-Based Subsidy Program / 2011-8                               | 10,800                                         | 900                                        |
| Tenant-Based                    | Transitional Project-Based Subsidy Program / 2013-6                  | 564                                            | 47                                         |
| Tenant-Based                    | Monarch Housing Program / 2016-1                                     | 300                                            | 25                                         |
| Tenant-Based                    | Guardian Scholars Program / 2016-2                                   | 900                                            | 75                                         |
| Tenant-Based                    | Homeless Shelter Beds / 2016-3                                       | 300                                            | 25                                         |
| Tenant-Based                    | Moving On Program / 2017-1                                           | 480                                            | 40                                         |
| Tenant-Based                    | Moving Home Program / 2018-1                                         | 348                                            | 29                                         |
| Property-Based                  | Affordable Housing Development / 2011-4                              | 13,238                                         | 1,103                                      |
| Property-Based                  | Preservation of Affordable Housing in the City of San Diego / 2021-2 | 0                                              | 0                                          |
| Homeownership                   | Homeownership Program / 2022-1                                       | 0                                              | 0                                          |
| <b>PLANNED/ACTUAL TOTALS</b>    |                                                                      | <b>26,930</b>                                  | <b>2,244</b>                               |

\* The sum of the figures provided should match the totals provided for each local, non-traditional categories in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

### II. DISCUSSION OF ANY ANTICIPATED ISSUES / POSSIBLE SOLUTIONS RELATED TO LEASING

Discussion of any anticipated issues and solutions utilized in the MTW housing program listed.

| HOUSING PROGRAM            | DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS |
|----------------------------|------------------------------------------------------------------|
| MTW Public Housing         | N/A                                                              |
| MTW Housing Choice Voucher | N/A                                                              |
| Local, Non-Traditional     | N/A                                                              |



### C. WAITING LIST INFORMATION MATRIX

#### I. WAITING LIST INFORMATION ANTICIPATED

Snapshot information of waiting list data as anticipated at the beginning of the Plan Year. The "Description" column should detail the structure of the waiting list and the population(s) served.

| WAITING LIST NAME                     | DESCRIPTION    | NUMBER OF HOUSEHOLDS ON WAITING LIST | WAITING LIST OPEN, PARTIALLY OPEN, OR CLOSED | PLANS TO OPEN THE WAITING LIST DURING THE PLAN YEAR |
|---------------------------------------|----------------|--------------------------------------|----------------------------------------------|-----------------------------------------------------|
| Housing Choice Voucher: Tenant-Based  | Community Wide | 68,106                               | Open                                         | Yes                                                 |
| Housing Choice Voucher: Project-Based | Community Wide | 45,013                               | Open                                         | Yes                                                 |
| Housing Choice Voucher: Project-Based | Site-Based     | 12                                   | Closed                                       | No                                                  |
| Public Housing                        | Community Wide | 58,241                               | Open                                         | Yes                                                 |
| Local Non-Traditional                 | Community Wide | N/A                                  | N/A                                          | N/A                                                 |

**Please describe any duplication of applicants across waiting lists:**

Applicants have the opportunity to apply to multiple rental assistance programs and often appear on multiple wait lists.

#### II. PLANNED CHANGES TO WAITING LIST IN THE PLAN YEAR

Please describe any anticipated changes to the organizational structure or policies of the waiting lists(s), including any opening or closing of a waiting list, during the Plan Year.

| WAITING LIST NAME                              | DESCRIPTION OF PLANNED CHANGES TO WAITING LIST |
|------------------------------------------------|------------------------------------------------|
| Housing Choice Voucher: Tenant-Based           | None                                           |
| Housing Choice Voucher: Project-Based          | None                                           |
| Housing Choice Voucher: Project-Based (Single) | None                                           |
| Public Housing                                 | None                                           |
| Local Non-Traditional                          | None                                           |





## SECTION III – PROPOSED MTW ACTIVITIES: HUD APPROVAL REQUESTED

### 2012-1. PATH TO SUCCESS (RE-PROPOSED)

#### Activity Description

Path to Success is SDHC's comprehensive rent-reform activity, designed to utilize federal funding more efficiently and encourage self-sufficiency for Work-Able rental assistance participants while having minimal impact to Elderly/Disabled households. The activity utilizes a tiered income table and progressive minimum family contributions for Work-Able households. The tiered income table incentivizes Work-Able households to increase their income by using the lower edge of an annual income range when calculating the total tenant portion (TTP), known as the family contribution, instead of actual income. Minimum family contributions require Work-Able households to increase their annual income to meet the applicable minimum family contribution thresholds. The activity eliminated all other deductions and allowances except for the childcare and medical expense deductions. The childcare deductions are administered under current regulations while the medical expense deductions are streamlined into standard bands. Disability assistance expenses are also folded into the standardized medical expense bands. The activity also includes a local portability policy.

SDHC implemented Path to Success in Fiscal Year 2013 and has raised minimum family contribution on two separate occasions, each time aligning with the local minimum wage. This demonstrates our commitment to making regular and necessary adjustments to utilize federal funding more efficiently and encourage self-sufficiency for Work-Able rental assistance participants. SDHC plans to update the Path to Success initiative and, with HUD's approval, implement these changes according to the anticipated implementation schedule below. These changes are part of our ongoing efforts to ensure the initiative remains effective and responsive to current economic conditions, while continuing to encourage self-sufficiency efforts among work-able households.

Since 2020, SDHC's average Housing Assistance Payment (HAP) has increased by 80%, and federal HAP funding has not kept up with this pace. Due to increasing HAP costs, and insufficient federal funding to cover existing HAP expenses for currently assisted voucher families, SDHC is re-proposing this activity to continue to serve as many existing rental assistance families as possible while reducing financial risks, including the need to terminate voucher assistance to current families. If this activity, as re-proposed, is not approved, approximately 1,700 families currently receiving rental assistance from SDHC will lose that assistance. This cost-containment measure aims to utilize our federal funding more efficiently while maintaining SDHC's commitment to serving our existing clients.

#### Work-Able Rent Reform Model

**Population Types:** Path to Success designates households as either Work-Able or Elderly/Disabled. Work-Able is defined as a household containing at least one adult who is under 62 years of age, not disabled, and not a verified full-time student aged 18 to 23. Households with one Work-Able adult are designated as Work-Able 1 (WA1), all other households with more than one Work-Able adult are designated as Work-Able 2 (WA2).

SDHC proposes adding a Work-Able 3 (WA3) population. Work-Able households will be assigned a category using the following methodology:

- WA1: Households with one workable adult
- WA2: Households with 2 workable adults
- WA3: Households with 3 or more workable adults

**Family Contribution Calculation:** Path to Success currently utilizes a tiered income table that applies the lower edge of a tier for the household's annual income when calculating the total tenant portion (TTP), referred to as the family contribution. SDHC proposes eliminating the tiered income table and calculating the household's family contribution as either 40% of their adjusted annual income or the applicable minimum family contribution, whichever is greater. The household will remain responsible for the amount of contract rent that exceeds the payment standard.

**Minimum Family Contribution:** Path to Success utilizes minimum family contribution amounts for Work-Able households to encourage self-sufficiency. The minimum family contribution is based on the number of Work-Able adults in the



household and is determined by using factors such as the current local minimum wage rate and a minimum number of hours a Work-Able adult could reasonably be expected to work.

This activity re-proposal utilizes SDHC's MTW flexibility to periodically adjust the Path to Success minimum family contribution to reflect increases in the local minimum wage. The last time Path to Success minimum family contribution amounts were adjusted was in Fiscal Year 2020, when the local minimum wage was \$13.00/hour. The local minimum wage has risen to \$17.25/hour, an increase of 33%, and will increase to \$17.75 in January 2026. This amendment would also permit SDHC to periodically update and implement the minimum family contribution amounts to align with local minimum wage adjustments.

Minimum family contribution would be determined, based on the assumption that each Work-Able adult works 25 hours per week at the current minimum wage, and calculated at 30% of that anticipated income. For example, if one Work-Able adult works 25 hours a week earning the local minimum wage effective in January 2026 of \$17.75/hour, their annual income would be \$23,075. Thirty percent of their monthly income is \$576.88. The minimum family contribution would apply to all Work-Able population types, which includes the proposed Work-Able 3 population. To align with the local minimum wage effective January 2026 of \$17.75, minimum family contribution amounts would be adjusted as follows:

- \$580 for Work-Able 1 households: At \$17.75/hour, a Work-Able 1 household who works 25 hours a week would have an annual income of \$23,075. Thirty percent of their monthly income is \$576.88.
- \$1,155 for Work-Able 2 households: At \$17.75/hour, two adults who each work 25 hours a week would have an annual income of \$46,150. Thirty percent of their monthly income is \$1,153.75.
- \$1,735 for Work-Able 3 households: At \$17.75/hour, three adults who each work 25 hours a week would have an annual income of \$69,225. Thirty percent of their monthly income is \$1,730.63.

### **Elderly/Disabled Rent Reform Model**

Elderly/Disabled households are households where 100 percent of adults are 62 or older, disabled, or a full-time student aged 18 to 23. For Elderly/Disabled households, the current family contribution is calculated at 28.5% of their adjusted annual income. SDHC proposes adjusting the family contribution calculation to 32% of the adjusted income. The minimum family contribution will remain \$0.

### **Statutory Objectives**

The activity will achieve the statutory objectives of utilizing Federal expenditures more efficiently and increasing self-sufficiency.

### **Anticipated Implementation Schedule**

SDHC's plan is to implement the Path to Success updates once the activity is approved by the U.S. Department of Housing and Urban Development (HUD). Exact timing will be determined by a number of factors, including a reasonable noticing period. Noticing to families will begin as soon as HUD approves the proposed MTW Plan Amendment. Notices will be provided to households periodically before implementation, including a final notice prior to implementation. The noticing will include information on the policy updates, why the updates are being implemented, and how the updates may impact households. Households will receive their updated family contribution letters in advance of implementation. All notices will include referrals to SDHC's Achievement Academy or other SDHC partnerships with nonprofit and community-based organizations for services, including work readiness, job placement, job skills, and personal financial education, such as budgeting and credit, to help households increase their income in preparation for the updates.

### **Special Purpose Vouchers**

The Path to Success MTW activity applies to the following Special Purpose Vouchers: Family Unification Program (FUP), Foster Youth to Independence (FYI), Non-Elderly Disabled (NED), and Mainstream.

### **Cost Implications**

SDHC anticipates immediate and ongoing cost reductions once the updates in this activity are implemented. Long-term cost savings cannot be definitively predicted due to fluctuations in household income, changes in payment standard amounts, hardship requests, inflation, and HUD funding levels. However, the immediate cost savings generated from

## SECTION III – PROPOSED MTW ACTIVITIES: HUD APPROVAL REQUESTED



higher minimum family contribution amounts and higher percentage calculation for family contribution will help address current funding uncertainties and insufficiencies. This will enable SDHC to continue providing rental assistance to the households it currently serves, and limit the risk of voucher termination for existing families.

### Need/Justification for MTW Flexibility

**Authorizations of MTW Flexibility:** MTW Agreement Attachment C, Section B (3) containing waivers of Section 3 (b)(3) and (G) of the 1937 Act and 24 C.F.R. 5.403; Section C(11) containing waivers of Section 3(a)(2), 3(a)(3)(A) and Section 6(l) of the 1937 Act and 24 C.F.R. 5.603, 5.611, 5.628, 5.630, 5.632, 5.634 and 960.255 and 966 Subpart A; Section D(1) containing waivers of Section 8(o)(7) of the 1937 Act and 24 C.F.R. 982.162; Section D(2)(a) containing waivers of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518; Section D(2)(c) containing waivers of Section 8(o)(10) of the 1937 Act and 24 C.F.R. 982.507.

**Need for MTW Flexibility:** MTW authorizations needed to determine family contribution that differs from the currently mandated program requirements and its implementing regulations, amend the definition of elderly, determine the term and content of HAP contracts, and determine subsidy levels for tenant-based assistance that differ from the currently mandated program requirements and implementing regulations.

### Rent Reform/Term Limit Information

#### Impact Analysis

Updates to this activity are being proposed to adjust the Path to Success family contribution calculation. This is consistent with previous practice and aligns with the City of San Diego's minimum wage. The updates to this activity will also help SDHC mitigate continuously rising Housing Assistance Payment (HAP) expenses, occurring as federal funding levels are expected to fall below current funding levels, which already are not keeping up with costs. Federal funding will continue to be insufficient to support the existing families on SDHC's Housing Choice Voucher program. These important updates will enable SDHC to continue to serve our existing households, reduce risks of voucher terminations, and maintain the MTW statutory requirement to serve substantially the same number of households. These updates will impact most households' family contribution amounts. SDHC will monitor changes to total family contribution, HAP expenses, hardship requests, and other variables that will help track the activity and any unintended consequences or impacts. SDHC will then reevaluate the activity to determine whether it should be adjusted, while also considering voucher funding levels and potential voucher termination risks.

#### Elderly/Disabled Households

There currently are about 9,363 Elderly/Disabled households in the program. Of those, 835 households have zero income and would see no change to their family contribution. A total of 8,528 households would experience an increase in their family contribution amounts between \$1 and \$349 per month. Households with higher annual incomes will experience a larger increase in their family contribution amount, as 3.5% of a greater income result in a higher contribution.

| Family contribution Increase Per Month | # of HHs     |
|----------------------------------------|--------------|
| \$0 - \$99                             | 8,713        |
| \$100 - \$199                          | 617          |
| \$200 - \$299                          | 31           |
| \$300 - \$350                          | 2            |
| <b>Total</b>                           | <b>9,363</b> |

#### Workable Households

**Population Types:** Work Able 2 households who have more than 2 workable household members would see an update to their population type. About 405 households will be updated to the Work-Able 3 population type.

**Family Contribution Calculation:** Family contribution will no longer be calculated using a tiered income table. Work Able households' family contribution will be determined by calculating 40% of their adjusted annual income, including any amount that exceeds the applicable payment standard. Work-Able households who have an adjusted annual income where 40% of their income is greater than the proposed minimum family contribution would experience an increase in

### SECTION III – PROPOSED MTW ACTIVITIES: HUD APPROVAL REQUESTED



their rent burden percentage between 10 to 16 percent. This is because households whose incomes are currently at the higher end of the tiered income table have a family contribution amount of 24-25%, and households whose incomes are currently at the lower end of the tiered income table have a family contribution amount of 29-30%. Households who will experience a greater family contribution increase are generally households with a higher annual income who are currently at the higher end of the tiered income table and currently have a lower family contribution percentage.

#### Work Able households not at minimum family contribution

| Family Contribution Increase Per Month | # of HHs     |
|----------------------------------------|--------------|
| \$100 - \$199                          | 85           |
| \$200 - \$299                          | 499          |
| \$300 - \$399                          | 678          |
| \$400 - \$499                          | 689          |
| \$500 - \$599                          | 518          |
| \$600 - \$699                          | 298          |
| \$700 - \$799                          | 161          |
| \$800 +                                | 132          |
| <b>Total</b>                           | <b>3,060</b> |

**Minimum Family Contribution:** Minimum family contributions under Path to Success are tied to the local minimum wage. The minimum family contribution has not been updated since January 2020, when the local minimum wage was \$13.00 per hour. The local minimum wage effective January 2026 will be \$17.75 per hour (an increase of 33%). Work-Able households will be subject to the minimum family contribution if 40% of their adjusted annual income is less than the proposed updated minimum family contribution amounts. Analysis indicates that 1,890 households may be subject to the minimum family contribution. Their monthly family contribution will increase between \$100 - \$1,700. Some households may experience a higher family contribution increase because they are at the current minimum family contribution as a Work-Able 2 household and with the updates will become a Work-Able 3 household at the updated minimum family contribution.

| Family Contribution Increase Per Month | # of HHs    |
|----------------------------------------|-------------|
| \$100 - \$199                          | 847         |
| \$200 - \$299                          | 2           |
| \$300 - \$399                          | 8           |
| \$400 - \$499                          | 125         |
| \$500 - \$599                          | 506         |
| \$600 - \$699                          | 57          |
| \$700 - \$799                          | 57          |
| \$800 - \$899                          | 57          |
| \$900 - \$999                          | 46          |
| \$1,000+                               | 185         |
| <b>Total</b>                           | <b>1890</b> |

#### Transition Period

SDHC acknowledges that the Path to Success updates included in this Plan may have significant impacts to households and will provide households with as much advance notice as possible to encourage households to prepare and utilize SDHC's Achievement Academy services, as well as other local community services in preparation. SDHC's plan is to implement the Path to Success updates once the activity is approved by HUD. Exact timing will be determined by a number of factors, including a reasonable noticing period. Noticing to families will begin as soon as the MTW Plan Amendment is approved by HUD. Notices will be provided to households periodically before implementation, including a final notice prior to implementation. The noticing will include information on the policy updates, why the updates were necessary in order to



address significant funding challenges, and how it may impact households. All notices will include referrals to SDHC's Achievement Academy or other partnerships with nonprofit organizations for services, including work readiness, job placement, job skills, and personal finance education, such as budgeting and credit, to help households increase their income in preparation for the updates.

### **Hardship Case Criteria**

The primary objective of the activity updates is to continue the practice of periodically updating minimum family contribution amounts for Work-Able households in alignment with the local minimum wage, to make adjustments to the calculation percentages for Work-Able households that pay more than the minimum family contribution, and for all Elderly/Disabled households (there will be no minimum family contribution amount for Elderly/Disabled households), and to address rising HAP expenses and funding uncertainties with a goal to prevent voucher terminations. However, some households may experience a significant impact on their family contribution. The hardship policies have been updated to address the updated rent-reform policies in this activity. The policies aim to address households with significant impacts while still maintaining the primary objective of the activity.

**Path to Success Hardship:** This hardship policy will address hardships experienced by Workable Households who are subject to the minimum family contribution. Impact analysis shows that some of these households may experience a significant increase in their family contribution portion due to their low annual income. All other Workable households and Elderly/Disabled households will see an increase in their family contribution portion that will bring their shelter burden up to 40% of annual income for workable households, and 32% for Elderly/Disabled households. As such, these households will not be eligible for this hardship. (Please note: hardships related to a change of circumstance that directly impacts a household's income are addressed in a separate MTW activity related to Interim recertifications).

Work Able 1 and 2 households who have at least 1 dependent and are at minimum family contribution will be eligible to apply for a hardship. If the household has a shelter burden greater than 50%, they will be approved for a one-time, six-month hardship. Their family contribution will be adjusted to the greater of \$50, their previous family contribution, or 50% of their adjusted income. While on the hardship, the households will be required to sign a document consenting to participate in required self-sufficiency activities, which may include attending work-readiness classes, applying for benefits, regaining employment, etc. The households will be referred to the SDHC Achievement Academy to work with a Work Readiness Specialist during their hardship.

**Zero Income:** Any household whose income decreases to zero will have a \$50 family contribution portion if the loss is through no fault of their own. The exemption will have a duration of six months maximum, after which time, their family contribution will default to the applicable minimum family contribution. Work-Able, zero-income households will be required to sign a document consenting to participate in required self-sufficiency activities, which may include attending work-readiness classes/workshops, applying for benefits, regaining employment, etcetera. The households will be referred to the SDHC Achievement Academy to work closely with a Work Readiness Specialist during the temporary hardship exemption. At the point the exemption ceases, the household will be responsible to pay a family contribution portion calculated using Path to Success methodology.

### **Description of Annual Reevaluation**

SDHC will regularly monitor changes to family contribution, HAP expense, hardship requests, and other variables that will help track the activity and any unintended consequences or impacts. SDHC will then reevaluate the activity to determine whether it should be adjusted, while also taking into consideration voucher funding levels and potential voucher termination risks.



## SECTION IV – APPROVED MTW ACTIVITIES

### IMPLEMENTED ACTIVITIES

|                                                                                                     |    |
|-----------------------------------------------------------------------------------------------------|----|
| 2025-2. Expedited Eligibility and Leasing Exceptions.....                                           | 18 |
| 2025-1. Rental Assistance Rent Reasonableness .....                                                 | 18 |
| 2022-1. Homeownership Program.....                                                                  | 18 |
| 2021-2. Preservation of Affordable Housing in the City of San Diego .....                           | 19 |
| 2021-1. Establishment of Alternative Reasonable Cost Limits .....                                   | 19 |
| 2020-1. Landlord Retention and Incentive Program.....                                               | 20 |
| 2018-1. Moving Home: A Rapid Rehousing Program.....                                                 | 21 |
| 2017-1. The Moving On Program.....                                                                  | 18 |
| 2016-3. Homeless Shelter Beds .....                                                                 | 19 |
| 2016-2. The Guardian Scholars Program .....                                                         | 19 |
| 2016-1. The Monarch School Project.....                                                             | 23 |
| 2015-1. Modify the 40 Percent Rent Burden Requirement.....                                          | 23 |
| 2014-2. Local Income Inclusion.....                                                                 | 24 |
| 2013-6. Transitional Project-Based Subsidies for Persons Experiencing Homelessness.....             | 24 |
| 2013-4. Public Housing: Flat Rent Elimination .....                                                 | 25 |
| 2013-2. Family Self Sufficiency Reinvention .....                                                   | 25 |
| 2013-1. MTW VASH Program .....                                                                      | 25 |
| 2012-3. Modify Full-Time Student Definition .....                                                   | 26 |
| 2012-2. Biennial Reexamination Schedule.....                                                        | 26 |
| 2012-1. Path to Success .....                                                                       | 27 |
| 2011-8. Sponsor-Based Subsidies for Persons Experiencing Homelessness.....                          | 27 |
| 2011-7. Development of Public Housing Units Using a Combination of Funds .....                      | 28 |
| 2011-6. Modify EIV Income Review Schedule.....                                                      | 29 |
| 2011-4. Affordable Housing Development .....                                                        | 29 |
| 2011-3. Two Year Occupancy Term for PBV Tenants.....                                                | 30 |
| 2011-2. Authorize Commitment of PBV to SDHC-Owned Units .....                                       | 30 |
| 2011-1. Allow Lower Rents for Non-Assisted Units in SDHC Owned Developments.....                    | 30 |
| 2010-9. Expand the Project-Based Voucher Program.....                                               | 31 |
| 2010-7. Adopt a Local Interim Certification Policy.....                                             | 29 |
| 2010-6. Simplify Income and Asset Verification Systems .....                                        | 33 |
| 2010-5. Standardize Utility Allowances .....                                                        | 34 |
| 2010-4. Choice Communities .....                                                                    | 34 |
| 2010-2. Authorize SDHC to Inspect and Determine Rent Reasonableness for SDHC Owned Properties ..... | 35 |
| 2010-1. Implement a Revised Inspection Protocol .....                                               | 35 |



## 2025-2. EXPEDITED ELIGIBILITY AND LEASING EXCEPTIONS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2025   | Not Yet Implemented | N/A                  |

### Activity Description

Through this activity, SDHC aims to build upon previous waivers and expand on the Housing Opportunities through Modernization Act (HOTMA) self-certifications to continue streamlining processes for new admissions to allow eligibility determinations and approval of housing to be completed in the shortest times possible and to strengthen the City of San Diego's efforts to address the housing crisis. This is essential to place vulnerable households into the limited supply of housing as it becomes available in San Diego. SDHC plans to streamline the processes for verification of legal identity and verification of income.

### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2025-1. RENTAL ASSISTANCE RENT REASONABLENESS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2025   | January 1, 2025     | N/A                  |

### Activity Description

This activity limits project-based voucher (PBV) rents to the lowest of the payment standard or rent reasonableness. This activity will further enhance a participant's ability to maintain stability in their housing and may prevent terminations or evictions and facilitate a more contestant and predictable tenant rent.

### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2022-1. HOMEOWNERSHIP PROGRAM

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2022   | October 1, 2021     | N/A                  |

### Activity Description

Using Broader Use of Funds Authority, this Local Non-Traditional activity authorizes SDHC to utilize MTW funding toward its existing first-time homebuyer programs in order to assist families under 80% AMI in being able to purchase a home in the City of San Diego. The activity also offers deferred down-payment assistance loans, closing cost grants, and mortgage credit certificates. It is not anticipated that MTW funds would be used consistently, but on an as-needed basis when funding is not adequate, or there is a need for the program to be expanded.





### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2021-2. PRESERVATION OF AFFORDABLE HOUSING IN THE CITY OF SAN DIEGO

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2021   | October 1, 2020     | N/A                  |

### Activity Description

SDHC is committed to preserving affordable housing within the City of San Diego, by developing methods of financing to incentivize property owners to preserve their existing affordable housing units. This Local Non-Traditional, Property-Based activity provides financing for the preservation and rehabilitation of properties that are not owned by SDHC. Financing received through SDHC will help these property owners complete necessary health and safety upgrades to dwelling units that could normally be cost-prohibitive, leading to an increase in rent for tenants. In receiving this funding, it is ensured that properties receiving SDHC funds remain affordable to low-income families for the foreseeable future.

### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2021-1. ESTABLISHMENT OF ALTERNATIVE REASONABLE COST LIMITS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2021   | October 1, 2020     | N/A                  |

### Activity Description

SDHC received authorization to develop alternative reasonable cost limits to include Total Development Costs (TDC) and Hard Construction Costs (HCC) for the amount of Moving to Work funds that can be contributed in SDHC's local non-traditional development and rehabilitation activities. Over the past several years, the San Diego metropolitan area had seen massive increases in the cost to develop and rehabilitate new and existing properties.

SDHC had also seen multiple projects far exceed the HUD-published limits for the San Diego region, as the Rental Housing Finance Division is a lender, conduit bond issuer, and administrator of the City of San Diego's affordable land use programs including the Inclusionary, Density Bonus, Single-Room Occupancy, and Coastal Replacement Housing ordinances. In seeking an alternative reasonable cost formula, SDHC will be able to increase its ability to ensure that more affordable units are developed or rehabilitated within the City of San Diego, which in turn will increase the number of housing choice for low-income families in support of the MTW Statutory Objective.

### Activity Updates

- FY 2023: The alternative reasonable cost limits were updated from the FY 2021 figures using the approved activity methodology.



**Planned Non-Significant Changes**

None

**Planned Significant Changes**

None

**2020-1. LANDLORD RETENTION AND INCENTIVE PROGRAM**

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2020   | July 1, 2019        | N/A                  |

**Activity Description**

The Landlord Partnership Program (LPP) aims to expand rental opportunities for families holding housing choice vouchers. This is accomplished by providing both financial and supporting incentives to landlords who rent to HCV Program participants within the City of San Diego in order to increase landlord participation. Incentives are designed to recruit new landlords and units as well as retain existing units within the portfolio of available housing. Strategies and incentives may include the following:

- **Incentive Payments:** Lump sum payment issued to Landlords for leasing to a SDHC HCV family within SDHC jurisdiction.
- **Landlord Partnership Assurance Fund:** For damages caused by tenant beyond normal wear and tear or failure to pay rent, landlords may request assurance funds to cover expenses that exceed security deposits. Landlords can access assurance funds only within first two years of new tenancy.
- **Move flexibility allowance:** In the instance of a tenant vacating a subsidized unit to move to a new unit, SDHC may cover up to five days of HAP overlap, regardless of move month, to ensure neither landlord is harmed in the process.
- **Simplified inspections:** As part of SDHC's Biennial Inspections Activity, qualified units are subject to biennial inspections instead of annual inspections. In order to ensure housing units maintain biennial status, a quality assurance (QA) plan with random QA inspections was established. These inspections are conducted with the same protocol as a regular inspection. Upon successful results, SDHC will consider the QA inspection as a successful biennial inspection.
- **Pre-Inspections:** For prospective landlords, SDHC will pre inspect vacant units and provide 60-day inspection validation.
- **Landlord Liaison team:** SDHC established a specialized team to provide quality customer service to landlords. The team is responsible for monitoring all program incentives and conducting annual program reviews with recommendations to enhance program.
- **Participant Assistance:** A dedicated team supports families in the process to ensure timely lease ups.
- **Other eligible expenses:** In FY 2022, SDHC also included other eligible expenses related to the leasing of units and recruitment/retention of HCV owners to facilitate the successful leasing and use of housing vouchers by families. This may include, but is not be limited to, application fees, processing fees, holding deposits, landlord recruitment and incentive payments, such as unit hold payments, to assist families with various up-front costs for leasing units in an expedited manner.

**Activity Updates**

- FY 2023: SDHC will determine maximum award for Landlord Partnership Assurance Fund per tenancy. The maximum will be determined by SDHC using the local market averages and may be adjusted for inflation.
- FY 2022: SDHC will include other eligible expenses related to the leasing of units and recruitment/retention of HCV owners. This may include, but not be limited to, application fees, processing fees, holding deposits, landlord recruitment and incentive payments such as unit hold payments.

**Planned Non-Significant Changes**

None

**Planned Significant Changes**

None

**2018-1. MOVING HOME: A RAPID REHOUSING PROGRAM**

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2018   | February 1, 2018    | 2024                 |

**Activity Description**

Using Broader Uses of Funds authority, this rapid re-housing program provides housing subsidies to individuals and households experiencing homelessness and ensures an array of resources are available to stabilize and maintain housing while working towards financial independence. Moving Home aims to reduce the length of time San Diegans remain in homeless shelters and increase the availability of beds for other persons experiencing homelessness requiring immediate shelter, while also reducing the public and personal costs of homelessness.

The activity was expanded in 2024 to include a rapid stabilization component for individuals and households who are experiencing a significant housing instability and are considered highly or especially vulnerable should they lose their housing.

**Activity Updates**

- FY 2024: The activity was repropose to include a rapid stabilization component for individuals and households who are experiencing a significant housing instability.
- FY 2020: The program MTW budget was increased to \$5 million.

**Planned Non-Significant Changes**

None

**Planned Significant Changes**

None

**2017-1. THE MOVING ON PROGRAM**

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2017   | January 1, 2018     | N/A                  |

**Activity Description**

Using Broader Uses of Funds Authority, this local non-traditional activity allows SDHC to create a pilot program to provide housing subsidy to households previously experiencing homelessness transitioning from permanent supportive housing due to obtaining stability and the decreased need for intensive case management and services. The Moving On Program supports tenants who are successful in their long term housing stabilization to live more independently using a federal subsidy while accessing community based resources, as needed. Additionally, this program frees up valuable permanent supportive housing and services for persons experiencing homelessness in need of these resources.

**Activity Updates**

None

**Planned Non-Significant Changes**

None

**Planned Significant Changes**

None



### 2016-3. HOMELESS SHELTER BEDS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2016   | July 1, 2019        | N/A                  |

#### Activity Description

SDHC received approval under Broader Uses of Funds Authority to subsidize shelter beds in the City of San Diego. Shelter programs serve a variety of needs and subpopulations, and SDHC will ensure that programs supported under this MTW activity will not negatively impact SDHC's statutory requirement to serve substantially the same households in its federally approved and funded programs. SDHC and regional partners have identified, similar to housing interventions, that a continua of options is needed to engage certain subpopulations, especially those that are historically hesitant to enter traditional congregate shelter. This approach aligns with the goals and practices set forth in the Community Action Plan on Homelessness for the City of San Diego. All contracted programs are required to follow Housing First principles as detailed in contracted scopes of work. In alignment with national best practices to provide low barrier shelter access, only criminal history related to life-time sex offender status and convictions resulting from manufacturing methamphetamine in federally assisted housing will be considered.

#### Activity Updates

- FY 2024: SDHC may provide MTW funding for homelessness sector program/services to provide shelter services and to develop and/or acquire new traditional congregate or alternative safe sheltering sites.
- FY 2022: SDHC will provide MTW funding to shelter providers through a competitive process, to develop and/or acquire new family congregate sites. In addition, the program budget will be increased to \$12.8 million, based on an average cost of \$52.06 per night.
- FY 2020: The program MTW budget was increased to \$8 million.

#### Planned Non-Significant Changes

None

#### Planned Significant Changes

None

### 2016-2. THE GUARDIAN SCHOLARS PROGRAM

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2016   | August 1, 2016      | N/A                  |

#### Activity Description

Using Broader Uses of Funds Authority, this local non-traditional activity is a partnership with the San Diego State University (SDSU) to assist students enrolled in The Guardian Scholars Program with housing. The target populations include former foster care youth, wards of the court, and unaccompanied homeless youth. SDHC provides \$200,000 annually and matches up to an additional \$400,000 of philanthropic funds for an aggregate total of \$600,000 annually.

The Guardian Scholars Program at SDSU is a holistic support program committed to serving students are identify as current or former foster youth, wards of the court, under legal guardianship, or unaccompanied homeless youth by supporting their transition to, through and beyond SDSU.

#### Activity Updates

- FY 2023: SDHC will determine how frequently it will revisit, based on market trends and funding availability, the compensation to award the program.
- FY 2021: A modified alternate HQS policy will be used for the units funded through the program.

#### Planned Non-Significant Changes

None

**Planned Significant Changes**

None

**2016-1. THE MONARCH SCHOOL PROJECT**

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2016   | January 1, 2016     | 2020                 |

**Activity Description**

Using Broader Uses of Funds Authority, this local non-traditional activity created a pilot program to provide housing subsidies to families experiencing homelessness with minors enrolled in Monarch School. The Achievement Academy delivers work readiness services to the adult family members. This activity aims to increase self-sufficiency and academic success by providing a stable living situation while ensuring families receive an array of services.

The Monarch School is a public/private partnership between the San Diego County Office of Education and the Monarch School Project, a local non-profit agency. Since 1988, Monarch serves approximately 300 students annually and offers K-12 learning while delivering supportive services. Monarch removed barriers typically encountered by students experiencing homelessness and provides programs and services not offered at traditional public schools.

**Activity Updates**

- FY 2024: In order to prevent housing instability and encourage self-sufficiency for families participating in the Monarch Program, SDHC updated its administrative plan to detail that SDHC may provide continued assistance to families even if they no longer have a student enrolled in the Monarch School. If a family moved to a different school district or the youngest child has completed 12th grade and/or is no longer attending school continuously, SDHC will determine the appropriateness of future rental assistance and supportive services that best meets the family's needs as outlined in the SDHC Administrative Plan for the Section 8 Rental Assistance Program.
- FY 2020: Activity was re-proposed to broaden the initiative to allow for permanent supportive housing as required.
- FY 2018: Activity now utilizes the Coordinated Entry System (CES) for programmatic referrals.

**Planned Non-Significant Changes**

None

**Planned Significant Changes**

None

**2015-1. MODIFY THE 40 PERCENT RENT BURDEN REQUIREMENT**

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2015   | February 1, 2015    | N/A                  |

**Activity Description**

This activity modifies the 40 percent affordability cap to 50 percent at initial lease-up in order to increase housing choice for low-income households.

**Activity Updates**

None

**Planned Non-Significant Changes**

None

**Planned Significant Changes**

None



## 2014-2. LOCAL INCOME INCLUSION

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2014   | November 1, 2013    | N/A                  |

### Activity Description

This activity allows for an alternate rent calculation methodology. Income from Kin-GAP, foster care payments, and adoption assistance payments are included in the determination of the household's annual adjusted income for the purposes of determining the household's rent portion. These sources of income will not be included when calculating income to determine initial program eligibility.

### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2013-6. TRANSITIONAL PROJECT-BASED SUBSIDIES FOR PERSONS EXPERIENCING HOMELESSNESS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2013   | January 1, 2013     | N/A                  |

### Activity Description

Using Broader Uses of Funds Authority, this local non-traditional activity allows SDHC to partner with agencies to craft a short-term transitional housing program offering rapid re-housing, using flat project-based subsidies paired with supportive services that are offered by the provider agency. SDHC is currently partnering with PATH, Episcopal Community Services, and Senior Community Center in this endeavor.

### Activity Updates

- FY 2024: Project Based subsidies for these programs will be awarded on a competitive basis. The exception will be if the program is housed in an SDHC-owned and/or SDHC-controlled development (for example, long-term master lease) in which case the subsidy will be awarded non-competitively, per a prior HUD-approved MTW activity.
- FY 2022: SDHC revised the maximum subsidy to be aligned with the HCV housing assistance payments per unit cost (PUC) per bed, and this may be adjusted periodically to account for rising costs of administering the program including, but not limited to, rising rental costs.
- FY 2020: A modified HQS policy will be used for the beds funded through the program.
- FY 2016: Due to the success of the activity, SDHC is expanding the program to include funding beds in addition to unit. The maximum subsidy is \$700 per bed. The target populations are expanded to include homeless veterans and victims of human trafficking.
- FY 2015: RFP solicitation process to include for-profit entities in addition to non-profit entities. Additionally, SDHC may award the subsidies to an SDHC-owned development without a competitive process. Partnering agencies may utilize the VI-SPDAT model to refer applicants for the housing program.

### Planned Non-Significant Changes

None

### Planned Significant Changes

None



### 2013-4. PUBLIC HOUSING: FLAT RENT ELIMINATION

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2013   | August 1, 2014      | N/A                  |

#### Activity Description

This activity eliminates flat rents in public housing in order to facilitate the implementation of Path to Success for public housing residents. The activity utilizes waivers allowing SDHC to determine alternative rent policies within the public housing program.

#### Activity Updates

None

#### Planned Non-Significant Changes

None

#### Planned Significant Changes

None

### 2013-2. FAMILY SELF SUFFICIENCY REINVENTION

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2013   | July 1, 2013        | 2015                 |

#### Activity Description

This activity modifies the Family Self-Sufficiency (FSS) program by revising the contract term and the escrow calculation method to coincide with the Path to Success initiative. Changes to the program include a \$10,000 maximum on total escrow accumulation, escrow deposits based on outcomes achieved, and a two-year contract term with the option to extend the contract an additional three years if additional time is needed to attain goals.

#### Activity Updates

- FY 2026: The maximum total escrow accumulation increased to \$50,000.
- FY 2022: HUD published the FSS Program Final Rule effective June 16, 2022. SDHC adopted the final rule but kept the flexibilities approved under this existing activity.
- FY 2015: The activity was re-proposed to allow an adult household member to enroll in the program as the sole participant.
- FY 2014: The FSS Action Plan detailing the flat escrow deposit feature of the program is pending submission to HUD for approval. The flat escrow deposit schedule containing the outcomes and the corresponding deposit amounts will be further described in the Fiscal Year 2013 MTW Annual Report.

#### Planned Non-Significant Changes

None

#### Planned Significant Changes

None

### 2013-1. MTW VASH PROGRAM

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2013   | August 1, 2012      | 2025                 |

#### Activity Description

On May 27, 2010 SDHC received regulatory and statutory waivers from the Housing Voucher Management and Operations Division of HUD for administration of the HUD-VASH Voucher Program using certain elements of MTW authority. This

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activity allows SDHC to use its MTW flexibilities to implement policies to ease administration and provide benefits to VASH participants, while ensuring that VASH protections remain.

- **Criminal History Review:** VASH applicants are subject to a less stringent review of criminal history than all other HCV program applicants. However, when a VASH applicant or participant wishes to add a member to the household, the new member is held to the higher standard. Under this activity, any adult the VASH applicant or participant wishes to add to the household has a reduced criminal history initial requirement: no violent or drug-related criminal activity in the two years preceding application. The reduced criminal history requirements for family members still preclude individuals from participating in the program if subject to registration as a sex offender.
- **Minimum Rents:** Minimum rents for VASH participants is zero dollars for the duration of their time in the program. All other aspects of how a tenant's rent portion is calculated will remain the same.
- **Income Garnishments:** Income garnishments are not counted as income for the first 12 months of program participation if requested by the applicant.
- **Utility Reimbursements:** Utility reimbursements are not a part of the SDHC VASH program to coincide with SDHC's rental assistance program administration.
- **Biennial Inspection Cycle:** VASH participants are eligible for the biennial inspection cycle to coincide with SDHC's rental assistance program administration.
- SDHC received approval on April 1, 2020 to have VASH payment standards tied to 120% of payment standards.

### Activity Updates

- FY 2025: The minimum rent for VASH participants was eliminated.

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2012-3. MODIFY FULL-TIME STUDENT DEFINITION

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2012   | December 1, 2011    | N/A                  |

### Activity Description

This activity modifies the definition of full-time student to include only students aged 18 to 23 who are not the head, spouse, or co-head. Household members meeting the revised full-time student definition will receive a 100 percent employment income exclusion. All students, regardless of age or familial status, will be eligible for a graduation incentive wherein proof of graduation can be submitted in exchange for a monetary award. The activity utilizes waivers allowing SDHC to calculate rents using alternative methodologies.

### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2012-2. BIENNIAL REEXAMINATION SCHEDULE

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
|--------------------|---------------------|----------------------|

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|                  |              |     |
|------------------|--------------|-----|
| Fiscal Year 2012 | July 1, 2012 | N/A |
|------------------|--------------|-----|

### Activity Description

This activity provides authorization for a biennial reexamination schedule. All households in Path to Success, HUD special purpose vouchers, Project Based Vouchers, and SDHC's Local Non-Traditional rent subsidy programs are on a biennial reexamination schedule. Any changes in payment or subsidy standards and/or voucher size will be applied for households beginning no later than the earliest of:

1. The effective date of an increase in the gross rent that would result in an increase in the family share;
2. The family's first regular or interim reexamination.

### Activity Updates

- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2016: The Elderly/Disabled population converted to a biennial reexamination schedule effective July 1, 2015.

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2012-1. PATH TO SUCCESS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE                                          | PLAN YEAR(S) AMENDED |
|--------------------|--------------------------------------------------------------|----------------------|
| Fiscal Year 2012   | July 1, 2013 (Rent Reform)<br>November 1, 2013 (Portability) | 2014, 2019, 2024     |

### Activity Description

Path to Success is a comprehensive rent reform activity that utilizes a tiered rent structure with progressive increases to minimum rents for Work-Able families. Families defined as Elderly/Disabled receive streamlining measures only. The activity also eliminates deductions and streamlines allowances for both populations.

### Activity Updates

- FY 2024: The activity was re-proposed to modify the age of elderly from 55 years to 62 years.
- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2019: The activity was re-proposed to increase minimum rents for Work-Able families and modify income bands to \$5,000 for all ranges.
- FY 2014: The activity was re-proposed to include a local portability policy. The local portability policy component of the activity was implemented effective November 1, 2013. The standard HCV calculation may be used in PBV complexes serving special needs populations.

### Planned Non-Significant Changes

None

### Planned Significant Changes

This activity is being re-proposed in this plan amendment in Section III.

## 2011-8. SPONSOR-BASED SUBSIDIES FOR PERSONS EXPERIENCING HOMELESSNESS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2011   | July 1, 2011        | 2013, 2017           |

### Activity Description



## SECTION IV – APPROVED MTW ACTIVITIES



This local, non-traditional activity uses Broader Uses of Funds Authority to provide subsidies to individuals experiencing homelessness. The program works in partnership with non-profit organizations to combine comprehensive supportive services with permanent housing. Examples of services provided include outreach, case management, job skills and employment training, health and wellness education, and legal assistance. Sponsor based vouchers differ from project-based vouchers by allowing the vouchers to be attached to a sponsoring agency rather than a unit or development. The following components are included in this program:

1. 1,000 subsidies are allocated to the program.
2. Participants are not provided with a tenant-based Housing Choice Voucher upon exiting the program.
3. The rent portion is calculated at 28.5 percent of gross monthly income (no allowances or deductions).
4. SDHC may apply the Path to Success rent calculation structure to a specific allocation of subsidies.
5. The populations served under this program were expanded to include individuals and families.
6. Subsidies may be utilized as tenant-based subsidies or using a project-based structure, although the assistance remains connected to the sponsoring agency.
7. Subsidies may fund individual units, beds, or rooms. Rooms may be located in a group home, serving minors with adequate oversight provided by the sponsor.
8. Subsidies may be awarded to SDHC without a competitive process.
9. Both non-profit and for-profit organizations may be awarded subsidies under a competitive process. An exception to this policy is the ability to award non-competitively if previous solicitations do not yield viable opportunities to award the subsidies.

### Activity Updates

- FY 2017: Re-proposed the activity to streamline the subsidy calculation process using Path to Success rent calculations and expands the populations served to include individuals and families.
- FY 2016: RFP solicitation process includes for-profit entities in addition to non-profit entities. Additionally, SDHC may award subsidies to an SDHC-owned development without a competitive process. Partnering agencies may utilize the VI-SPDAT model to refer applicants for the housing program. Due to the success of the activity, SDHC is expanding the program to include funding beds in addition to units. A modified alternate HQS policy will be used for the beds funded through the program.
- FY 2013: Re-proposed to allow SDHC to allocate additional vouchers to the program, broaden the definition of homelessness, and apply MTW flexibilities to the rent calculation methodology.

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2011-7. DEVELOPMENT OF PUBLIC HOUSING UNITS USING A COMBINATION OF FUNDS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2011   | July 1, 2010        | N/A                  |

### Activity Description

This activity allows SDHC to develop additional public housing through acquisition or rehabilitation using a combination of funds without a competitive process.

### Activity Updates

- FY 2014: Waivers corrected in the FY 2012 Report to include: MTW Agreement Attachment C, Section B(1)(b)(ii), B(1)(b)(vii) and B(1)(b)(viii) containing waivers of Section 8 and 9(g)(3) of the 1937 Act and 24 CFR 982 and 990. MTW Agreement Attachment C, Section C(13) containing waivers of 24 CFR 941.40.
- FY 2013: This activity was combined with the FY 2010 Public Housing Development Activity.

## SECTION IV – APPROVED MTW ACTIVITIES



### Planned Non-Significant Changes

None

### Planned Significant Changes

None

### 2011-6. MODIFY EIV INCOME REVIEW SCHEDULE

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2011   | August 1, 2010      | N/A                  |

#### Activity Description

This activity allows SDHC to utilize the EIV report only when processing full reexaminations of household composition, income, and assets according to the Biennial Reexamination Cycles. Waivers allow SDHC to adopt and implement policies for verifying family income and determining resident eligibility differing from current program requirements. The requirement to use the EIV report during interim certifications is eliminated.

#### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

### 2011-4. AFFORDABLE HOUSING DEVELOPMENT

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2011   | July 1, 2010        | 2014                 |

#### Activity Description

This local, non-traditional activity uses SDHC's Broader Uses of Funds Authority to develop affordable housing in the City of San Diego using MTW funds. The units developed may be any bedroom size and located within the City of San Diego and may be rented to families at or below 80% of Area Median Income (AMI). Methods of development include but are not limited to: acquisition, rehabilitation, preservation, funding pre-development activities, and gap financing.

#### Activity Updates

- FY 2022: Any income that is generated from SDHC-owned properties developed through this activity will be used for MTW-approved purposes like affordable housing.
- FY 2021: Any income that is generated from SDHC-owned properties developed through this initiative will be used for affordable housing purposes.
- FY 2020: SDHC is utilizing this activity to develop accessory dwelling units (ADUs) per local ordinances to increase affordable housing options in the City of San Diego.
- FY 2014: Re-proposed to expand the methods of affordable housing development.
- FY 2012: Clarify that this activity will be to preserve as well as acquire affordable housing in the City of San Diego.

### Planned Non-Significant Changes

None

### Planned Significant Changes

None



### 2011-3. TWO YEAR OCCUPANCY TERM FOR PBV TENANTS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2011   | October 1, 2010     | 2013                 |

#### Activity Description

This activity requires project-based voucher residents to complete two years of occupancy before becoming eligible to receive a tenant-based voucher, and allows SDHC to determine waiting list procedures differing from current program residents. This applies to all PBV developments except those designated as transitional housing.

#### Activity Updates

- FY 2026: The family, in any given development, must be receiving assistance to be eligible for continued tenant-based assistance. When funding is not available, families must be receiving assistance to be eligible to remain on the project based to tenant-based conversion list.
- FY 2016: The FY 2012 report increased the threshold of the vacancy policy from 15 percent to 35 percent, a percent consistent with the baseline vacancy rate. The policy changes benefit PBV households.
- FY 2013: Re-proposed activity to allow SDHC to create a policy that no more than 15 percent of the tenants in any given development who become eligible to transition to a tenant-based voucher in any given year and no more than 10 percent in any given month can move from the PBV assisted complex. The policy change was effective 2/1/2014.

#### Planned Non-Significant Changes

None

#### Planned Significant Changes

None

### 2011-2. AUTHORIZE COMMITMENT OF PBV TO SDHC-OWNED UNITS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2011   | October 1, 2010     | N/A                  |

#### Activity Description

This activity streamlines the process to commit project-based vouchers to SDHC-owned units by using waivers that allow SDHC to project-base units using a non-competitive process. This activity also allows SDHC to conduct HQS inspections and rent reasonableness determinations for SDHC-owned units in a project-based development.

#### Activity Updates

None

#### Planned Non-Significant Changes

None

#### Planned Significant Changes

None

### 2011-1. ALLOW LOWER RENTS FOR NON-ASSISTED UNITS IN SDHC OWNED DEVELOPMENTS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2011   | October 1, 2010     | N/A                  |

#### Activity Description

## SECTION IV – APPROVED MTW ACTIVITIES



This activity allows SDHC to use a revised rent reasonableness protocol to determine rent reasonableness for assisted units in developments owned by SDHC and by SDHC's limited liability companies. Rent Reasonableness for the voucher assisted units is determined by comparisons to similar units in the surrounding neighborhoods rather than within the development. For developments it owns, SDHC may charge lower rents for non-assisted units than for units assisted by a tenant-based or project-based voucher in the same complex. This would be done in circumstances to preserve or create affordable units for low income families by offering non-assisted units at below-market rents.

### Activity Updates

None

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2010-9. EXPAND THE PROJECT-BASED VOUCHER PROGRAM

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2010   | September 1, 2009   | 2015                 |

### Activity Description

This activity expands SDHC's Project Based Voucher program to increase housing choice and serve persons experiencing homelessness and low-income households in the City of San Diego. This activity includes the following flexibilities and strategies.

- Collaborate with local developers and non-profit housing providers to increase the production of affordable housing by providing project-based vouchers as long-term subsidies. The provision of supportive services may be required in the PBV development.
- Increase the range of options available to low-income households living in high-poverty areas by allowing SDHC to approve exception payment standards for PBV developments without requiring HUD approval. SDHC's jurisdiction contains pockets for neighborhoods with high FMRs, and approving exception payment standards exceeding 110% of FMR increases viable low-income housing options in affluent sectors of the City. SDHC will determine exception areas based on the average percent below the poverty line in contiguous census tracts. The average percent below the poverty line must be less than 30 percent of the published AMI in no less than two contiguous census tracts. The maximum contract rent per unit will adhere to rent reasonableness requirements and apply only in project-based developments to ensure cost effectiveness.
- Designate greater than 20 percent of SDHC's voucher allocation as PBV with a maximum allotment of 5 percent of total vouchers authorized as PBV per year.
- Expand the use of PBV by increasing the permissible percentage of subsidized units in a single development from 25 percent to 100 percent. The number of designated PBV units in a contract may increase outside of the initial term of the contract.
- In conjunction with programs such as Neighborhood Stabilization Program, SDHC may apply creative measures utilizing PBV to increase housing opportunities in vacant and foreclosed properties in the community.
- Allow for project-specific waiting lists maintained by the owners or non-profit providers in compliance with agency standards.
- SDHC and/or the developer may require the resident to participate in supportive services as a condition of tenancy.

### Activity Updates

- FY 2026: New PBV developments may use Certificate of Occupancy or Temporary Certificates of Occupancy in lieu of an initial HQS inspection for units. This allows for inspections that have been performed to satisfy Tax Credit or HOME program requirements, as well as inspections by other governmental agencies that are substantially equivalent to HQS requirements. Subsequent inspections shall follow the standard biennial HQS process. When a



family, in any given development, is determined by SDHC as occupying a wrong-size unit, or a unit with accessibility features that the family does not require, or doesn't have accessibility features it needs, and/or the unit is needed by a family that requires the accessibility features, continued housing assistance will be offered within the same development or another development with comparable supportive services, as applicable. This will ensure that families who need supportive services to maintain housing stability will continue to receive those services.

- FY 2024: In alignment with national best practices and housing first principles, engagement in supportive services is not a condition of tenancy. However, project-based programs that service special populations are expected to make available a variety of supportive services to best meet a specific population's needs. These expectations are memorialized in contract documents.
- FY 2022: New PBV developments focused on Permanent Supportive Housing (PSH) may use Certificates of Occupancy or Temporary Certificates of Occupancy in lieu of an HQS inspection for units. This allows for inspections that have been performed for satisfying Tax Credit or HOME program requirements, as well as inspections by other governmental agencies that are substantially equivalent to HQS requirements. Subsequent inspections shall follow the standard biennial HQS process.
- FY 2021: SDHC changed the rent change period from HAP anniversary month to reexamination month. This will further streamline the process by allowing rent increases to be processed concurrently with the reexamination on the optimized reexamination effective date.
- FY 2015: Re-proposed activity to adopt additional flexibilities to require residents to participate in supportive services as a condition of tenancy; allow project-specific waiting lists maintained by the owners or non-profit providers; approve exception payment standards exceeding 100 percent of the FMR without requirement HUD approval; increase the number of designated PBV units in a contract after the first three years of the contract have elapsed.

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2010-7. ADOPT A LOCAL INTERIM CERTIFICATION POLICY

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2010   | October 1, 2009     | 2012                 |

### Activity Description

This activity modifies SDHC's local interim reporting policy. The policy applies to non-elderly/non-disabled households and limits the number of interim adjustments to income to once in a 12-month timeframe. Additionally, decrease of income interims will be granted only if the loss of income is through no fault of the family, the decreased income results in a decrease to the rent portion greater than 20 percent, the decrease is not due a sanction on public assistance income, and the family provides verification of eligibility or ineligibility for unemployment benefits if the reduced income is due to loss of employment. If it is determined that a reduction of rent is warranted, the reduced rent will begin the first of the month after receipt of all verifications of decrease and any replacement income.

In order to hold elderly and disabled households harmless, including VASH and EHV households, these households may continue to report income decreases as they occur. If the income reduction will last 90 days or more and the reduction of rent is warranted, the reduced rent will begin effective the first of the following month after all verifications are received.

For all households:

When a change of family composition is reported in a timely manner, the effective date of the rent portion change are as follows:

- Income of newly added household members will be included and increases in the tenant's rent due to family changes are effective on the first of the next month, after at least 30 days' notice to the family.



- Decreases in the tenant rent are effective the first of the month following the month in which verifications are received.

When family composition change is not reported timely by the family, or when there is a mandatory reporting requirement for an income change and it is not reported timely, the effective date of the rent portion changes are as follows:

- Income of newly added household members will be included and the increase in tenant rent will be effective retroactive to the date it would have been effective had it been reported in a timely manner. The family will be liable for any overpaid HAP and may be required to sign a repayment agreement or make a lump sum payment.
- Decreases in tenant rent will be effective on the first of the month following the month that all verifications are received.

### Activity Updates

- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2018: Effective July 1, 2018, SDHC eliminated the “No Fault of Your Own” policy as a reason to deny an interim request for a decrease in the rent portion. A review and analysis of the policy indicated minimal benefits.
- FY 2015: The policy applies to work-able families as defined under Path to Success. The activity utilizes the authority to implement an interim certification protocol differing from current mandates, thus allowing for locally driven policies concerning income change interims for families categorized as “Work-Able.”
- FY 2012: Re-proposed to adopt a policy stating an interim adjustment of income will not be processed unless the change to the rent portion is greater than 20 percent and the loss of income must not occur through fault of the family. Baselines, benchmarks, and metrics were modified in the Fiscal Year 2012 Plan Amendment due to the re-proposal.

### Planned Non-Significant Changes

None

### Planned Significant Changes

None

## 2010-6. SIMPLIFY INCOME AND ASSET VERIFICATION SYSTEMS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2010   | October 1, 2009     | 2016                 |

### Activity Description

This activity simplifies the requirement to verify income and assets for housing choice voucher and public housing participants in order to reduce administrative time spent verifying income and assets and to reduce the rate of income calculation errors. The activity utilizes the authority to adopt and implement policies to calculate the rent differing from program requirements. At admission and subsequent reexaminations, SDHC accepts self-certification if participant or applicant declares assets to be less than \$100,000 and that they do not own a home suitable for occupancy by the participant or applicant. Third-party verification is not required. SDHC also accepts documents provided by applicants and participants without requiring third-party verification at admission or subsequent reexaminations.

### Activity Updates

- FY 2016: Re-proposed activity to eliminate assets from the rent calculation regardless of the method of acquisition or disposal and to disallow homeownership as criterion for program eligibility and ongoing participation.
- FY 2011: SDHC instituted an alternative data collection methodology requiring staff to only complete the tracking log for one cycle over the course of the applicable fiscal year.

### Planned Non-Significant Changes



None

#### Planned Significant Changes

None

### 2010-5. STANDARDIZE UTILITY ALLOWANCES

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2010   | January 1, 2010     | N/A                  |

#### Activity Description

The activity authorizes a simplified utility allowance structure where the utility allowance amount is based on whether or not the family is responsible for the water/sewer portion of the utilities. The standardized utility allowance schedule reduces the administrative burden related to applying the correct utility allowances during the rent calculation process as well as reduces administrative errors.

#### Activity Updates

- FY 2024: Eliminated utility reimbursement payments and removed the requirement to collect, analyze, and report information on utility responsibilities for all households participating in Path to Success.

#### Planned Non-Significant Changes

None

#### Planned Significant Changes

None

### 2010-4. CHOICE COMMUNITIES

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2010   | January 1, 2010     | 2012, 2018           |

#### Activity Description

This activity provides incentives and assistance to MTW program participants aspiring to move to areas of opportunity. SDHC uses a three-pronged approach:

- A revolving security deposit loan program for families newly admitted to the Section 8 Housing Choice Voucher Program.
- A robust mobility counseling program which offers pre- and post- moving counseling, resources and information, assistance with unit search, and guidance to families expressing interest in moving to neighborhoods of opportunity. The mobility counselor also engages in significant landlord outreach to increase landlord participation and market the housing choice voucher program.
- Increase payment standards for opportunity zip codes.

#### Activity Updates

- FY 2025: Effective July 2024, SDHC transitioned from a grouped/tiered zip code methodology to payment standards by individual zip code.
- FY 2018: Re-proposed to increase flexibility related to determining payment standards. Payment standards are informed by hypothetical SAFMRs published by HUD.
- FY 2016: A different MTW activity increased the allowable rent burden to 50 percent program wide. The 40 percent rent burden element of this activity was eliminated.
- FY 2012: Re-proposed to adopt a policy allowing SDHC to calculate payment standards below 90 percent of the FMR in high-poverty areas.

#### Planned Non-Significant Changes



None

**Planned Significant Changes**

None

## 2010-2. AUTHORIZE SDHC TO INSPECT AND DETERMINE RENT REASONABLENESS FOR SDHC OWNED PROPERTIES

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2010   | July 13, 2009       | N/A                  |

**Activity Description**

Federal regulations require a third party contractor to perform annual inspections on SDHC-owned units. This activity permits SDHC to conduct inspections and determine rent reasonableness for SDHC-owned properties.

**Activity Updates**

None

**Planned Non-Significant Changes**

None

**Planned Significant Changes**

None

## 2010-1. IMPLEMENT A REVISED INSPECTION PROTOCOL

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2010   | October 1, 2009     | N/A                  |

**Activity Description**

This activity reduces the number of required inspections by placing units on a Biennial Inspection Cycle and allowing owners to self-certify Housing Quality Standards (HQS) for minor fail items for all inspection types. The activity enables SDHC to utilize Federal expenditures more efficiently.

**Activity Updates**

- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2017: Guardian Scholars program, Monarch School Housing program, and Transitional Project-Based Subsidies for the Homeless Program placed on the biennial inspection cycle.
- FY 2016: Through the initiative, SDHC will modify the requirements to “gain entry” every 24 months to make a “first attempt to access” the unit every 24 months to comply with Federal requirements. Sponsor-Based subsidy program, Family Unification Program, and all Project Based Vouchers were placed on the biennial inspection cycle.
- FY 2015: Implemented biennial inspections cycle for all tenant-based participants, including VASH and NED programs.
- FY 2014: Results for HQS inspections occurring before implementation of the activity may not be considered for purposes of placement on the biennial inspection cycle.

**Planned Non-Significant Changes**

None

**Planned Significant Changes**





None



## NOT YET IMPLEMENTED ACTIVITIES

## 2023-1. BLENDED SUBSIDIES IN FAIRCLOTH-TO-RAD CONVERSIONS

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED |
|--------------------|---------------------|----------------------|
| Fiscal Year 2023   | Not Yet Implemented | N/A                  |

**Activity Description**

SDHC received permission for blended subsidies using MTW funds for Faircloth to RAD conversions. SDHC is actively involved in creating and preserving additional affordable housing within the City of San Diego in other approved MTW activities through acquisitions, rehabilitations, and new developments. In addition, SDHC has an active activity relating to public housing development. Documentation from the PIH office of Capital Improvements, as of September 30, 2021, showed that SDHC had an availability of 1,220 units remaining under the Faircloth limit.

SDHC is researching opportunities where a Faircloth-to-RAD conversion would be feasible. This activity would be utilized to make up the difference between the combined tenant paid portion and the RAD HAP subsidy up to the contract rent for converted units.

**Implementation Date Timeline**

None

**Status Update**

SDHC is actively reviewing options to implement this activity

**Description of Non-Significant Changes/Modifications Since Approval**

None

## ACTIVITIES ON HOLD

## 2010-8. ESTABLISH AN HCV HOMEOWNERSHIP PROGRAM

| PLAN YEAR APPROVED | IMPLEMENTATION DATE | PLAN YEAR(S) AMENDED | HOLD DATE    |
|--------------------|---------------------|----------------------|--------------|
| Fiscal Year 2010   | October 1, 2009     | N/A                  | July 1, 2014 |

**Activity Description**

This activity assisted income-eligible HCV participants with purchasing a home. Housing assistance payments are utilized to assist with a mortgage payment rather than as a rental payment. Incentives to purchase a foreclosed home are also program components. Waivers were enacted to modify the eligibility requirements for the program related to the minimum monetary threshold for savings accounts as well as implement the incentives for purchasing foreclosed homes.

**Reason Placed on Hold**

The program was placed on hold due to decreasing housing stock and the resulting increasing housing prices, thus creating a housing market no longer accessible to low-income Housing Choice Voucher participants. New applications were no longer accepted effective July 1, 2014. Families currently participating in the program continue to receive assistance.

**Status Update**

None

**Anticipated Reactivation Timeline**

SDHC will evaluate the program annually to determine the feasibility of re-activating the program. Criterion to be evaluated will include the level of available housing stock, median housing process, and the administrative capacity to increase the number of Housing Choice Voucher homeowners.

**Explanation of Non-Significant Changes/Modification**

Not Applicable



**CLOSED OUT ACTIVITIES**

|                                                                                        |    |
|----------------------------------------------------------------------------------------|----|
| 2014-4. Housing Subsidy Program for Homeless Youth.....                                | 39 |
| 2014-1. Transitional Subsidy Program for Homeless Veterans.....                        | 39 |
| 2013-9. New Public Housing Transition .....                                            | 39 |
| 2013-5. Homeless Veteran Project-Based Subsidy Program .....                           | 39 |
| 2013-3. Elimination of 100% Excluded Income from the Income Verification Process ..... | 39 |
| 2012-4. Project-Based Subsidy Program for the Homeless .....                           | 40 |
| 2011-10. Broader Uses of Funds for IDAs .....                                          | 40 |
| 2011-9. Enhance Family Self-Sufficiency Program .....                                  | 40 |
| 2011-5. Disregard Retirement Accounts.....                                             | 40 |
| 2010-10. Undertake Public Housing Development.....                                     | 40 |
| 2010-3. Triennial Reexaminations for Elderly and Disabled Households .....             | 40 |
| 2009-1. Achievement Academy of the San Diego Housing Commission .....                  | 41 |



## CLOSED OUT ACTIVITIES

|                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                             |                                          |
|-----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|
| <b>2014-4. HOUSING<br/>SUBSIDY PROGRAM<br/>FOR HOMELESS<br/>YOUTH</b>                                           | <b>PLAN YEAR APPROVED:</b> 2014                                                                                                                                                                                                                                                                                                                                             | <b>IMPLEMENTATION DATE:</b> N/A          |
|                                                                                                                 | <b>RE-PROPOSED:</b> N/A                                                                                                                                                                                                                                                                                                                                                     | <b>DATE CLOSED OUT:</b> JULY 1, 2022     |
|                                                                                                                 | <b>DESCRIPTION</b><br>Using Broader Uses of Funds Authority, SDHC created a time-limited pilot program to provide flat housing subsidies while a partnering agency delivers supportive services such as job placement, education, training, and case management.                                                                                                            |                                          |
|                                                                                                                 | <b>REASON(S) CLOSED OUT</b><br>The activity was not implemented. SDHC published several competitive solicitations to procure a partner agency without success. Due to the inability to award a contract, SDHC closed out the activity.                                                                                                                                      |                                          |
| <b>2014-1.<br/>TRANSITIONAL<br/>SUBSIDY PROGRAM<br/>FOR HOMELESS<br/>VETERANS</b>                               | <b>PLAN YEAR APPROVED:</b> 2014                                                                                                                                                                                                                                                                                                                                             | <b>IMPLEMENTATION DATE:</b> JAN 01, 2014 |
|                                                                                                                 | <b>RE-PROPOSED:</b> N/A                                                                                                                                                                                                                                                                                                                                                     | <b>DATE CLOSED OUT:</b> OCT 01, 2014     |
|                                                                                                                 | <b>DESCRIPTION</b><br>Using Broader Uses of Funds Authority, SDHC partners with Veteran's Village of San Diego (VVSD) to craft a transitional housing program using flat subsidies paired with supportive services. SDHC provides the housing subsidy while VVSD provides the supportive services.                                                                          |                                          |
|                                                                                                                 | <b>REASON(S) CLOSED OUT</b><br>Veteran's Village of San Diego, the intended partnering agency for the program, indicated a preference to pursue an alternative rental subsidy program.                                                                                                                                                                                      |                                          |
| <b>2013-9. NEW<br/>PUBLIC HOUSING<br/>TRANSITION</b>                                                            | <b>PLAN YEAR APPROVED:</b> 2013                                                                                                                                                                                                                                                                                                                                             | <b>IMPLEMENTATION DATE:</b> N/A          |
|                                                                                                                 | <b>RE-PROPOSED:</b> N/A                                                                                                                                                                                                                                                                                                                                                     | <b>DATE CLOSED OUT:</b> SEP 30, 2013     |
|                                                                                                                 | <b>DESCRIPTION</b><br>Families transitioning out of a state-aided rental assistance program (25% TTP) to the public housing program (30% TTP) receive a transition period during which the families pay more than 25 percent but less than 30 percent of adjusted household income toward the rent portion before moving to 30 percent at the end of the transition period. |                                          |
|                                                                                                                 | <b>REASON(S) CLOSED OUT</b><br>The flexibility requested under this initiative will not be required.                                                                                                                                                                                                                                                                        |                                          |
| <b>2013-5. HOMELESS<br/>VETERAN PROJECT-<br/>BASED SUBSIDY<br/>PROGRAM</b>                                      | <b>PLAN YEAR APPROVED:</b> 2013                                                                                                                                                                                                                                                                                                                                             | <b>IMPLEMENTATION DATE:</b> N/A          |
|                                                                                                                 | <b>RE-PROPOSED:</b> N/A                                                                                                                                                                                                                                                                                                                                                     | <b>DATE CLOSED OUT:</b> SEP 30, 2013     |
|                                                                                                                 | <b>DESCRIPTION</b><br>Creates a local, non-traditional project-based subsidy pilot program to provide housing to veterans who are either not yet ready to enter a more regulated program or who temporarily exit a program. SDHC partners with Veteran's Village of San Diego for this activity.                                                                            |                                          |
|                                                                                                                 | <b>REASON(S) CLOSED OUT</b><br>Veteran's Village of San Diego determined the activity as neither economically advantageous nor viable under current circumstances and requested permission to close out the activity.                                                                                                                                                       |                                          |
| <b>2013-3.<br/>ELIMINATION OF<br/>100% EXCLUDED<br/>INCOME FROM THE<br/>INCOME<br/>VERIFICATION<br/>PROCESS</b> | <b>PLAN YEAR APPROVED:</b> 2013                                                                                                                                                                                                                                                                                                                                             | <b>IMPLEMENT DATE:</b> SEP 01, 2012      |
|                                                                                                                 | <b>RE-PROPOSED:</b> N/A                                                                                                                                                                                                                                                                                                                                                     | <b>DATE CLOSED OUT:</b> JULY 01, 2020    |
|                                                                                                                 | <b>DESCRIPTION</b><br>Removes the requirement to verify and enter excluded income into the rent calculation formula and subsequently on the HUD 50058.                                                                                                                                                                                                                      |                                          |
|                                                                                                                 | <b>REASON(S) CLOSED OUT</b><br>Activity had originally been reactivated due to the expiration of PIH Notice 2013-03. A Final Rule FR 5743-F-03 was published, reactivating the streamlining measure.                                                                                                                                                                        |                                          |

## SECTION IV – APPROVED MTW ACTIVITIES



|                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                             |
|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>2012-4. PROJECT-BASED SUBSIDY PROGRAM FOR THE HOMELESS</b>               | <p><b>PLAN YEAR APPROVED:</b> 2012</p> <p><b>RE-PROPOSED:</b> N/A</p> <p><b>DESCRIPTION</b><br/>Using Broader Uses of Funds Authority, SDHC created a program which provides a flat subsidy based on the number of authorized units in the development; all program administration is performed by the development owner with monitoring and auditing performed by SDHC.</p> <p><b>REASON(S) CLOSED OUT</b><br/>SDHC determined the program structure as not advantageous to the agency's approach to ending homelessness on the City of San Diego. Efforts are focused in other development capacities.</p>                                                                                                                                                                                                                                                                                                                                                               | <p><b>IMPLEMENTATION DATE:</b> N/A</p> <p><b>DATE CLOSED OUT:</b> DEC 31, 2014</p>          |
| <b>2011-10. BROADER USES OF FUNDS FOR IDAS</b>                              | <p><b>PLAN YEAR APPROVED:</b> 2011</p> <p><b>RE-PROPOSED:</b> N/A</p> <p><b>DESCRIPTION</b><br/>SDHC received permission to utilize MTW broader use of funds authority to subsidize IDAs not authorized by federal regulations.</p> <p><b>REASON(S) CLOSED OUT</b><br/>The activity is a Section 8 activity not requiring regulatory waivers or broader uses of funds authority, but rather single-fund flexibility. The activity is no longer active.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <p><b>IMPLEMENTATION DATE:</b> JUL 01, 2010</p> <p><b>DATE CLOSED OUT:</b> JUN 30, 2011</p> |
| <b>2011-9. ENHANCE FAMILY SELF-SUFFICIENCY PROGRAM</b>                      | <p><b>PLAN YEAR:</b> 2011</p> <p><b>RE-PROPOSED:</b> N/A</p> <p><b>DESCRIPTION</b><br/>In the event the head of household is unable to enroll in the FSS program (such as due to a disability), an adult household member may enroll in the program as the sole participant.</p> <p><b>REASON(S) CLOSED OUT</b><br/>Per HUD's recommendation, the initiative will be combined with the FSS Reinvention activity via a re-proposal in the Fiscal Year 2015 MTW Annual Plan.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p><b>IMPLEMENTATION DATE:</b> OCT 01, 2010</p> <p><b>DATE CLOSED OUT:</b> JUL 01, 2014</p> |
| <b>2011-5. DISREGARD RETIREMENT ACCOUNTS</b>                                | <p><b>PLAN YEAR:</b> 2011</p> <p><b>RE-PROPOSED:</b> N/A</p> <p><b>DESCRIPTION</b><br/>SDHC disregards retirement accounts when verifying an applicant or participant's assets.</p> <p><b>REASON(S) CLOSED OUT</b><br/>The re-proposal of activity 2010-6 wherein assets are eliminated from the rent calculation eliminates the need for the activity.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <p><b>IMPLEMENTATION DATE:</b> AUG 01, 2010</p> <p><b>DATE CLOSED OUT:</b> JUN 30, 2015</p> |
| <b>2010-10. UNDERTAKE PUBLIC HOUSING DEVELOPMENT</b>                        | <p><b>PLAN YEAR:</b> 2010</p> <p><b>RE-PROPOSED:</b> N/A</p> <p><b>DESCRIPTION/UPDATE</b><br/>Acquire, rehabilitate, or produce housing units as public housing.</p> <p><b>REASON(S) CLOSED OUT</b><br/>This activity was closed out in the Fiscal Year 2011 MTW Report. Public Housing development will occur under the Fiscal Year 2011 Public Housing Development initiative which combines the authorizations and flexibilities.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <p><b>IMPLEMENTATION DATE:</b> JUL 01, 2010</p> <p><b>DATE CLOSED OUT:</b> JUN 30, 2011</p> |
| <b>2010-3. TRIENNIAL REEXAMINATIONS FOR ELDERLY AND DISABLED HOUSEHOLDS</b> | <p><b>PLAN YEAR:</b> 2010</p> <p><b>RE-PROPOSED:</b> N/A</p> <p><b>DESCRIPTION/UPDATE</b><br/>Allows families defined as Elderly/Disabled to participate in a Triennial Reexamination Cycle. COLA updates to social security and veteran's benefits are processed in the "off" years. The activity was implemented using the authority to redefine the cycle utilized for the full reexamination of income and household composition.</p> <p><b>REASON(S) CLOSED OUT</b><br/>SDHC closed out the activity to streamline the reexamination process for Path to Success participants and rental assistance staff. Multiple reexamination processes for households proved difficult to administer when population changes occurred between Work-Able and Elderly/Disabled households. Path to Success households are placed on a biennial reexamination process effective with July 2015 reexamination. The PBV and FUP programs remain on an annual reexamination cycle.</p> | <p><b>IMPLEMENTATION DATE:</b> OCT 01, 2009</p> <p><b>DATE CLOSED OUT:</b> JUL 01, 2015</p> |



|                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                  |
|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <b>2009-1.</b><br><b>ACHIEVEMENT</b><br><b>ACADEMY OF THE</b><br><b>SAN DIEGO</b><br><b>HOUSING</b><br><b>COMMISSION</b> | <b>PLAN YEAR:</b> 2009<br><b>RE-PROPOSED:</b> N/A<br><b>DESCRIPTION/UPDATE</b><br>The SDHC Achievement Academy, formerly known as the Economic Development Academy, offers a broad range of one-on-one services and workshops geared toward workforce preparation, financial literacy, and homeownership education.<br><b>REASON(S) CLOSED OUT</b><br>The activity is a Section 8 activity not requiring regulatory waivers or broader uses of funds authority. The activity is ongoing but reported as a single fund flexibility activity in Section 5 of the Plan | <b>IMPLEMENTATION DATE:</b> OCT 01, 2010<br><b>DATE CLOSED OUT:</b> JUN 30, 2011 |
|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|



## SECTION V – SOURCES AND USES OF MTW FUNDS

### ESTIMATED SOURCES AND USES OF MTW FUNDS

#### I. ESTIMATED SOURCES OF MTW FUNDS

The MTW PHA shall provide the estimated sources and amount of MTW funding by Financial Data Schedule (FDS) line item.

| SOURCES                               |                                        |               |
|---------------------------------------|----------------------------------------|---------------|
| FDS LINE ITEM                         | FDS LINE ITEM NAME                     | DOLLAR AMOUNT |
| 70500 (70300+70400)                   | TOTAL TENANT REVENUE                   | \$0           |
| 70600                                 | HUD PHA OPERATING GRANTS               | \$305,002,200 |
| 70610                                 | CAPITAL GRANTS                         | \$0           |
| 70700 (70710+70720+70730+70740+70750) | TOTAL FEE REVENUE                      | \$0           |
| 71100+72000                           | INTEREST INCOME                        | \$0           |
| 71600                                 | GAIN OR LOSS ON SALE OF CAPITAL ASSETS | \$0           |
| 71200+71300+71310+71400+71500         | OTHER INCOME                           | \$19,927,858  |
| 70000                                 | TOTAL REVENUE                          | \$324,930,058 |

#### II. ESTIMATED USES OF MTW FUNDS

The MTW PHA shall provide the estimated uses and amount of MTW funding by Financial Data Schedule (FDS) line item.

| SOURCES                                                 |                                                  |               |
|---------------------------------------------------------|--------------------------------------------------|---------------|
| FDS LINE ITEM                                           | FDS LINE ITEM                                    | DOLLAR AMOUNT |
| 91000 (91100+91200+91400+91500+91600+91700+91800+91900) | TOTAL OPERATING - ADMINISTRATIVE                 | \$15,592,282  |
| 91300+91310+92000                                       | MANAGEMENT FEE EXPENSE                           | \$0           |
| 91810                                                   | ALLOCATED OVERHEAD                               | \$11,206,139  |
| 92500 (92100+92200+92300+92400)                         | TOTAL TENANT SERVICES                            | \$1,113,999   |
| 93000 (93100+93600+93200+93300+93400+93800)             | TOTAL UTILITIES                                  | \$0           |
| 93500+93700                                             | LABOR                                            | \$0           |
| 94000 (94100+94200+94300+94500)                         | TOTAL ORDINARY MAINTENANCE                       | \$1,056       |
| 95000 (95100+95200+95300+95500)                         | TOTAL PROTECTIVE SERVICES                        | \$10,032      |
| 96100 (96110+96120+96130+96140)                         | TOTAL INSURANCE PREMIUMS                         | \$268,587     |
| 96000 (96200+96210+96300+96400+96500+96600+96800)       | TOTAL OTHER GENERAL EXPENSES                     | \$2,090,108   |
| 96700 (96710+96720+96730)                               | TOTAL INTEREST EXPENSE AND AMORTIZATION COST     | \$0           |
| 97100+97200                                             | TOTAL EXTRAORDINARY MAINTENANCE                  | \$0           |
| 97300+97350                                             | HOUSING ASSISTANCE PAYMENTS + HAP PORTABILITY-IN | \$294,647,855 |
| 97400                                                   | DEPRECIATION EXPENSE                             | \$0           |
| 97500+97600+97700+97800                                 | ALL OTHER EXPENSES                               | \$0           |
| 90000                                                   | TOTAL EXPENSES                                   | \$324,930,058 |

Please describe any variance between Estimated Total Revenue and Estimated Total Expenses:

N/A

#### III. DESCRIPTION OF PLANNED USE OF MTW SINGLE FUND FLEXIBILITY

SDHC utilizes single-fund flexibility to fund the Achievement Academy and to provide funding for services in support of the Community Action Plan on Homelessness and the SDHC Housing Intervention Continua. The Achievement Academy is a learning and skills center available to families participating in the Housing Choice Voucher and Public Housing programs. Programs offered at the Achievement Academy are geared to workforce readiness and financial literacy. The Family Self-Sufficiency program is another component of the Achievement Academy. Please note: Individual Development Accounts are no longer funded with MTW single-fund flexibility. Please see the following pages for a thorough discussion of each activity.



### SINGLE FUND FLEXIBILITY NARRATIVE

#### ENVISION CENTER DEMONSTRATION PROGRAM

In June of 2018, HUD announced the designation of EnVision Centers in 17 communities across the nation. SDHC was selected for the only location in California, and only one of three co-located within a designated Promise Zone.

Initially implemented with two locations to provide client flexibility, the Southeast San Diego location closed due to the pandemic. The location housed at the SDHC's Achievement Academy is temporarily closed to in-person traffic while staff continues to work remotely. Services, however, continue to be offered online. EnVision Centers are open to any households currently receiving SDHC's rental assistance and also those on the waitlist. Other clients served include residents of the Promise Zone.

EnVision Centers leverage public and private resources to help clients achieve goals to secure economic security. To foster long-lasting self-sufficiency, EnVision Centers provide support in the following four areas of focus: Economic Empowerment; Education; Health/Wellness; and Character/Leadership

#### FAMILY SELF-SUFFICIENCY: EDEN HOUSING INC.

In November 2020, the SDHC Achievement Academy signed a contract with Eden Housing, Inc., a California nonprofit public benefit corporation, to implement a Family Self-Sufficiency (FSS) program at two of its San Diego properties. This marks the first time HUD has authorized a public housing authority to run an FSS program for a private multifamily developer. The FSS program will operate under HUD's guidelines for the traditional five-year program and not the Achievement Academy's MTW approved two-year program.

#### ACHIEVEMENT ACADEMY

SDHC uses single-fund flexibility in support of MTW activities to enhance self-sufficiency programming. SDHC combines funds from public housing operating and capital fund assistance (authorized by section 9 of the United States Housing Act of 1937 [the Act]) and voucher funds (authorized by section 8 (o) of the Act) to implement a single-fund budget approach to budgeting and accounting. SDHC has consolidated public housing and HCV program funds to implement the approved Moving to Work initiatives described in previously approved MTW Plans and will continue to do so in future Plans.

SDHC uses single-fund flexibility to conduct a variety of activities geared toward self-sufficiency. The Achievement Academy offers a broad range of one-on-one services and workshops geared toward workforce readiness and financial literacy. Partnerships with a variety of external organizations specializing in their fields enable SDHC to provide assistance to participants with different interests, career focuses, and skill levels. Leveraging funding from outside sources increases the services provided to participants. When possible, staff looks for grants that provide funding and coaching to assist both staff and participants. Following the Financial Opportunity Center (FOC) model, created by funding from the Local Initiatives Support Corporation (LISC), the Achievement Academy is able to provide robust services to participants that go beyond job leads and help support self-sufficiency. The resources offered at the Achievement Academy are a vital component of the Path to Success rent reform activity as participants are incentivized to increase income and work towards self-sufficiency. SDHC plans to continue and grow these partnerships to better serve our families and increase economic self-reliance. The narrative below describes some of the services offered at the Achievement Academy.

It is worth noting that while the COVID-19 pandemic temporarily disrupted and altered the Achievement Academy's service delivery model, it did not prevent services from reaching clients in new and creative ways. Like most businesses across the country and elsewhere, SDHC Achievement Academy staff quickly reworked in-person meetings and workshops to Zoom or other online platforms. The change in service delivery proved to be more accessible and convenient for many clients resulting in increased participation in workshops and programmatic events.

#### EMPLOYMENT/WORKFORCE DEVELOPMENT

##### Job Developer

One of the Achievement Academy Workforce Readiness Specialist (WRS) positions serves as a job developer and makes connections with employers of in-demand occupations; organizes job fairs; and coordinates employment services with partner organizations. Training for participants covers such topics as on-line job search, résumé writing, interviewing tips, and customer service. The Achievement Academy also partners with Manpower, an industry leader in employment services. Manpower helps to leverage connections in the business community to help open doors to companies that typically have been a struggle for participants to get into in the past.





### **One-Stop Career Center**

The San Diego Workforce Partnership (SDWP) provides services via a satellite One-Stop Career Center at the local downtown public library. SDWP staff offers workforce development services including labor market information, career development, assessment, job search/retention skills, job placement assistance, and referrals to training opportunities.

### **Small Business Development Training**

The SDHC Achievement Academy provides a small business training program directly for SDHC clients and partners with Access to support entrepreneurs who want to start or expand a small business. Microenterprise services and training offered to clients include creating, or expanding, a business plan; obtaining a business license; one-on-one business counseling; market training & research; and financial literacy support among other services.

### **Employment/Workforce Development Workshops**

The SDHC Achievement Academy offers employment readiness workshops and provides access to temporary and permanent employment through employer connections. Workshops include: Returning to the Workforce; The Job Search Rollercoaster; Teamwork Skills Everyone Needs; and 10 Keys for Professional Success among others. The Achievement Academy also hosts recruitment fairs via Zoom. Participants are invited to presentations from hiring organizations and hear directly from human resources representatives how to get hired at their company. Topics covered range from the job application and résumé submittal process to interview preparedness and communication skills. Many of the participating recruitment organizations guarantee, at minimum, an interview to SDHC clients.

### **Youth Programs**

Staff at the Achievement Academy strives to offer innovative programing in an effort to keep participants interested and engaged, including a drone training program and medical assistant program. One WRS position focuses on developing programming for “opportunity youth”, defined as young adults between sixteen and twenty-four years of age who are not working and not enrolled in school. Students receive education counseling or career guidance. The Achievement Academy has partnered with Access, Inc. to provide additional training and services to these young adults.

### **Youth Healthcare Program**

The San Diego Housing Commission, through a grant from The Conrad Prebys Foundation, began implementation of a youth healthcare program that will train 40 young adults, 18-26, from households with low income. Called the Healthcare Career Catalyst for Young Adults Program, this opportunity will provide Certified Medical Assistant (CMA) training plus life skills support at no cost to participants. Participants will receive a monthly stipend during the course of the six-month program as well as guidance and education from a certified financial counselor.

### **Academy Computer Lab**

The SDHC Achievement Academy computer lab is currently closed to in-person activity as staff continues to work remotely. During the early shutdown of the pandemic SDHC partnered with Computers2Kids to provide laptops to assist with digital access to SDHC families. This partnership, made possible with a grant from the Local Initiatives Support Corporation (LISC), allows families to participate in on-line school and job search activities. Currently, families are referred to local libraries where free Wi-Fi devices and equipment may be checked out.

## **INCOME SUPPORTS**

### **Benefits Screening**

SDHC Achievement Academy staff work with clients on benefits screening. Application assistance is currently offered for an array of program such as CalWorks, Women Infants and Children (WIC), California Healthy Families, Child Care Assistance, MediCal, and Supplemental Nutrition Assistance Program (SNAP). Additionally, clients are referred to Dreams for Change for tax assistance programs.

## **FINANCIAL EDUCATION**

### **Financial Coaching**

The Achievement Academy has been able to have several WRS positions trained as certified Financial Counselors. The Financial Counselors offer credit counseling in debt reduction, credit repair, budgeting, and cash management skills. These services have been incorporated into the FOC service delivery model utilized within the Achievement Academy.

### **Financial Skills Education Workshops**

Financial Education workshops are routinely offered in the following topic areas: Debt and credit repair; credit score improvement; controlling expenses; maintaining a financial fitness plan; electronic banking and direct employee deposits; budget management, ordering, reviewing, and repairing credit report; investments strategies and options; and pensions/retirement planning.



### Financial Coaching Training

SDHC WRS staff utilize the LISC Financial Counseling Model to implement innovative coaching methods during one-on-one appointments with participants. SDHC is also positioned to assist participants with improving credit through a partnership with Credit Builders Alliance. The ability to internally pull credit reports allows SDHC to further assist participants with accessing current credit ratings in order to begin aligning client goals for credit improvement to future financial and career goals.

The chart below contains a summary of the results of Achievement Academy activities at the close of Fiscal Year 2024.

| METRIC                                                                                                                            | OUTCOME |
|-----------------------------------------------------------------------------------------------------------------------------------|---------|
| Number of rental assistance participants receiving core services                                                                  | 1,257   |
| Number of rental assistance participants with an increase in earnings                                                             | 255     |
| Number of rental assistance participants placed in employment                                                                     | 231     |
| Number of rental assistance participants employed for 12 or more consecutive months                                               | 43      |
| Number of rental assistance participants who attended a work readiness workshop                                                   | 1269    |
| Percent of rental assistance participants who attended a recruitment and resource fair and obtained employment as a direct result | 19%     |
| Number of rental assistance participants who completed vocational or bridge training                                              | 2       |

### FLEXIBLE FUNDING FOR SUPPORTIVE SERVICES

In addition to the Achievement Academy, SDHC utilizes MTW funds to provide supportive services that would align with the City of San Diego's Community Action Plan on Homelessness. The Community Action Plan on Homelessness identified a homeless-crisis-response-system service gap. Households can often present in significant crisis, and in the early stage of the crisis presentation it can be challenging to determine whether the homelessness/housing crisis is due to situational or structural factors/barriers in the household/individual. Flexible funding used towards supportive services, in this instance, help fund a central point of contact and centralized resources for households as they move between the various programs available.

Examples of supportive services that SDHC seeks to provide via flexible funding include, but are not limited to:

- Centralized Case Management
- Mental Health Services
- Physical Healthcare Services
- Behavioral Healthcare
- Substance Use Services
- Life Skills Training
- Education Services
- Employment Assistance
- HIV Services

This flexible supportive services approach creates individualized emergency intervention and housing planning for the household/individual to best meet the participant's needs with a focus on aligning the right level of intervention with the critical need, promoting self-sufficiency and identifying the best resource to help participants thrive and overcome both situational and structural barriers to long-term housing stability.



For example, SDHC has drafted a Housing Intervention Continua, which delves into how at-risk populations can be served via centralized resources if funded via this proposed activity. The Continua contains multiple approved local non-traditional MTW activities, in which case management is operated separately. Currently, if a household moves from one program to another, this could necessitate a change in who their point of contact is. This continua could utilize flexible funding to focus on using centralized case management in order to help households more successfully navigate available programs, which includes Homeless Shelter Beds, Prevention and Diversion Programs, Moving Home, Sponsor-Based Subsidies, as well as the Achievement Academy and other approved programs. In this instance, centralized case management would remain with participating household from the beginning and continue with them in order to direct which program is most appropriate for their situation. Flexible funding would ensure that even if the household move into another housing program, their case management point of contact would remain with them until exit.

While funding for supportive services within the aforementioned Homeless Housing Continua could be an immediate use of the activity, it is expected that flexible funding for supportive services could also be used towards other households and programs eligible for assistance from SDHC, including households enrolled in homelessness services programs funded by SDHC. In addition, funding may be utilized to support administrative staff whose main job duties are to develop, monitor, or support efforts that align with this initiative and SDHC's commitment to further progress towards goals of the Community Action Plan on Homelessness for the City of San Diego. Another potential application SDHC recently encountered occurred during an acquisition using CARES Act funding. While funding was available for the acquisition, the supportive services that were needed were not included. This, if approved, could be used to bridge similar gaps encountered in the acquisition and development process based on other funding sources used.

Another example could be providing assistance to households in obtaining broadband access that is increasingly necessary for education and remote work opportunities, this could include flexible funding for tenant-based households or the use of funds to provide high speed internet access at SDHC-owned and/or controlled properties. As a result of the COVID-19 pandemic, in the City of San Diego, there has been an expansion of remote learning opportunities that may persist for educational outreach after a return to in person classes. Remote learning and conferencing often requires video capabilities, which means that broadband access is required. Not all households have access to this resource, and flexible funding could help provide for households in need in order to prevent a long-term disadvantage. In addition, families with children that would have access would also help their parents or guardians in additional access to job search resources, as well as provide them the ability to work possibly work remotely.

Flexible funding would help to fund case management staff and financial assistance to stabilize a household's immediate housing crisis. Coupled with financial assistance to address immediate needs, case management helps to minimize the negative impact of unstable housing for individuals and families who are at risk of or actively experiencing homelessness. Prevention and Diversion assistance is individualized to each household's unique needs and stabilization activities may include:

- Short-term, light-touch case management
- Housing search assistance
- Financial literacy resources
- Workforce readiness resources
- Landlord/roommate conflict mediation
- Connection to services and/or public assistance benefits

### PREVENTION/DIVERSION

SDHC will utilize MTW flexible funds to provide services that reduce the inflow into the current homelessness system through prevention and diversion. Prevention and Diversion services strive to prevent homelessness before it occurs as well as to divert individuals who are experiencing homelessness to other housing opportunities outside of the region's homeless crisis response system. Prevention and Diversion is aligned with the Housing First model of addressing homelessness, an approach



to successfully connect households at risk of or experiencing homelessness to services, programs, and housing options without preconditions and barriers to entry. Preventing or shortening an episode of homelessness for individuals and families greatly reduces the likelihood of another occurrence of housing instability or progression to chronic homelessness. Further, these efforts also help minimize the impact for overburdened shelter systems in San Diego. In addition to supportive services through case management, Prevention and Diversion utilizes financial assistance in the form of rent, rent arrears, utility payments, security deposits and application fees to stabilize housing for individuals and families facing a housing crisis. Depending on the nature of the housing crisis being addressed through our Prevention and Diversion programs, SDHC may choose to use habitability checks in lieu of HQS inspections.

### **LANDLORD ENGAGEMENT AND ASSISTANCE PROGRAM (LEAP)**

SDHC will utilize MTW flexible funds to the Landlord Engagement and Assistance Program or LEAP, which aims to increase access to the existing market of available units for individuals and families experiencing homelessness. LEAP is aligned with the Housing First model of addressing homelessness, an approach to successfully connect households experiencing homelessness to services, programs, and housing options without preconditions and barriers to entry. Depending on the nature of the housing crisis being addressed, SDHC may choose to use habitability checks in lieu of HQS inspections.

LEAP works directly with landlords and property management companies within the City of San Diego to help move individuals and families into housing quickly. LEAP offers incentives to landlords as well as the Landlord Contingency Fund and landlord liaison services. Flexible funding used towards LEAP services would help to fund a SDHC staff landlord liaison, support to individuals and families to identify housing units and financial assistance for them to pay move-in costs like security deposits including holding fees, application fees, utility assistance, rent arrears and vacancy loss.

## SECTION V – SOURCES AND USES OF MTW FUNDS



### IV. PLANNED APPLICATION OF PHA UNSPENT OPERATING FUND AND HCV FUNDING

| ORIGINAL FUNDING SOURCE | BEGINNING OF FY – UNSPENT BALANCES | PLANNED APPLICATION OF PHA UNSPENT FUNDS DURING FY |
|-------------------------|------------------------------------|----------------------------------------------------|
| HCV HAP*                | \$25,031,976                       | \$25,031,976                                       |
| HCV Admin Fee           | \$0                                | \$0                                                |
| PH Operating Subsidy    | \$1,719,394                        | \$1,719,394                                        |
| <b>TOTAL:</b>           | <b>\$26,751,370</b>                | <b>\$26,751,370</b>                                |

#### Description of Planned Expenditures of Unspent Operating Fund and HCV Funding:

SDHC anticipates HCV HAP unspent balance will be used to cover increased voucher cost due to utilization rate being greater than 100%; to cover program administration cost; to fund local non-traditional including homelessness programs costs.

For Public Housing unspent balance, \$1,475,856 out of \$1,719,394 is operating/replacement reserve related to SDHC regulatory agreement with the Dept. of Housing and Community Development, a public agency of the State of California, for public housing projects CA063000009 and CA063000010.

\* Unspent HAP funding should not include amounts recognized as Special Purpose Voucher reserves

\*\*HUD's approval of the MTW Plan does not extend to a PHA's planned usage of unspent funds amount entered as an agency's operating reserve. Such recording is to ensure agencies are actively monitoring unspent funding levels and usage(s) to ensure successful outcomes as per the short- and long-term goals detailed in the Plan

### LOCAL ASSET MANAGEMENT PLAN

Did the MTW PHA allocate costs within statute in the Plan Year?

Yes

Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?

No

Did the MTW PHA provide a LAMP in the appendix?

No

If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.

N/A

### RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION

#### DESCRIPTION OF RAD PARTICIPATION

The MTW PHA shall provide a brief description of its participation in RAD. This description must include the proposed and/or planned number of units to be converted under RAD, under which component the conversion(s) will occur, and approximate timing of major milestones. The MTW PHA should also give the planned/actual submission dates of all RAD Significant Amendments. Dates of any approved RAD Significant Amendments should also be provided.

#### Rental Assistance Demonstration (RAD) Participation Description:

N/A

Has the MTW PHA submitted a RAD Significant Amendment in the appendix? A RAD Significant Amendment should only be included if it is a new or amended version that requires HUD approval.

N/A

If the MTW PHA has provided RAD Significant Amendment in the appendix, please state whether it is the first RAD Significant Amendment submitted or describe any proposed changes from the prior RAD Significant Amendment?

N/A



## **SECTION VI - ADMINISTRATIVE**

### **A. BOARD RESOLUTION AND CERTIFICATIONS OF COMPLIANCE**

See Appendix A

### **B. DOCUMENTATION AND PUBLIC PROCESS**

See Appendix B

### **C. PLANNED OR ONGOING EVALUATIONS**

There are no planned or ongoing evaluations

### **D. LOBBYING DISCLOSURES**

See Appendix C



## **APPENDIX A: BOARD RESOLUTION AND CERTIFICATIONS OF COMPLIANCE**

### **BOARD RESOLUTION**

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### **BOARD RESOLUTION**

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|                         |
|-------------------------|
| <b>BOARD RESOLUTION</b> |
| <b>PAGE 3 OF 4</b>      |

|                         |
|-------------------------|
| <b>BOARD RESOLUTION</b> |
| <b>PAGE 4 OF 4</b>      |





## CERTIFICATIONS OF COMPLIANCE

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## CERTIFICATIONS OF COMPLIANCE

**U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT****OFFICE OF PUBLIC AND INDIAN HOUSING****Certifications of Compliance with Regulations:****Board Resolution to Accompany the Annual Moving to Work Plan**

Acting on behalf of the Board of Commissioners of the Moving to Work Public Housing Agency (MTW PHA) listed below, as its Chair or other authorized MTW PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the MTW PHA Plan Year beginning (07/01/2025), hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

- (1) The MTW PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the MTW PHA conducted a public hearing to discuss the Plan and invited public comment.
- (2) The MTW PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan.
- (3) The MTW PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1 (or successor form as required by HUD).
- (4) The MTW PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964 (42 USC 2000d-1), the Fair Housing Act (42 USC 3601 et seq.), section 504 of the Rehabilitation Act of 1973 (29 USC 794), title II of the Americans with Disabilities Act of 1990 (42 USC 12131 et seq.), the Violence Against Women Act (34 USC 12291 et seq.), all regulations implementing these authorities; and other applicable Federal, State, and local fair housing and civil rights laws.
- (5) The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
- (6) The Plan contains a signed certification by the appropriate State or local official (form HUD-50077-SL) that the Plan is consistent with the applicable Consolidated Plan, which includes any applicable fair housing goals or strategies, for the PHA's jurisdiction and a description of the way the PHA Plan is consistent with the applicable Consolidated Plan (24 CFR §§ 91.2, 91.225, 91.325, and 91.425).
- (7) The MTW PHA will affirmatively further fair housing in compliance with the Fair Housing Act, 24 CFR 5.150 et. seq, 24 CFR 903.7(o), and 24 CFR 903.15, which means that it will take meaningful actions, in addition to combating discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Specifically, affirmatively furthering fair housing requires meaningful actions that, taken together, address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially or ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws (24 CFR 5.151). The MTW PHA certifies that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing.
- (8) The MTW PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975 and HUD's implementing regulations at 24 C.F.R. Part 146.
- (9) In accordance with the Fair Housing Act and Act's prohibition on sex discrimination, which includes sexual orientation and gender identity, and 24 CFR 5.105(a)(2), HUD's Equal Access Rule, the MTW PHA will not base a determination of eligibility for housing based on actual or perceived sexual orientation, gender identity, or marital status and will not otherwise discriminate because of sex (including sexual orientation and gender identity), will make no inquiries concerning the gender identification or sexual orientation of an applicant for or occupant of HUD-assisted housing
- (10) The MTW PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
- (11) The MTW PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 75.



## CERTIFICATIONS OF COMPLIANCE

PAGE 2 OF 2

- (12) The MTW PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
- (13) The MTW PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment, 31 U.S.C. § 1352.
- (14) The MTW PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
- (15) The MTW PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
- (16) The MTW PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the MTW PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.
- (17) With respect to public housing and applicable local, non-traditional development the MTW PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
- (18) The MTW PHA will keep records in accordance with 2 CFR 200.334 and facilitate an effective audit to determine compliance with program requirements.
- (19) The MTW PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
- (20) The MTW PHA will comply with the policies, guidelines, and requirements of 2 CFR Part 225 (Cost Principles for State, Local and Indian Tribal Governments) and 2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards), as applicable.
- (21) The MTW PHA must fulfill its responsibilities to comply with and ensure enforcement of Housing Quality Standards, as defined in 24 CFR Part 982 or as approved by HUD, for any Housing Choice Voucher units under administration.
- (22) The MTW PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
- (23) All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the MTW PHA in its Plan and will continue to be made available at least at the primary business office of the MTW PHA and should be made available electronically, upon request.

San Diego Housing Commission

CA 063

**MTW PHA NAME****MTW PHA NUMBER/PHA CODE**

*I/We, the undersigned, certify under penalty of perjury that the information provided above is true and correct. WARNING: Anyone who knowingly submits a false claim or makes a false statement is subject to criminal and/or civil penalties, including confinement for up to 5 years, fines, and civil and administrative penalties. (18 U.S.C. §§ 287, 1001, 1010, 1012; 31 U.S.C. §3729, 3802).*

Lisa Jones

President and CEO

**NAME OF AUTHORIZED OFFICIAL****TITLE**

Signed by:



3/17/2025

**SIGNATURE****DATE**

\* *Must be signed by either the Chair or Secretary of the Board of the MTW PHA's legislative body. This certification cannot be signed by an employee unless authorized by the MTW PHA Board to do so. If this document is not signed by the Chair or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.*



## APPENDIX B: DOCUMENTATION OF PUBLIC PROCESS

### DOCUMENTATION OF PUBLIC PROCESS

#### PUBLIC NOTICE



PUBLIC NOTICE

PUBLIC NOTICE



## APPENDIX C: LOBBYING DISCLOSURES





## APPENDIX D: NON-MTW RELATED SDHC INFORMATION

### PACKAGE OF HOMELESSNESS INITIATIVES

The SDHC Board of Commissioners on November 22, 2024, authorized agreements with shelter service providers to add 263 homelessness shelter beds to the City of San Diego's homelessness response system. The City of San Diego is funding these new shelter beds.

These shelter beds support the Short-Term Action Plan that the San Diego City Council requested from the City's Homelessness Strategies and Solutions Department (HSSD) and SDHC to address the anticipated loss of shelter beds at existing programs by December 31, 2024. The City Council confirmed its support for the plan on October 1, 2024.

SDHC will administer the contracts with Veterans Village of San Diego (VVSD), San Diego Rescue Mission, and TURN Behavioral Health Services. Additional beds will be operated at VVSD's campus through a previous contract with Father Joe's Villages, which SDHC also administers.

The new shelter beds are among a package of homelessness initiatives announced in October 2024. The initiatives are the result of the Short-Term Action Plan, which was informed by listening sessions with stakeholders, including people with experience living in homelessness.

In addition to these new shelter beds, the package of initiatives included a collaboration between SDHC and the Regional Task Force on Homelessness on a homelessness diversion initiative that launched November 1, 2024, to assist up to 150 individuals in the coming months, which will free up shelter beds to assist other experiencing homelessness. Diversion strategies employing flexible financial assistance, shared housing strategies and targeted case management can result in positive outcomes for shelter participants who are experiencing homelessness for the first time or who have existing support systems and the ability to end their homelessness without a long-term subsidy.



*New Homelessness Initiatives  
News Conference – October 28, 2024*

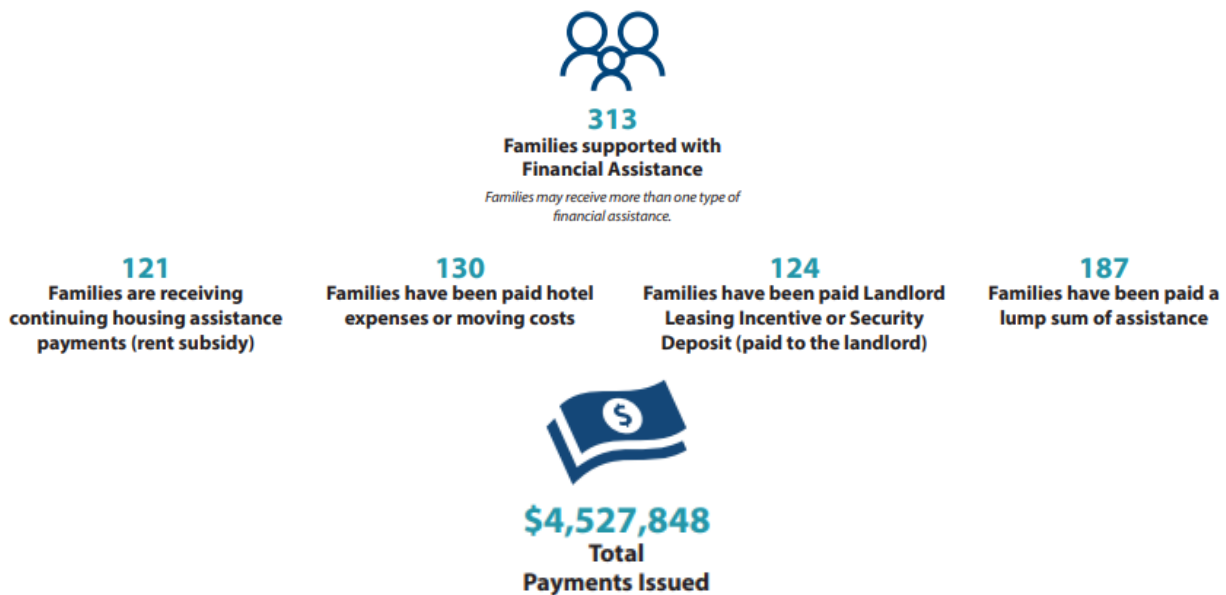
## APPENDIX D: NON-MTW RELATED SDHC INFORMATION



### FLOOD RECOVERY PROGRAM

As they have since catastrophic floods swept through San Diego communities in January 2024, SDHC staff continues to serve displaced families with compassion and professionalism. With funding from the County of San Diego and City of San Diego, SDHC's Flood Recovery Program for Displaced Residents offered assistance to 359 displaced families who were eligible for and enrolled in the County's Emergency Temporary Lodging Program as of May 23, 2024. As of November 13, 2024, SDHC has disbursed more than \$4.5 million in financial assistance for 313 eligible families, which represent 87 percent of all eligible families. Another 31 families chose not to apply for assistance, and 11 families either withdrew their applications or became unresponsive after they applied. Overall, more than 90 percent of eligible families have reported to SDHC that they obtained stable housing. This includes families SDHC assisted, families that withdrew their applications or became unresponsive, and families that did not apply but spoke to SDHC through outreach efforts. September 30 was the deadline for families to secure housing or choose a lump sum payment to be able to receive assistance from this program.

SDHC has determined that it has approximately \$900,000 in unused and uncommitted funds from the resources the City allocated for the Flood Recovery Program. In consultation with City Council offices that represent districts impacted by the January floods, SDHC has developed a plan for the use of these remaining funds. SDHC will be assisting families who applied for the Flood Recovery Program but were declined for assistance because they were not on the County's list of families who were eligible for and participating in the County's temporary lodging program as of May 23. SDHC will be able to provide lump sum direct financial assistance of up to \$5,500 each for families eligible for this new phase of SDHC's program. Details about SDHC's Flood Recovery Program and the assistance SDHC has provided are available on a dashboard report on [SDHC's website](#).



| Payment Type                 | Amount of Assistance |
|------------------------------|----------------------|
| Housing Assistance Payments  | \$1,172,484          |
| Lump Sum Assistance Payments | \$2,536,402          |
| Hotel Expenses               | \$420,823            |
| Moving Costs                 | \$63,204             |
| Landlord Leasing Incentives  | \$190,500            |
| Security Deposit             | \$144,435            |
| <b>TOTAL</b>                 | <b>\$4,527,848</b>   |

*Projected rental assistance obligations through March 2025: \$274,815*

## APPENDIX D: NON-MTW RELATED SDHC INFORMATION



### HEALTHCARE CAREER CATALYST FOR YOUNG ADULTS PROGRAM

The first group of 17 participants who completed the SDHC Achievement Academy's Healthcare Career Catalyst for Young Adults program celebrated their graduation on August 22, 2024.

This program provides Certified Medical Assistant training and life skills support at no cost to eligible young adults ages 18 through 26 with low income in the City of San Diego. It is a partnership between the SDHC Achievement Academy, Western Medical Training Center and the International Rescue Committee's Center for Economic Opportunity. A \$604,000 two-year grant from Prebys Foundation funds the program.

The program's goal is to train 80 young adults (20 young adults in each of four six-month program sessions over two years). The program builds upon an established SDHC Achievement Academy partnership with Western Medical Training Center that has graduated nearly 200 people as Certified Nursing Assistants.

Participants include young adults who have barriers to work and school as well as pressure beyond what is normal for their ages. Some participants also live in underserved communities and have traditionally faced barriers to financial self-reliance.

"I feel very accomplished," said Umi, a program graduate whose family receives rental assistance from SDHC. "I feel I'm actually prepared enough to go into the real world now and apply to jobs as a medical assistant, to go do externships and take everything that I've learned in the classroom from my instructors, from my peers, and actually use it in the real life to go make a difference somewhere. And I'm very excited."



*SDHC Achievement Academy's Healthcare Career Catalyst for Young Adults Program  
Graduation – August 22, 2024*

### FEDERAL FUNDING FOR SHELTER FOR TRANSITION-AGE YOUTH

With support from federal funding, the conversion of underutilized SDHC office space into a homelessness shelter for transition-age youth was completed in April, 2025.

Through a contract with SDHC, the San Diego Community Center currently operates the SAFE STAY shelter program, in partnership with San Diego Youth Services and the YMCA, with 22 beds at two interim sites. The conversion of SDHC's office space will provide a long-term home for the program with more than 40 shelter beds.





## APPENDIX D: NON-MTW RELATED SDHC INFORMATION

SDHC worked with U.S. Senator Alex Padilla and U.S. Rep. Scott Peters, who secured \$1.5 million in federal Community Projects Funding to support this conversion.



*Commencement of Office-Space Conversion into Shelter  
October 8, 2024*



## APPENDIX E: CURRENT ALTERNATIVE REASONABLE COST LIMITS

### SUPPORTING DOCUMENTATION: ACTIVITY #2021-1

| Project References                |          |       |              |               |          |           |           |              |
|-----------------------------------|----------|-------|--------------|---------------|----------|-----------|-----------|--------------|
| Property Name                     | Building | Type  | HCC (\$)     | TDC (\$)      | Gross SF | \$/SF HCC | \$/SF TDC | Board Report |
| <b>Elevator</b>                   |          |       |              |               |          |           |           |              |
| The Orchard                       | Elevator | New   | \$40,462,091 | \$50,340,415  | 145,047  | \$278.96  | \$347.06  | HCR20-078    |
| The Helm                          | Elevator | New   | \$21,271,000 | \$32,629,898  | 50,690   | \$419.63  | \$643.71  | HCR20-079    |
| Amanecer Apartments               | Elevator | New   | \$29,343,028 | \$48,525,857  | 128,260  | \$228.78  | \$378.34  | HCR20-089    |
| Ulric Street Apartments II        | Elevator | New   | \$16,809,596 | \$28,667,156  | 55,836   | \$301.05  | \$513.42  | HCR20-095    |
| The Post 310                      | Elevator | New   | \$16,574,525 | \$22,429,590  | 41,634   | \$398.10  | \$538.73  | HCR20-104    |
| Grant Heights / Winona Apartments | Elevator | Rehab | \$3,688,059  | \$16,021,358  | 28,422   | \$129.76  | \$563.70  | HCR21-008    |
| One Mississippi                   | Elevator | New   | \$14,000,250 | \$21,485,633  | 51,200   | \$273.44  | \$419.64  | HCR21-023    |
| Ventana al Sur                    | Elevator | New   | \$36,080,921 | \$48,024,994  | 70,411   | \$512.43  | \$682.07  | HCR21-050    |
| Nestor Senior Village             | Elevator | New   | \$16,175,301 | \$29,100,306  | 44,615   | \$362.55  | \$652.25  | HCR21-054    |
| Aquila Apartments                 | Elevator | New   | \$54,860,166 | \$75,536,993  | 172,840  | \$317.40  | \$437.03  | HCR21-085    |
| ShoreLINE Apartments              | Elevator | New   | \$47,556,291 | \$58,893,427  | 153,214  | \$310.39  | \$384.39  | HCR21-097    |
| Tizon                             | Elevator | Rehab | \$10,783,794 | \$46,132,343  | 84,420   | \$127.74  | \$546.46  | HCR21-102    |
| Aurora Apartments                 | Elevator | New   | \$15,249,683 | \$25,653,427  | 56,256   | \$271.08  | \$456.01  | HCR22-069    |
| Levant Senior Cottages            | Elevator | New   | \$34,036,513 | \$43,994,223  | 51,850   | \$656.44  | \$848.49  | HCR22-071    |
| The Iris                          | Elevator | New   | \$35,483,406 | \$50,273,210  | 115,424  | \$307.42  | \$435.55  | HCR22-086    |
| Navajo Family Apartments          | Elevator | New   | \$14,498,399 | \$23,150,701  | 49,877   | \$290.68  | \$464.16  | HCR22-089    |
| Messina Senior Apartments         | Elevator | New   | \$21,129,368 | \$35,384,460  | 62,005   | \$340.77  | \$570.67  | HCR22-090    |
| Harrington Heights                | Elevator | New   | \$84,152,295 | \$120,567,224 | 190,000  | \$442.91  | \$634.56  | HCR22-100    |
| Rancho Bernardo Transit Village   | Elevator | New   | \$56,534,311 | \$68,296,389  | 90,000   | \$628.16  | \$758.85  | HCR22-118    |
| Cerro Pueblo                      | Elevator | Rehab | \$4,600,000  | \$15,081,331  | 37,326   | \$123.24  | \$404.04  | HCR23-009    |
| Cortez Hill Apartments            | Elevator | New   | \$28,129,755 | \$38,706,921  | 54,711   | \$514.15  | \$707.48  | HCR23-017    |
| Mt Etna Family - Modica           | Elevator | New   | \$31,616,228 | \$52,196,213  | 87,773   | \$360.20  | \$594.67  | HCR23-036    |
| Cuatro at City Heights            | Elevator | New   | \$52,338,491 | \$78,037,266  | 132,958  | \$393.65  | \$586.93  | HCR23-045    |
| Hacienda Townhomes                | Elevator | Rehab | \$7,523,750  | \$21,555,118  | 52,000   | \$144.69  | \$414.52  | HCR23-046    |
| 8th Avenue Family Housing         | Elevator | New   | \$28,205,980 | \$36,580,632  | 78,292   | \$360.27  | \$467.23  | HCR23-058    |
| <b>Walkup</b>                     |          |       |              |               |          |           |           |              |
| Mission Terrace Apartments        | Walkup   | Rehab | \$4,424,505  | \$18,557,543  | 103,108  | \$42.91   | \$179.98  | HCR20-010    |
| Courthouse Commons                | Walkup   | New   | \$30,252,664 | \$39,450,771  | 91,237   | \$331.58  | \$432.40  | HCR20-051    |
| Iris Trolley Apartments           | Walkup   | New   | \$19,867,050 | \$30,540,100  | 41,818   | \$475.08  | \$730.31  | HCR22-084    |
| Serenade on 43rd                  | Walkup   | New   | \$17,836,941 | \$37,211,890  | 53,373   | \$334.19  | \$697.20  | HCR23-056    |
| Bandar Salaam Apartments          | Walkup   | Rehab | \$4,087,030  | \$18,612,475  | 56,976   | \$71.73   | \$326.67  | HCR23-059    |



## SUPPORTING DOCUMENTATION: ACTIVITY #2021-1

EFFECTIVE FY 2024

| AVERAGE TDC AND HCC |                            |                            |
|---------------------|----------------------------|----------------------------|
|                     | AVERAGE TDC PER<br>Sq. Ft. | AVERAGE HCC PER<br>Sq. Ft. |
| ELEVATOR            | \$538.00                   | \$339.76                   |
| WALKUP              | \$473.31                   | \$251.10                   |

### WALKUP COMPARISON

| HCC: 251.10<br>TDC: 473.31 |        | 0 BED<br>500 Sq. Ft. |         | 1 BED<br>700 Sq. Ft. |         | 2 BED<br>900 Sq. Ft. |         | 3 BED<br>1200 Sq. Ft. |         | 4 BED<br>1500 Sq. Ft. |         | 5 BED<br>1700 Sq. Ft. |         | 6 BED<br>1900 Sq. Ft. |         |
|----------------------------|--------|----------------------|---------|----------------------|---------|----------------------|---------|-----------------------|---------|-----------------------|---------|-----------------------|---------|-----------------------|---------|
|                            |        | HCC                  | TDC     | HCC                  | TDC     | HCC                  | TDC     | HCC                   | TDC     | HCC                   | TDC     | HCC                   | TDC     | HCC                   | TDC     |
| HUD                        | Walkup | 93,757               | 164,076 | 128,085              | 224,150 | 162,367              | 284,143 | 214,190               | 374,832 | 265,581               | 464,767 | 299,363               | 523,886 | 332,762               | 582,333 |
| SDHC                       | Walkup | 125,550              | 236,657 | 175,771              | 331,319 | 225,991              | 425,982 | 301,321               | 567,976 | 376,651               | 709,970 | 426,872               | 804,633 | 477,092               | 899,295 |

### ELEVATOR COMPARISON

| HCC: 339.76<br>TDC: 538.00 |          | 0 BED<br>500 Sq. Ft. |         | 1 BED<br>700 Sq. Ft. |         | 2 BED<br>900 Sq. Ft. |         | 3 BED<br>1200 Sq. Ft. |         | 4 BED<br>1500 Sq. Ft. |         | 5 BED<br>1700 Sq. Ft. |         | 6 BED<br>1900 Sq. Ft. |           |
|----------------------------|----------|----------------------|---------|----------------------|---------|----------------------|---------|-----------------------|---------|-----------------------|---------|-----------------------|---------|-----------------------|-----------|
|                            |          | HCC                  | TDC     | HCC                  | TDC     | HCC                  | TDC     | HCC                   | TDC     | HCC                   | TDC     | HCC                   | TDC     | HCC                   | TDC       |
| HUD                        | Elevator | 98,992               | 158,388 | 138,589              | 221,743 | 178,186              | 285,098 | 237,582               | 380,131 | 296,977               | 475,164 | 336,574               | 538,519 | 376,171               | 601,874   |
| SDHC                       | Elevator | 169,878              | 269,000 | 237,829              | 376,600 | 305,780              | 484,199 | 407,707               | 645,599 | 509,634               | 806,999 | 577,585               | 914,599 | 645,536               | 1,022,199 |

### TDC/HCC TABLE: ACTIVITY #2021-1

#### CURRENT SDHC REASONABLE COST LIMITS (UPDATED FY 2024 USING THE APPROVED MTW ACTIVITY METHODOLOGY)

|                        | 0 BED<br>500 Sq. Ft. |         | 1 BED<br>700 Sq. Ft. |         | 2 BED<br>900 Sq. Ft. |         | 3 BED<br>1200 Sq. Ft. |         | 4 BED<br>1500 Sq. Ft. |         | 5 BED<br>1700 Sq. Ft. |         | 6 BED<br>1900 Sq. Ft. |           |
|------------------------|----------------------|---------|----------------------|---------|----------------------|---------|-----------------------|---------|-----------------------|---------|-----------------------|---------|-----------------------|-----------|
|                        | HCC                  | TDC     | HCC                  | TDC     | HCC                  | TDC     | HCC                   | TDC     | HCC                   | TDC     | HCC                   | TDC     | HCC                   | TDC       |
| Detached/Semi-Detached | 122,040              | 213,569 | 158,101              | 276,677 | 188,761              | 330,331 | 224,728               | 393,275 | 264,334               | 462,584 | 289,744               | 507,052 | 314,230               | 549,903   |
| Row Homes              | 97,120               | 169,960 | 126,922              | 222,113 | 153,440              | 268,520 | 187,166               | 327,540 | 221,753               | 388,067 | 244,191               | 427,335 | 265,108               | 463,940   |
| Walkup                 | 125,550              | 236,657 | 175,771              | 331,319 | 225,991              | 425,982 | 301,321               | 567,976 | 376,651               | 709,970 | 426,872               | 804,633 | 477,092               | 899,295   |
| Elevator               | 169,878              | 269,000 | 237,829              | 376,600 | 305,780              | 484,199 | 407,707               | 645,599 | 509,634               | 806,999 | 577,585               | 914,599 | 645,536               | 1,022,199 |

## APPENDIX F: PATH TO SUCCESS HARDSHIP POLICY

### Path to Success Hardship Policies

#### **Purpose**

The primary objectives of the Path to Success activity updates are to continue the practice of periodically updating minimum family contribution amounts for Work-Able households to align with the local minimum wage, to adjust the calculation percentages for Work-Able households that pay more than the minimum family contribution and Elderly/Disabled households, and to address rising HAP expenses and funding uncertainties with a goal to prevent voucher terminations.

However, some households may experience a significant impact on their family contribution. To address this, the activity updates also include two hardship policies to mitigate the effects the updates may have on families.

The hardship policies establish the criteria and process for households to request a hardship exemption under the Path to Success activity. The objective is to provide temporary relief to households experiencing financial hardship due to minimum family contribution requirements, while maintaining the primary objectives of the activity.

#### **Path to Success Hardship**

##### **Eligibility Criteria**

- Work-Able 1 and Work-Able 2 households with at least one dependent who are subject to the minimum family contribution may apply for hardship.
- Households must demonstrate a shelter burden greater than 50% of their adjusted income to qualify.

##### **Hardship Family Contribution Determination**

- Hardship family contribution may be set to one of the following amounts, whichever is highest:
  - \$50,
  - The previous family contribution amount before the effective date of the implemented updates, or
  - 50% of the household's monthly adjusted income.
- If the hardship family contribution results in an amount that is higher than their current family contribution, the hardship will be denied due to no change in the family contribution.

##### **Hardship Family Contribution Duration**

- Approved households will receive a one-time, six-month hardship adjustment. After the hardship period, the family contribution will revert to the applicable minimum family contribution.

#### **Zero-Income Hardship**

##### **Eligibility Criteria**

- Work-Able household whose income decreases to zero through no fault of their own.

##### **Hardship Family Contribution**

- During the hardship period, the family contribution will be set to \$50.
- Approved households will receive a one-time, six-month hardship adjustment. After the hardship period, the family contribution will revert to the applicable minimum family contribution.

##### **Hardship Program Requirements**

- Households must sign a consent document agreeing to participate in required self-sufficiency activities. These may include attending work-readiness classes or workshops, applying for benefits, seeking or regaining employment, or other activities as determined by the program.
- Households will be referred to the SDHC Achievement Academy to work with a Work Readiness Specialist during the hardship period.

##### **Application and Review Process**

- Households must submit a hardship application.
- Households applying for the Zero-Income Hardship must submit documentation supporting their eligibility.



- The Path to Success Hardship Committee will review applications and notify households of approval or denial.
- Approved households will receive written notice of the hardship adjustment and program requirements.
- Decisions are final and not reviewable.
- The decision to terminate the hardship for non-compliance will be made on a case-by-case basis and will consider extenuating circumstances and the household's ongoing level of engagement. Decisions are final and not reviewable.

**Annual Reevaluation**

- The program will monitor hardship requests, family contributions, and other relevant data to identify unintended impacts.
- The hardship policy will be reevaluated annually and adjusted as needed.