AFFORDABLE HOUSING PLAN

 Project Address: [Enter here]



[insert your own project image above]

Table of Contents

[EXECUTIVE SUMMARY 3](#_Toc178766045)

[AFFORDABLE UNIT STANDARDS 4](#_Toc178766046)

[Project Description 4](#_Toc178766047)

[Unit Design 4](#_Toc178766048)

[Bedrooms and Bathrooms 4](#_Toc178766049)

[Unit Details 4](#_Toc178766050)

[Floor Plans 5](#_Toc178766051)

[Timing of Construction 5](#_Toc178766052)

[Affordability Duration 5](#_Toc178766053)

[AFFORDABLE MARKETING PLAN 6](#_Toc178766054)

[Marketing Plan Requirements 6](#_Toc178766055)

[Nondiscrimination Statement 6](#_Toc178766056)

[Advertising Methods 6](#_Toc178766057)

[Website 6](#_Toc178766058)

[Social Media 6](#_Toc178766059)

[Standard Media 6](#_Toc178766060)

[Project Site Signage 7](#_Toc178766061)

[Community Outreach – Direct Mailing and Noticing 7](#_Toc178766062)

[Record Keeping and Schedule 7](#_Toc178766063)

[TENANT SELECTION PLAN 8](#_Toc178766064)

[Income Eligibility Requirements 8](#_Toc178766065)

[Monthly Utility Allowances 8](#_Toc178766066)

[Tenant Selection Process 9](#_Toc178766067)

[Nondiscrimination Statement 9](#_Toc178766068)

[Eligible Candidates 9](#_Toc178766069)

[Application Procedures 9](#_Toc178766070)

[First-Come, First-Served Basis Process (if applicable) 9](#_Toc178766071)

[Lottery Process (if applicable) 10](#_Toc178766072)

[Possible Reasons for Denial 11](#_Toc178766073)

[Violence Against Women Act (VAWA) Protections 11](#_Toc178766074)

[Grievance Procedure 12](#_Toc178766075)

[Waitlist 12](#_Toc178766076)

[Annual Income Recertification 12](#_Toc178766077)

[Attachment A: Utility Allowance Schedules For Affordable UNITS 13](#_Toc178766078)

[Attachment B: Application for Affordable Housing UNIT 14](#_Toc178766079)

[Attachment C: RENTAL LEASE AGREEMENT 15](#_Toc178766080)

#  EXECUTIVE SUMMARY

The project [Project Address/Project Name] is a [multi-unit residential, Average Unit-size Density (AUD), mixed-use] development, and is located in the City of Santa Barbara at      . The development is proposed to commence construction in [month, year]. The project includes a total of       rental units, of which,       will be designated as      -Income housing units. The Affordable Units will be aimed at       percent Average Median Income (AMI) households. The      -Income Housing Units will be distributed evenly throughout the development and will be subject to a [Enter 55 for State, or 90 for City]-year rental restriction. The purpose of this Affordable Housing Plan is to establish fair and equitable guidelines for selecting candidates to occupy the      -Income Housing Units.

The landowner will accept applications for selection of tenants on a [first-come-first-served basis or will conduct a lottery]. The units are governed by a Housing Affordability Control Covenant which binds the unit to the identified affordability range for a period of [Enter 55 for State, or 90 for City] years. During this period all subsequent rentals must occur within the same renter affordability income and rental prices.

The property is owned by       and managed by      . Questions regarding the enclosed information may be obtained by contacting       at       (phone) and       (email).

Applications will be accepted online or at the Project Address from [time, day, month, year] to [time, day, month, year] .

#  AFFORDABLE UNIT STANDARDS

## Project Description

[Insert Project Description here]

## Unit Design

The Affordable Units are dispersed throughout the project and are comparable in construction quality and exterior design to the Market Rate Units. In addition, the size of the Affordable Units is comparable to the Market Rate Units, as follows: [describe unit sizes here]. The interior finishes and features may be different but will be durable, of good quality and consistent with contemporary standards for new housing.

|  |
| --- |
|  Floor Area Comparison |
|  |  **Range** | **Affordable Unit Average** | **Market Rate Average** |
| Studios ( [Insert #] )  |       –       sq ft |       sq. ft. ( [Insert #] )  |       sq. ft. |
| 1-bedrooms ( [Insert #] ) |       –       sq ft |       sq. ft. ( [Insert #] ) |       sq. ft. |
| 2-bedrooms ( [Insert #] ) |       –       sq ft |       sq. ft. ( [Insert #] )  |       sq. ft. |
| 3+ bedrooms ( [Insert #] ) |       –       sq ft |       sq. ft. ( [Insert #] )  |       sq. ft. |

### Bedrooms and Bathrooms

The project consists of       studio,       one-bedroom,       two- bedroom, and       three- bedroom units. The average number of bedrooms in the Affordable Units equals       bedrooms/unit while the average number of bedrooms for the project overall is       bedrooms/unit. Studios in both the Affordable Units and the Market Rate Units have       bathrooms. The      -bedroom Affordable Units and Market Rate Units each have       bathrooms.

### Unit Details [Enter Income Category]

Apartment #       is a       sq. ft. [insert # bedrooms] on the ground/upper floor and is located      . The Affordable Unit #       is larger/smaller than Market Rate Unit #       and [describe any floor plan similarities/differences here]. Example: The unit will be equipped with all appliances including stove, refrigerator, washer, dryer, and dishwasher. The kitchen, cabinetry, countertops, and flooring will be different but comparable to the Market Rate units. All associated utilities will be included in the established rental price with the exception of Wi-Fi which will be the responsibility of the renter.

Apartment #       is a       sq. ft. [insert # bedrooms] on the ground/upper floor and is located      . The Affordable Unit #       is larger/smaller than Market Rate Unit #       and [describe any floor plan similarities/differences here]. Example: The unit will be equipped with all appliances including stove, refrigerator, washer, dryer, and dishwasher. The kitchen, cabinetry, countertops, and flooring will be different but comparable to the Market Rate units. All associated utilities will be included in the established rental price with the exception of Wi-Fi which will be the responsibility of the renter.

Apartment #       is a       sq. ft. [insert # bedrooms] on the ground/upper floor and is located      . The Affordable Unit #       is larger/smaller than Market Rate Unit #       and [describe any floor plan similarities/differences here]. Example: The unit will be equipped with all appliances including stove, refrigerator, washer, dryer, and dishwasher. The kitchen, cabinetry, countertops, and flooring will be different but comparable to the Market Rate units. All associated utilities will be included in the established rental price with the exception of Wi-Fi which will be the responsibility of the renter.

### Floor Plans

|  |  |  |
| --- | --- | --- |
| Apartment #      Title | Apartment #      Title | Apartment #      Title |
| Three squares, one filled with horizontal lines | Three squares, one filled with horizontal lines | Three squares, one filled with horizontal lines |

[Insert your own floor plan pictures in table above]

## Timing of Construction

All Affordable Units will be constructed and occupied concurrently with the construction and occupancy of the Market Rate Units.

## Affordability Duration

[Insert #] Affordable Units will be legally restricted to occupancy by      -Income Households for 90 years per City policy and/or [Insert #] Affordable Units by      -Income Households for 55 years per State policy, pursuant to and in conformance with the City’s Affordable Housing Policies and Procedures.

#  AFFORDABLE MARKETING PLAN

The City of Santa Barbara has established procedures for Affordable Units to follow in order to affirmatively market Affordable Units constructed under the City’s Affordable Housing Program. The project [Project Address/Project Name] has constructed [Insert #] Affordable Rental Units under this program and therefore subject to the following marketing plan requirements.

## Marketing Plan Requirements

The purpose of this plan is to allow the project Developer/Owner to inform the general public and potential tenants about the availability of newly constructed Moderate Income Rental Units through project generated marketing. All costs associated with these requirements and their development and operating budget are the responsibility of the project Developer/Owner. This draft plan will be finalized prior to the issuance of the building permit and as part of the initiation of marketing the Market Rate units.

Nondiscrimination Statement

As stipulated by Federal, State and local Laws, the Affordable Units Marketing Plan will be implemented and candidates selected regardless of race, color, national origin, disability, sex (including gender identify and sexual orientation) HIV/AIDS status, and other protected characteristics.

### Advertising Methods

Broad community outreach to citywide and targeted audiences to ensure all groups are informed will be accomplished by the following methods and with the intended outreach time schedules, type of materials to be distributed.

### Website

A project website (     .com) will be created to highlight the property’s attributes. The website will also include a tab highlighting the Affordable Units, their locations, floor plans, the Tenant Selection Plan and process. A link to the application will also be included in both English and Spanish. Candidates may apply either online, by mailing their completed applications to       or hand delivering it to the project construction trailer. There will also be the ability for interested parties to sign up for e-mail notifications of project milestones. All other marketing methods will refer to the website.

### Social Media

In addition to the website, there may be an Instagram account (@     ) which will highlight project milestones and link back to the website.

### Standard Media

At least       days prior to occupancy, a display ad will be placed in the Santa Barbara Independent highlighting the project and identifying the Affordable Housing Rental Program. The bilingual ad will include a link back to the website. In addition, a press release will be sent out to local news agencies such the Santa Barbara News Press, NoozHawk, Edhat, news channel KEYT and KZSB radio.

### Project Site Signage

Signage located on the project site will refer to the website and provide information regarding the project.

### Community Outreach – Direct Mailing and Noticing

Developer/Owner will also create a community outreach that will notify public agencies (e.g., Housing Authority of the City of Santa Barbara, Housing Authority of the County of Santa Barbara) and local housing groups (e.g. Coastal Housing Coalition) of the availability of Affordable Units.

## Record Keeping and Schedule

As specified by the City of Santa Barbara Affordable Units Marketing Requirements, copies of all advertisements, flyers and letters sent to local housing authorities, groups and interested parties will be retrained by Developer/Owner for three years.

#  TENANT SELECTION PLAN

As outlined in this Tenant Selection Plan, Developer/Owner or a third party mutually acceptable to Developer/Owner and the City of Santa Barbara, will accept applications on a [Enter first-come first served basis or conduct a public lottery] for candidates which meet the program requirements based on their Application. At the [choose: time of application or lottery] all participants will be given a priority number or letter based on the draw and unit type they are applying for. Further information regarding the Tenant Selection Process can be found below.

## Income Eligibility Requirements

The area median income (AMI) for Santa Barbara County is adjusted annually by the U.S. Department of Housing and Urban Development (HUD) and State of California Department of Housing and Community Development and income limits and rental rates may be modified to reflect such changes.

The City of Santa Barbara adjusts the Santa Barbara County median income based on household size. As a result, the maximum income for households within the applicable income category to participate in this Affordable Unit(s) rental opportunity is outlined below.





For units under State Density Bonus, the maximum rents are as follows:



### Monthly Utility Allowances

The City’s maximum rents identified above assumes that all utilities are included in the rental price. Utilities will be the responsibility of [choose Tenant or Landlord]. Therefore, at the time of occupancy, the appropriate monthly rental prices will be reduced commensurate with typical monthly utility costs for each type of unit. Typical monthly utility allowances have been identified by the United States Department of Housing and Urban Development and are specified in Appendix A – “Utility Allowance Schedules for Affordable Units”, below. This allowance will be used to determine the rent reduction unless other measures which have been incorporated into the projects (e.g., solar energy) demonstrate a more appropriate site-specific monthly utility allowance.

## Tenant Selection Process

The following information is intended to initiate the process for inclusion in the Tenant Selection Process. Selection will be based on meeting the requirements of the application, [Enter "order of application acceptance" or "lottery selection number"], and the ability to provide any necessary information to determine eligibility as required by this Tenant Selection Plan.

### Nondiscrimination Statement

As stipulated by Federal, State and Local Laws, the Tenant Selection Plan shall be implemented and candidates selected regardless of race, color, national origin, disability, sex (including gender identify and sexual orientation) and other protected characteristics.

### Eligible Candidates

The City of Santa Barbara has determined the appropriate income limit and rental price for the Affordable Unit(s)s. These figures are based on the current AMI for Santa Barbara County and adjusted annually by the City to reflect the different unit and household sizes.

### Application Procedures

Candidates that wish to be considered for the Affordable Units will be encouraged to access the project’s website to access project information and obtain an application. Upon receipt, information contained on the application will be verified for accuracy and screened for qualification in accordance with the United States Department of Housing and Community Development CFR 5.609. On the application form, candidates will be required to identify household size and the number of bedrooms in the unit they are applying for. Once an application is accepted, it will be [Enter "date/time stamped" or "assigned a lottery number"]. All candidates who submit an application on a first-come, first-served basis will be personally notified at time of application as to their number.

### First-Come, First-Served Basis Process (if applicable)

No less than 60 days prior to occupancy of the Affordable Units, the property manager will contact the applicants in number order for priority, beginning with number one, on the list established by the Date/Time order the applications were accepted. Each candidate will only be eligible for a unit appropriate in size to accommodate the household size (according to the appropriate income level category “Rent-Limits” Table listed above).

1. In the order of selection, candidates will have 24 hours to notify the property manager of their unit selection.
2. Within 14 days of unit selection, candidates will be required to sign a rental lease agreement as shown in Appendix C – “Rental Lease Agreement”, below.
3. Failure to submit a signed Rental Lease Agreement and obtain final approval from the property manager within the allotted time will result in the removal from the unit priority list and the next priority applicant will be invited to submit a signed Rental Lease Agreement for final approval by the property manager.
4. If after review of the signed Rental Lease Agreement, and in-person interview with the property manager, it is determined that a candidate does not meet the selection parameters of the Affordable Unit, it will result in a removal from the priority list and the next priority applicant will be invited to submit a signed Rental Lease Agreement.
5. The process will continue until all units are reserved.
6. The property manager will maintain the remaining first-come first served participants as a future “lease-up waitlist”. This list shall be maintained for a minimum of 3 years. At which time that a unit becomes available, and the list is exhausted, candidates will then be considered and qualified on a first come/first serve basis at that time.

### Lottery Process (if applicable)

No less than 60 days prior to occupancy of the Affordable Housing Units, a publicly noticed lottery will be held by the landowner, or an approved third-party (e.g. housing non-profit). Application screening will occur by the landowner or an approved third-party to ensure candidates meet the stipulated requirements.

1. A publicly noticed lottery will occur at a set date, time and location to determine unit selection priority. Candidates do not need to be present at the time of the lottery.
2. All entries in the lottery will be pulled and provided with a corresponding unit priority number.
3. In the order of selection, candidates will have 24 hours to notify the property manager of their unit selection.
4. Within 14 days of unit selection, candidates will be required to sign an approved rental lease agreement as shown in Appendix C – “Rental Lease Agreement”, below.
5. Failure to submit a signed Rental Lease Agreement within the allotted time will result in the removal from the unit priority list and the next priority applicant will be invited to submit a signed Rental Lease Agreement.
6. If after review of the signed Rental Lease Agreement, and in-person interview with the property manager, it is determined that a candidate does not meet the selection parameters of the Affordable Housing Unit, it will result in a removal from the priority list and the next priority applicant will be invited to submit a signed Rental Lease Agreement.
7. The process will continue until all units are reserved.
8. The property manager will maintain the remaining lottery participant as a future “lease-up waitlist”. This list shall be maintained for a minimum of 3 years. At which time that a unit becomes available, and the list is exhausted, candidates will be considered and qualified on a first come/first serve basis.

### Possible Reasons for Denial

The following non-inclusive lists identifies parameters which are possible reasons for exclusion from leasing Affordable Units:

1. Household Income does not meet the identified Affordable Income Level.
2. Household size does not correspond with the available unit size.
3. Candidate does not intend to use the unit their primary residence.
4. Candidate does not participate in the in-person interview with the property manager.
5. Candidate does not have a valid Social Security number and a legal photo identification.
6. Candidate has been a recipient of an eviction notice within the last 5 years.
7. Candidate has been convicted of a drug related (within 5 years) violent (within 10 years) or be subject to a state sex offender lifetime registration requirement.
8. Candidate exhibits blatant disrespectful, disruptive, or antisocial behavior towards the property manager, staff, other applicants, or tenants.
9. Candidate has a negative landlord recommendation.
10. Candidate has been found to have falsified information in the application.
11. Candidate fails to update the application for the waiting list when requested.
12. Candidate is under 18 years of age.
13. If a candidate is not accepted, the prospective candidate will be notified in writing by the property manager as to the reason for denial and given 10 days to correct or clarify, if appropriate, the canceling information and resubmit.

### Violence Against Women Act (VAWA) Protections

The property manager may not consider incident of domestic violence, sexual assault, dating violence or stalking as serious or repeated violations of the lease or other “good cause” for termination of tenancy or occupancy of a victim who is protected from acts under the domestic or family violence laws of the jurisdictions.

The property manager may not consider criminal activity directly relating to abuse, engaged in by a member of a tenant’s household or any guest or other person under the tenant’s control, cause for termination of assistance, tenancy, or occupancy rights of the tenant or an immediate family member of the tenant’s family is the victim or threatened victim of that abuse.

The property manager may request in writing that the victim, or a family member of the victim’s behalf, certify that the individual is a victim of abuse and that the Certification of Domestic Violence, Dating Violence or Stalking Form HID-91066, or other documentation as noted on the certification form, be completed and submitted within 14 business days, or an agreed upon extension date, to receive protection under the VAWA. Failure to provide the certification or other supporting documentation within the specified time frame may result in eviction.

### Grievance Procedure

If a candidate is not accepted and the reason for denial is not able to be remedied, the candidate has the option to write a letter of grievance to the property manager. The property manager shall provide a written response within 30 days.

### Waitlist

As Affordable Units become available for subsequent rental, prospective candidates will be determined through a consultation with the project “lease-up waitlist”. The initial waitlist will consist of those candidates which participated in the initial application process. Future interested parties which complete an application can be added to the waitlist on a first-come first-served basis.

### Annual Income Recertification

In accordance with the City of Santa Barbara Affordable Housing Policies and Procedures, candidates which occupy an Affordable Unit will be required to participate in an annual income re-certification process. The recertification process shall be similar in detail to the level of information provided upon initial application qualification in accordance with the United States Department of Housing and Community Development CFR 5.609.

## Attachment A: Utility Allowance Schedules For Affordable UNITS

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## Attachment B: Application for Affordable Housing UNIT

## Attachment C: RENTAL LEASE AGREEMENT