2013 NOFA

FOR PRESERVATION AND REHABILITATION OF EXISTING AFFORDABLE RENTAL HOUSING

ADDENDA

CITY OF OAKLAND

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

SEPTEMBER 10, 2013

ADDENDA

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ADDENDUM #1: MINIMUM DEVELOPER QUALIFICATIONS

This section contains criteria for assessing developer experience, competence, and capacity. The criteria can help developers and development teams to evaluate the likelihood of obtaining City funding. Staff is available to discuss any of the criteria provided herein.

DEVELOPER QUALIFICATIONS

The following set of developer criteria apply to the development entity that has applied for funding. All development entities applying for funding must meet the experience requirements below. A developer which does not meet the criteria for experience may joint-venture with a developer which does. Joint-venture criteria are outlined below in Section III.

I. Nonprofit Developers

DEVELOPMENT EXPERIENCE. The development entity applying for funding must have experience successfully completing at least three affordable housing development projects. At least one of the completed projects must be similar to the project for which funding is being sought. Developers must submit the following information concerning completed projects.

- 1. The type of project developed (Number of units, funding sources, total development cost, new construction or rehabilitation).
- **2.** Location of project.
- 3. Date of project start and completion.
- **4.** List of staff members involved in the development of the project.
- **5.** The income level of the households that were served.
- **6.** Name, title, and telephone number of staff member of local governing body most familiar with the project.
- 7. Whether project was on time and on budget (relative to schedule and budget at start of construction)

COMMUNITY HOUSING DEVELOPMENT ORGANIZATIONS (CHDOs). For organizations qualifying as CHDOs for the purposes of HOME funding, the staff with development experience must be paid employees on staff at the organization (not consultants, contractors, board members, or volunteers).

II. FOR-PROFIT DEVELOPERS

In general, the experience of a for-profit developer will be treated similarly to the experience of a nonprofit developer. For-profit developers must also submit the resumes of the firm principals.

III. JOINT VENTURES

- A. Prior to funding approval, the City must review and approve all joint venture agreements. In all joint ventures, a majority interest and control must be held by the development entity meeting the City requirements for experience as described in Sections I & II above.
- **B.** If the joint venture entity is composed of a for-profit developer and a nonprofit developer, the City will decide which criteria are applicable by determining which joint venture partner has the majority interest in the management and operation of the joint venture

In special circumstances only, the City may approve joint-venture agreements in which the development entity meeting the City experience requirements does not hold a majority interest in the development, but holds control over key development and management decisions.

IV. LIMITED PARTNERSHIPS

For projects proposed as limited partnerships, the City reserves the right to approve the limited partnership agreement.

DEVELOPMENT TEAM QUALIFICATIONS

The following section addresses the required elements of the development team. Resumes must be included for each development team member to document their qualifications and experience.

I. REQUIRED EXPERIENCE OF THE DEVELOPMENT TEAM

A. Developer Project Management: Experience with 3 similar projects is required.

- 1. Please show experience with at least 3 projects similar to the project proposed.
- 2. Please show that the lead staff person assigned has completed one project from start to finish, which should be of the same general type and complexity as the project being proposed.
- Submit resumes and job descriptions of key staff.

B. Architect: Experience with 3 similar projects is required.

- 1. Please show experience with at least 3 projects similar to the project proposed.
- 2. Please show experience with a project that was financed by similar types of funding sources (e.g. local, state or federal). Experience in this area is desirable, not mandatory.
- 3. Please show experience with similar construction types, e.g. steel or wood frame, podium construction.
- 4. If this is unusually complex, please demonstrate experience with a project of similar complexity.
- 5. Please show that the lead staff person assigned to the project has the required experience.
- 6. Submit resumes and job descriptions of key staff.

C. Attorney: If the developer uses different law firms for different aspects of the projects, then key staff for the assignment should have experience in the relevant area.

- 1. Please show experience in housing and redevelopment law.
- 2. Please show experience in corporation law (nonprofit corporate law desirable, if a nonprofit developer is involved).
- 3. Please show experience in real estate law.
- 4. Please demonstrate experience in low income housing tax credit syndication (if the project is proposed to be syndicated).
- Submit resumes and job descriptions of key staff.

D. Development and/or Financial Consultant: Experience with 3 similar projects required. A development consultant is not required if the developer and development team possess sufficient experience.

- 1. Please show experience with a project that was financed by similar types of funding sources (e.g. local, state or federal). Experience in this area is mandatory.
- 2. If this project is unusually complex, please demonstrate experience with a project of similar complexity. Please show that the lead staff person assigned has completed one project from start to finish, which should be of the same general type and complexity as the project being proposed.
- Submit resumes and job descriptions of key staff.

- E. General Contractor: Experience with 3 similar projects required. Designation of a general contractor is not required with the NOFA application submission. Upon designation of a general contractor, the following information must be submitted as part of the City approval process.
 - 1. Please demonstrate experience with similar construction types, e.g. steel or wood frame, podium construction.
 - 2. If this project is unusually complex, please demonstrate experience with a project of similar complexity.
 - Please show experience with prevailing wage/Davis-Bacon requirements.
 Experience in this area is desirable. If contractor has been involved with a previous project partially financed by the City, previous performance will be considered.
 - Please show experience with local hiring programs. Experience in this area is desirable. If contractor has acted on a previous project partially financed by the City or, previous performance will be considered.
 - 5. Please demonstrate that the contractor has the capacity to take on the project.
 - 6. Please show that the on-site construction supervisor has the experience required of the contractor.
 - 7. Submit resumes and job descriptions of key staff including the on-site manager.
 - 8. Submit evidence that the contractor has the ability to obtain the required labor and materials, and performance bonds in an amount equal to one hundred percent (100%) of the construction contract amount.

F. Property Manager

- 1. Submit evidence of experience with 3 similar projects.
- 2. Submit list of all projects managed within the past five years and show the current status.
- 3. Submit evidence of experience with the management of projects that are subject to rent and occupancy restrictions.
- 4. If the proposed project is unusually complex, please demonstrate experience with a project of similar complexity.
- 5. Please show that the lead staff person assigned has the same management experience that is required of the manager.
- 6. Please provide evidence that the management company has the capacity to take on the project.
- 7. Submit resumes and job descriptions of key staff.

G. Developer as Builder

If the developer desires to act as the builder, all the requirements that have been listed under "E. Contractor" must be met by the developer.

H. Developer as Property Manager

If the developer desires to act as the property manager, all the requirements that have been listed under "F. Property Manager" must be met by the developer.

Addendum #2: Guidelines for Developer Fees on Housing Development Projects

Maximum Administration Fee

Administrative fees are permitted up to \$5,000 per unit and up to \$150,000 per project. Applicants who previously received a NOFA award and are reapplying for additional funds are only eligible to request a total maximum administration fee of \$150,000 per project. This fee is subject to negotiation with the City, and may be reduced for projects with small funding requests. The City may approve a higher fee for projects leveraging significant outside financing, as long as the additional fee is paid from a source other than NOFA funds. Additionally, the City will retain an amount equal to 25% of the administrative fee to be paid upon receipt and approval of a cost certification, HOME completion report (if applicable), and tenant lease up report.

Project sponsors are allowed an Asset Management fee that may not exceed \$10,000 annually. Projects financed with tax credits may take an additional Partnership Management fee of up to \$15,000 annually. Partnership/Asset Management fees may increase by 3% per year and are only allowed to the extent cash flow is available after payment of operating expenses, debt service, and deposits to reserves.

The fee for each project is subject to approval by the City of Oakland. Note that fees may also be capped by other financing sources.

Administration fees are contingent upon satisfactory completion of the project. Where project costs exceed the approved budget, developers may be required to contribute a portion of the developer fee toward the excess costs.

Schedule for Disbursements

The approved total administration fee for the project will be earned based on a schedule agreed upon by the City and the developer. The following standard schedule of disbursement applies, <u>and is expected to be implemented</u>.

- 1. 25% upon securing firm commitments for all financing and closing City loan.
- 2. 25% upon start of construction.
- 3. 25%, upon 50% of construction/rehabilitation completion.

 25%, upon City review and approval of final cost certification, HOME completion report (if applicable), and tenant lease up report. (Please refer to Program Description and Requirements for additional details on the final cost certification process).

Costs Included In Developer Fee

Any funds disbursed to the developer or sponsor for administrative costs, provision of guarantees, or fees for services are considered to be a portion of the developer fee. Payments into reserves required by lenders or investors will not be included, but payment of fees for guaranteeing against operating deficits will be included. Specific examples of items to be treated as fees (in addition to any fees charged by the developer) include:

- 1. Administration
- 2. Staff costs, <u>including development consultants</u> (but not historic preservation, environmental, or syndication consultants)
- 3. Net worth guarantee fees
- 4. Marketing and/or rent-up supervision fees
- Tax credit compliance guarantee fees
- 6. All credit consultant fees
- 7. Real estate brokerage fees paid to a related party
- 8. Loan brokerage fees paid to a related party
- 9. Processing agent fees
- 10. Developer overhead and profit
- 11. The cost of any personal guarantees
- 12. Reserves in excess of those customarily required by multi-family housing lenders.

Treatment of "Partnership Management" or "Asset Management" Fees

A maximum Partnership Management fee of \$15,000 is allowed to be paid to the General Partner of a tax credit project for handling investor relations, tax preparation, etc. A maximum Asset Management fee of \$10,000 is allowed for all projects (including those without tax credits) for handling ongoing asset management tasks. The combined Partnership and Asset Management fee should not exceed \$25,000 and may increase at up to 3% per year. Both fees may be paid from project cash flow after debt service and deposits to reserves. Where the fee is funded in advance from syndication proceeds, it should be placed in escrow and paid out over time to ensure a steady stream of income to cover these costs.

Incentive Management Fee

For nonprofits, if a project has no monitoring findings or other violations of City or other agreements, and if excess cash flow from operations is available after payment of operating costs, senior debt, deferred developer fee, and reserves, the borrower may keep 50% of the remaining cash flow as an Incentive Management Fee. This additional fee must be approved by the City annually and may be used for projects and activities that would contribute directly to the borrower's (or its nonprofit affiliate's) activities relating to its affordable housing and community development activities only.

Addendum #3: Affirmative Fair Marketing Procedures

I. Policy on Nondiscrimination and Accessibility

- 1. Owners and managing agents of housing assisted by the City of Oakland (the "City") must not discriminate against potential tenants or purchasers on the basis of race, color, religion, sex, physical or mental (including cognitive, developmental or emotional) disability, familial status (presence of child under age of 18 and pregnant women), national origin, ancestry, age, marital status, sexual orientation, gender identity or expression, having Acquired Immune Deficiency Syndrome (AIDS) or AIDS related conditions (ARC), source of income, any arbitrary basis, or any other status protected by federal, state or local law.
- 2. In addition, owners must undertake affirmative marketing efforts to reach persons that are unlikely to apply for housing due its nature, location or other factors.
- Developers receiving Federal funds are required to create units that are accessible
 to people with disabilities. At least five percent of new units must be accessible to
 people with mobility impairments and at least two percent must be accessible to
 people with hearing or vision impairments.
- 4. In addition to Federal laws requiring units for people with physical disabilities, fair housing laws require owners to make reasonable accommodations to people with all types of disabilities who request accommodations due to disability at any time during the application, resident selection and rent-up process. In doing so, owners are required to make and pay for structural and non-structural modifications to dwelling units and common areas when needed as a reasonable accommodation for tenants or applicants with disabilities. In such cases where providing a requested accommodation would result in an undue financial and administrative burden, developers are required to take any other action that would not result in an undue burden.
- 5. All developers who receive funds from the City are required to enter into loan agreements, and regulatory agreements or affordability agreements with the City prior to receiving any funds. These agreements are designed to bind the recipients to all of the program requirements, including the affirmative fair marketing procedures.

The following document outlines the affirmative fair marketing procedures that must be adhered to by developers and owners of housing units assisted by the City.

II. Training

- The owner and managing agent shall provide property management staff with all relevant regulations and fair housing provisions. All property management staff shall be required to follow the procedures and policies adopted by the owner and managing agent.
- Property management staff shall annually receive instruction regarding fair housing laws and the development's Affirmative Fair Marketing Plan. Formal training programs shall include marketing, outreach, data collection, reporting, and record keeping.

III. Methods and Practices for Informing the Public

- 1. In order to inform the public, owners, and prospective tenants about Federal fair housing laws and the City's affirmative marketing policies, the City will include the Equal Housing Opportunity logo and/or slogan, and a logo and/or slogan indicating accessibility to persons with disabilities, in all press releases, solicitations, and program information materials.
- 2. In addition, the City provides funding to a number of fair housing agencies to provide information and counseling regarding fair housing laws and policies.

IV. Marketing and Outreach

 As a condition of the agreements, not less than 180 days prior to project completion, owners must submit proposed marketing and management plans to the City for review and approval. Prior to commencing marketing activities, owners will be required to meet with City staff to review the proposed marketing strategy to ensure that affirmative marketing efforts will be employed.

Marketing plans must include information on strategies for reaching persons and groups not likely to apply including, but not limited to, households that include a member with disabilities. Marketing plans must also include procedures for ensuring that people with disabilities who request accessible features are given preference for occupancy of accessible units, as described below. Management plans must include policies for ensuring reasonable accommodation for persons with disabilities. Management plans must also contain policies and provisions for

recordkeeping and monitoring. The City will provide written guidance on selection of tenants and reasonable accommodation during occupancy, if requested.

2. All advertising shall display the Equal Housing Opportunity logo and/or the phrase "Equal Housing Opportunity", and a logo and/or slogan indicating accessibility to persons with disabilities. Fair housing posters must be displayed at the project rental or sales office.

Marketing plans must include use of a welcoming statement to encourage people with disabilities to apply for units, as well as a description of available units, accessible features, eligibility criteria, and the application process. The City will provide developers with sample notices, if requested.

Marketing plans must indicate that qualified applicants with disabilities who request accommodation <u>shall receive priority</u> for the accessible units. Open houses and marketing offices must be accessible to allow persons with disabilities to visit the site and retrieve information about accessible units.

3. Owners are required to advertise in newspapers of general circulation, and to provide notice to community groups when units become available.

Marketing shall include the use of newspapers of general circulation in Oakland. The managing agent shall place notices in newspapers, specialized publications, and newsletters to reach potential residents. Applications, notices, and all publications will include a Fair Housing and Equal Opportunity Logo, and the Accessibility Logo. Community media advertisement of the projects may include the following:

- a. Oakland Tribune
- b. Oakland Post
- c. El Mensajero (Spanish)
- d. Sing Tao Daily Newspaper (Chinese)
- e. Eden I&R, Inc. 2-1-1- Information and Referral Line
- 4. Consistent with the resident population each development was designed to serve, the marketing of <u>the project</u> must ensure equal access to appropriate size units for all persons in any category protected by Federal, state, and local laws governing discrimination.

Owners are required to engage in special outreach to persons and groups in the housing market area who, in the absence of such outreach are not likely to apply for the housing. In determining what special outreach is needed, owners should take into account past patterns of discrimination, the racial and ethnic makeup of the neighborhood, language barriers, location, or other factors that might make it less likely that some persons and groups (a) would be aware of the availability of the housing or (b) would be likely to apply for the housing.

Special marketing outreach consideration will be given to the following underserved populations:

- a. African-Americans
- b. American Indians
- c. Hispanics
- d. Asians and Pacific Islanders
- e. Persons with disabilities and persons with special supportive housing needs
- f. Very low income households of all types (including persons making the transition from homelessness to permanent housing)
- g. Immigrants
- h. Non-English speaking residents
- i. Large families
- 5. In particular, owners are required to advertise in media which are reasonably likely to reach such targeted groups, and to provide notice to community organizations, fair housing agencies, and other similar organizations. A list of local disability organizations and community development boards will be provided by HCD if requested. HCD will also provide developers with sample advertisements if requested.

Multilingual advertising is encouraged where such efforts would result in reaching persons and groups not likely to apply. Owners and managers must ensure that people with limited English proficiency are not discouraged from applying or discriminated against and are encouraged to provide translation assistance or referrals to community-based organizations that can assist with translation.

V. Specific Procedures for Ensuring that Accessible Units are Occupied by People with Disabilities who Require Accessible Features

- Outreach by owners to the disability community shall include the distribution of notices describing:
 - a. the availability of all units;
 - specific information regarding the availability and features of accessible units:
 - c. eligibility criteria; and
 - d. application procedures

- 2. All application forms shall include information indicating that people with disabilities requiring accessible features shall receive priority for accessible units. The application must include a section to be filled out by any applicant requesting an accommodation with details on the applicant's special needs for accessible features or other accommodations. Under no circumstance should an applicant be required to disclose a disability unless requesting an accommodation. (Housing units targeting seniors or people with disabilities may request documentation of age or disability to verify eligibility, but only if the same questions and documentation are asked of all applicants.) This will allow developers to provide, upfront, any necessary accessible features and/or accommodations for those people requesting accommodations. For more information on tenant selection, request the document entitled "Selection of Individual Tenants."
- 3. Owners shall take reasonable nondiscriminatory steps to maximize the utilization of accessible units by eligible individuals whose disability requires the accessibility features of the particular unit. To this end, any vacant, accessible unit should first be offered to a current, tenant with disabilities of the same project or comparable project under the owner's control. The occupant with disabilities must require the features in the vacant unit and must be occupying a unit not having such features. If no such occupant exists, the developer shall then offer the unit to a qualified applicant on the waiting list who has a disability requiring the accessibility features of the unit.
- 4. Owners may offer an accessible rental unit to an applicant without a disability after efforts have been exhausted to occupy the unit by an individual with a disability. However, the owner shall require such an applicant to agree to move to an available comparable non-accessible unit when the accessible unit is needed by a household that includes a member with disabilities. Such an agreement should be incorporated into the lease.
- 5. Note: An owner may not prohibit an eligible family with a member who has a disability from accepting a non-accessible unit which may become available before an accessible unit. Owners are generally required to modify such a non-accessible unit as needed or move a household that includes a member with disabilities into a unit that can be altered. If the modifications would result in an undue financial and administrative burden or alteration in the nature of a program, the owner is required to take any other action that would not result in an undue burden. All applicants should be provided information about how to request a reasonable accommodation at the time they apply for admission and at every recertification.

VI. Procedures for Complaints

- The owner shall maintain written procedures indicating how applicants or tenants can file complaints regarding fair marketing and/or alleged discriminatory practices.
- 2. Owner shall promptly investigate all applicant or tenant complaints and shall take corrective actions as necessary.
- Owner shall maintain records of all such complaints, investigations and corrective actions.

VII. Compliance Assessment

- 1. The owner and managing agent must review the project's marketing and management plans at least every five years and update as needed to ensure compliance. The advertising sources shall be included in the review to determine if past sources should be changed or expanded.
- 2. The owner and managing agent shall annually assess the success of affirmative marketing actions for each project. If the demographic data of the applicants and residents vary significantly from the jurisdiction's population data for the target income group, advertising efforts and outreach should be targeted to underrepresented groups in an attempt to balance the applicants and residents with the demographics of the jurisdiction.

VIII. Data Collection and Record Keeping

- 1. Owners must establish and maintain an Affirmative Fair Marketing file for each project to hold advertisements, flyers, and other public information documents to demonstrate that the appropriate logo and language have been used. Additionally, owners must keep records of activities to implement the affirmative marketing plan, including other community outreach efforts and an annual analysis. Upon request, owners are required to submit to the City copies of all advertisements indicating the date the advertisements were placed and the media outlets which were used. Owners must also provide copies of notices sent to community groups and a listing of those groups to which notices were sent. Owners must maintain records for at least five years regarding marketing and tenant selection practices.
- 2. Owners shall keep up-to-date records for each project regarding the characteristics of persons applying for vacant units, persons selected to occupy units and residents of the project (including race, ethnicity, presence of children under the age of 18 in the household, requests for reasonable accommodation for a

disability, income, and household size), and records about tenant selection or rejection. <u>Under no circumstance should an applicant be required to disclose a disability unless requesting an accommodation.</u> (Housing units targeting seniors or people with disabilities may request documentation of age or disability to verify eligibility, but only if the same questions and documentation are asked of all applicants.) <u>Applicants cannot be discriminated against due to the presence of children in the household.</u>

- 3. Application materials must include the "City of Oakland Race and Ethnic Data Intake Form" or a substantially equivalent form. The owner and managing agent are required to offer each household member the opportunity to complete the form. Parents or guardians are to complete the form for children under the age of 18. Completed documents for the entire household shall be stapled together and placed in the household's file.
- 4. Owners must maintain information regarding the location, description and number of vacant and occupied accessible units. In addition, owners must track and keep records of accessible and non-accessible units that are occupied by tenants requesting reasonable accommodations for a disability. Owners also should document any reasonable accommodations made to, or requested by, tenants during the reporting year.

IX. Reporting and Monitoring

- 1. As part of the City's monitoring of assisted housing developments, the City may review the owners' records to verify that either:
 - Each household living in a physical and sensory accessible unit has at least one household member who needs the accessible features of the unit; or
 - b. If an accessible unit is not occupied by a household who has at least one household member who needs the accessible features of the unit, the owner will verify that no such households (either current or prospective tenants) are on a waiting list for the accessible unit. The owner will also provide documentation that the current occupants agree to move to a comparable non-accessible unit when the accessible unit is needed by a household that includes a member with disabilities.
- 2. The owner and managing agent shall provide the City access to any pertinent books, documents, papers or other records of their City-assisted properties, as necessary, for determining compliance with civil rights and nondiscrimination requirements.
- 3. The duration of monitoring of Affirmative Fair Housing Marketing (AFHM) requirements varies with each housing program. For homeownership programs,

AFHM requirements apply through the completion of initial sales transactions on units covered by the approved AFHM plan. For assisted rental housing, AFHM requirements apply throughout the term of the loan and regulatory agreements, including those periods when the project does not maintain occupancy. Assisted housing developments must comply with <u>current</u> City Affirmative Fair Housing Marketing requirements, not the policies in effect when the regulatory agreement was executed. Owners are responsible for researching and implementing the City's current requirements.

X. Assessment of Success and Corrective Actions

- The City will review records maintained by owners to ensure that affirmative fair marketing requirements are being met. Where the characteristics of applicants are significantly different from the make-up of the City's population (i.e., in cases where specific groups are over-represented or under-represented), the City will examine in more detail the owner's actions to determine if a violation of the requirements has occurred.
- 2. The City may employ a variety of corrective actions. Initially, owners who have not fully complied with the requirements will be directed to engage in targeted marketing efforts to reach groups not initially reached. In cases where owners refuse to comply with the affirmative fair marketing procedures, the City may take additional actions to secure performance under the loan agreement or regulatory agreement, including declaring the loan in default and recapturing the funds.

Attachments

Attachment A: Additional Resources Available from the City of Oakland

Attachment B: Sample Advertisement/Listing

Attachment A

Additional Resources Available from the City of Oakland

- List of local disability organizations (available from CDBG Program)
- List of local HUD-approved housing counseling organizations, if applicable (available from Homeownership Program)
- List of City-trained loan consultants, if applicable (available from Homeownership Program)
- List of City-trained real estate professionals, if applicable (available from Homeownership Program)
- Sample Notice of Housing Availability
- Housing Logos and Slogans
 - Accessibility for Persons with Disabilities Logo and Slogan
 - o Equal Housing Opportunity Logo and Slogan
- Reasonable Accommodation Sample Notice and Forms
 - Sample Notice of Right of Reasonable Accommodation
 - o Sample Request for a Reasonable Accommodation Form
 - Sample Unit Transfer Request Form
 - o Sample Verification of Need for a Reasonable Accommodation Form
 - o Sample Response to a Request for Reasonable Accommodation Form
- Legal Considerations During Screening and Intake
- Operation and Management of Housing
- City of Oakland Race and Ethnic Data Intake Form and Instructions
- HUD-27061 "Race and Ethnic Data Reporting Form" and Instructions

Attachment B

Sample Advertisement

(*Project name*), an affordable housing development in Oakland has (*studio*, 1, 2, 3, and/or 4) bedroom apartments available at reduced rents for qualified low income households. Applicants with disabilities are encouraged to apply. Income and other restrictions apply. (*Section 8 welcome*) Equal Opportunity Housing Provider.

Addendum #4: Income, Rent, Utility-Allowance and Owner-Occupied Housing Payment Limits

MAXIMUM RENTS ALLOWED UNDER CITY OF OAKLAND HOUSING PROGRAMS OAKLAND, CALIFORNIA

Effective Date: HOME Income Limit - March 13, 2013; Home Rent Limit- June 1 2013; Sec 8 FMRs - April 30, 2013

RENT LIMITATIONS	SRO ¹	0 Bdrm. ²	1 Bdrm.	2 Bdrm.	3 Bdrm.	4 Bdrm.	5 Bdrm.
30% of 25% of area median income ³	\$307	\$409	\$438	\$526	\$608	\$678	\$748
30% of 30% of area median income ³	\$368	\$485	\$519	\$623	\$729	\$814	\$898
30% of 35% of area median income ³	\$429	\$566	\$606	\$727	\$840	\$937	\$1,034
30% of 50% of area median income ³	\$614	\$818	\$876	\$1,052	\$1,215	\$1,356	\$1,496
30% of 60% of area median income ³	\$737	\$982	\$1,052	\$1,263	\$1,458	\$1,627	\$1,796
30% of 80% of area median income ³	\$846	\$1,128	\$1,208	\$1,450	\$1,675	\$1,869	\$2,062
30% of 110% of area median income ³	\$1,289	\$1,719	\$1,841	\$2,208	\$2,552	\$2,846	\$3,142
HOME Low Rents ⁴	n/a	\$818	\$876	\$1,052	\$1,215	\$1,356	\$1,496
HOME High Rents ⁴	n/a	\$892	\$1,082	\$1,347	\$1,547	\$1,706	\$1,864
Section 8 Fair Market Rent		\$892	\$1,082	\$1,361	\$1,901	\$2,332	\$2,682

⁽¹⁾ SRO units are single room units without both a kitchen and a bathroom.

Rents must be reduced by an allowance for tenant-paid utilities.

Sponsors may use the utility allowances under the federal Section 8 Program as published by the Oakland Housing Authority, or

sponsors may present documentation substantiating other figures.

See attached chart of the Oakland Housing Authority Section 8 Utility Allowances.

⁽²⁾ O Bedroom units have both kitchen and bathroom (efficiency and studio units)

⁽³⁾ Rent limits, except for HOME rents and Section 8 Fair Market Rents, have been held at the 2012 rents. Formula rents do not calculate based on 2013 income limit chart.

⁽⁴⁾ HOME units must comply with applicable HOME Low or High rents. Apply the most restrictive rent when different.

2013 Income Limits

City of Oakland Department of Housing and Community Development

Effective Date: HOME Income Limit - March 13, 2013; Home Rent Limit- June 1 2013; Sec 8 FMRs - April 30, 2013

		INCOME LIMITS, ADJUSTED FOR HOUSEHOLD SIZE								
INCOME	One	Two								
LEVEL	Person	Person	Person	Person	Person	Person	Person	Eight Person		
25% AMI	\$15,650	\$17,850	\$20,100	\$22,300	\$24,100	\$25,900	\$27,700	\$29,450		
30% of Area Median Income (Extremely Low Income)	\$18,750	\$21,400	\$24,100	\$26,750	\$28,900	\$31,050	\$33,200	\$35,350		
35% AMI	\$21,880	\$24,980	\$28,120	\$31,220	\$33,730	\$36,230	\$38,740	\$41,240		
40% AMI	\$25,000	\$28,550	\$32,130	\$35,680	\$38,550	\$41,400	\$44,280	\$47,130		
45% AMI	\$28,130	\$32,130	\$36,140	\$40,140	\$43,380	\$46,580	\$49,820	\$53,020		
50% of Area Median Income (CDBG Low Income)	\$31,250	\$35,700	\$40,150	\$44.600	\$48,200	\$51,750	\$55,350	\$58,900		
(Very Low Income)	4 01,200	422,222		, , , , , ,		401,100	,	400,000		
60% of Area Median Income	\$37,500	\$42,840	\$48,180	\$53,520	\$57,840	\$62,100	\$66,420	\$70,680		
65% AMI	\$39,400	\$45,020	\$50,635	\$56,240	\$60,780	\$65,265	\$69,790	\$74,275		
70% AMI	\$41,300	\$47,200	\$53,090	\$58,960	\$63,720	\$68,430	\$73,160	\$77,870		
75% AMI	\$43,200	\$49,375	\$55,545	\$61,680	\$66,660	\$71,590	\$76,530	\$81,460		
80% of Area Median Income (CDBG Moderate) (Low Income)	\$45,100	\$51,550	\$58,000	\$64,400	\$69,600	\$74,750		\$85,050		
100% of Area Median Income (Median Income)	\$62,500	\$71,400	\$80,300	\$89,200	\$96,400	\$103,500	\$110,700	\$117,800		
120% of Area Median Income	\$ 74,950	\$ 85,650	\$ 96,350	\$107,050	\$115,600	\$124,150	\$132,750	\$141,300		
150% of Area Median Income	\$93,750	\$107,100	\$120,450	\$133,800	\$144,600	\$155,250	\$166,050	\$176,700		

akland Housin	g Autn	ority				Effec	tive Ju	ne 1, 2	013	
SECTION	8 UTILIT	Y & APP	LIANCE A	ALLOWA	ICES FO	R TENAN	IT-PAID U	TILITIES		
PARTMENTS	3		STA	ANDAR	D ALL	OWAN	CES			
	Utility	SRO	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	тота
	Othity	SINO	OBK	TBK	ZBK	3 BK	4 BK	3 BK	OBK	IOIA
Cooking	Gas	3	5	5	6	7	7	8	9	
	Electric	3	4	5	5	6	7	7	8	
Space Heating	Gas	7	9	12	14	16	17	20	21	
	Electric	8	10	12	15	18	20	22	24	
Hot Water	Gas	4	6	6	10	12	14	18	20	
	Electric	8	11	12	13	15	18	21	24	
Electric (standard lights)	Electric	12	16	20	25	33	45	57	62	
Water		47	62	62	66	72	78	88	126	
Garbage		22	29	29	29	29	46	62	62	
			E	NERGY	/ EFFI	CIENT	ALLOV	VANCE	ES	
NSTRUCTION										
/1/2001 & AFTER		SRO	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	TOTA
Space Heating (efficient)	Gas	5	8	9	12	13	14	16	17	
	Electric	7	9	11	13	16	17	19	20	
Electric (efficient lights)	Electric	11	15	17	21	27	35	45	49	
				TENA	NT OV	VNED .	APPLIA	NCES		
		SRO	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	TOTA
Stove		6	6	6	6	6	6	6	6	
Refrigerator		6	6	6	6	6	6	6	6	

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SECT	ION 8 UT	ILITY & AI	PPLIANC	E ALLO	WANCES	FOR TEN	IANT-PA	D UTILITIE	S
1>									
HOUSES			ST	ANDAF	RD ALL	OWAN	ICES		
	Utility	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	TOTAL
Cooking	Gas	5	5	6	7	7	8	9	
	Electric	4	5	5	6	7	7	8	
Space Heating	Gas	11	15	22	28	34	40	44	
Space Heating	Electric	11	15	23	28	37	42	48	
	Liectric	- 11	10	25	20	37	72	40	
Hot Water	Gas	6	6	10	12	14	18	20	
	Electric	11	12	13	15	18	21	24	
Electric (standard lights)	Electric	18	22	27	39	51	64	70	
Water		63	64	70	78	86	94	99	
Garbage		29	29	29	29	46	62	62	
		Ε	NERG	Y EFFI	CIENT	ALLO'	WANC	ES	
DNSTRUCTION									
/1/2001 & AFTER		0BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	TOTAL
Space Heating (efficient)	Gas	9	13	19	23	28	33	36	
_	Electric	10	13	19	24	32	36	41	
Electric (efficient lights)	Electric	16	19	23	30	41	52	57	
			TENI	NIT O	AVNIED	A DDL L	ANCEC		
		TENANT OWNED APPLIANCES							
		0BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	TOTAL
Stove		6	6	6	6	6	6	6	IOIAL
Refrigerator		6	6	6	6	6	6	6	
						U.	<u>I</u>		
					∣Per M	onth C	:ost	\$	