

CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553



AGENDA

Tuesday, December 5, 2023

1:00 PM

HOUSING AUTHORITY

*JOHN GIOIA, CHAIR
FEDERAL D. GLOVER, VICE CHAIR
CANDACE ANDERSEN
DIANE BURGIS
KEN CARLSON
CYNTHIA JORDAN
JOANN SEGURA*

JOSEPH VILLARREAL, EXECUTIVE DIRECTOR, (925) 957-8001

The public may attend the Board meeting in person and remotely via call-in or Zoom. Board meetings are televised live on Comcast Cable 27, ATT/U-Verse Channel 99, and WAVE Channel 32, and can be seen live online at www.contracosta.ca.gov. Meetings of the Board are closed-captioned in real time.

Persons who wish to address the Board during public comment or with respect to an item on the agenda may comment in person or may call in during the meeting by dialing 888-278-0254 followed by the access code 843298#. A caller should indicate they wish to speak on an agenda item by pushing "#2" on their phone. Persons who wish to address the Board in person should complete the form provided for that purpose. Access via Zoom is also available using the following link: <https://cccounty-us.zoom.us/j/87344719204>. Those participating via Zoom should indicate they wish to speak on an agenda item by using the "raise your hand" feature in the Zoom app. To provide contact information, please contact Clerk of the Board at clerkoftheboard@cob.cccounty.us or call 925-655-2000. A Spanish language interpreter is available to assist Spanish-speaking callers. If the Zoom connection malfunctions for any reason, the meeting may be paused while a fix is attempted. If the connection is not reestablished, the Board will continue the meeting in person without remote access.

Public comments generally will be limited to two minutes per speaker. In the interest of facilitating the business of the Board, the total amount of time that a member of the public may use in addressing the Board on all agenda items is 10 minutes. Your patience is appreciated.

A lunch break or closed session may be called at the discretion of the Board Chair. Staff reports related to open session items on the agenda are also accessible online at www.contracosta.ca.gov.

1:00 P.M. Convene and call to order

1. **CONSIDER CONSENT ITEMS (Items listed as C.1 through C.6 on the following agenda) – Items are subject to removal from Consent Calendar by request of any Commissioner or on request for discussion by a member of the public. Items removed from the Consent Calendar will be considered with the Discussion Items.**

2. **DISCUSSION ITEMS**

- D.1** HEARING to consider adoption of Resolution No. 5256, entitled the "PHA (Public Housing Agency) Certifications of Compliance with the PHA Plan and Related Regulations including Required Civil Rights Certifications", approving the Housing Authority of the County of Contra Costa's Annual Plan for fiscal year 2024, including revisions to the Admissions and Continued Occupancy Plan and the Section 8 Administrative Plan. [23-1011](#)

Attachments: [A.1 CA011 FY24 50075-ST 2024.pdf](#)
[B.1 CA011 FY24 ACOP Summary of Changes.pdf](#)
[B.1 CA011 FY24 HCV Admin Plan Changes - Summary - 12.05.2023.pdf](#)
[B.1. CA011 FY24 Deconcentration Policy.pdf](#)
[B.1.a CA011 FY24 Housing Needs.pdf](#)
[B.2 CA011 FY24 New Activities.pdf](#)
[B.3 CA011 FY24 Progress goals.pdf](#)
[B.4 CA011 FY24 Capital Fund Statment - 12.05.2023.pdf](#)
[C.1 CA011 FY24 RAB suggestions.pdf](#)
[C.2 CA011 FY24 50077-SL - Executed.pdf](#)
[C.3 Resolution No. 5256 :CA011 FY24 50077.ST.HCV.HP.pdf](#)
[RAB Questions and Comments 2024.pdf](#)

- D.2 PUBLIC COMMENT (2 Minutes)

3. **CONSENT ITEMS**

- C.1** ADOPT the proposed 2024 meeting schedule for the Housing Authority of the County of Contra Costa Board of Commissioners, as recommended by the Housing Authority Executive Director. [23-880](#)

- C.2** ADOPT Resolution No. 5257 to approve collection loss write-offs in the public housing program in the amount of \$84,537.42 for the quarter ending December 31, 2023. [23-884](#)

Attachments: [Write Off Chart Memo Dec 2023.docx](#)
[Resolution for Collection Write Off DEC 2023.docx](#)

- C.3** APPROVE the purchase of a commercial property at 2601 Somersville Road in Antioch, CA in the amount of \$1,300,000 plus transaction fees for the purpose of transforming it into the East County office of the Housing Choice Voucher program. (100% Housing Choice Voucher Program) [23-881](#)

- C.4 APPROVE and AUTHORIZE the Executive Director of the Housing Authority of the County of Contra Costa, or designee, to execute a contract with the Contra Costa County Sheriff's Department in an amount not to exceed \$275,000 to provide the Housing Authority's Bayo Vista public housing development with additional law enforcement services for the period July 1, 2023 through June 30, 2024. [23-882](#)
- C.5 APPROVE and AUTHORIZE the Executive Director of the Housing Authority of the County of Contra Costa, or designee, to execute a contract with the City of Pittsburg in an amount not to exceed \$180,000 to provide the Housing Authority's El Pueblo public housing development with additional law enforcement services for the period July 1, 2022 through June 30, 2023. (100% U.S. Department of Housing and Urban Development) [23-883](#)
- C.6 RECEIVE the Housing Authority of the County of Contra Costa's investment report for the quarter ending September 30, 2023. [23-1012](#)

Attachments: [1 Investment Report for Qtr 09-30-23.pdf](#)

4. **ADJOURN**

AGENDA DEADLINE: Thursday, 12 noon, 12 days before the Tuesday Board meetings.

GENERAL INFORMATION

The Board meets in all its capacities pursuant to Ordinance Code Section 24-2.402.

Any disclosable public records related to an open session item on a regular meeting agenda and distributed by the Clerk of the Board to a majority of the members of the Board of Supervisors less than 96 hours prior to that meeting are available for public inspection at 1025 Escobar Street, First Floor, Martinez, CA 94553, during normal business hours.

All matters listed under CONSENT ITEMS are considered by the Board to be routine and will be enacted by one motion. There will be no separate discussion of these items unless requested by a member of the Board before the Board votes on the motion to adopt. Each member of the public will be allowed two minutes to comment on the entire consent agenda.

Persons who wish to speak on matters set for PUBLIC HEARINGS will be heard when the Chair calls for public testimony. Each speaker during public testimony will be limited to two minutes. After public testimony, the hearing is closed and the matter is subject to discussion and action by the Board. Comments on matters listed on the agenda or otherwise within the purview of the Board of Supervisors can be submitted to the office of the Clerk of the Board via mail: Board of Supervisors, 1025 Escobar Street, First Floor, Martinez, CA 94553 or to clerkoftheboard@cob.cccounty.us.

Time limits for public speakers may be adjusted at the discretion of the Chair.

The County will provide reasonable accommodations for persons with disabilities planning to attend Board meetings who contact the Clerk of the Board at least 24 hours before the meeting, at (925) 655-2000.

Anyone desiring to submit an inspirational thought nomination for inclusion on the Board Agenda may contact the Office of the County Administrator or Office of the Clerk of the Board, 1025 Escobar Street, Martinez, California.

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DISCLOSURE OF CAMPAIGN CONTRIBUTIONS

Pursuant to Government Code section 84308, members of the Board of Supervisors are disqualified and not able to participate in any agenda item involving contracts (other than competitively bid, labor, or personal employment contracts), franchises, discretionary land use permits and other entitlements if the Board member received, since January 1, 2023, more than \$250 in campaign contributions from the applicant or contractor, an agent of the applicant or contractor, or any financially interested participant who actively supports or opposes the

County’s decision on the agenda item. Members of the Board of Supervisors who have received, and applicants, contractors or their agents who have made, campaign contributions totaling more than \$250 to a Board member since January 1, 2023, are required to disclose that fact for the official record of the subject proceeding. Disclosures must include the amount of the campaign contribution and identify the recipient Board member, and may be made either in writing to the Clerk of the Board of Supervisors before the subject hearing or by verbal disclosure at the time of the hearing.



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 23-1011

Agenda Date: 12/5/2023

Agenda #: D.1

To: Contra Costa County Housing Authority Board of Commissioners

From: Joseph Villarreal, Executive Director

Date: December 5, 2023

Report Title: PUBLIC HOUSING AGENCY ANNUAL PHA PLAN HEARING FOR FISCAL YEAR 2024

Recommendation of the County Administrator Recommendation of Board Committee

RECOMMENDATIONS:

1. OPEN the public hearing for the Housing Authority's annual Public Housing Agency (PHA) Plan for fiscal year 2024, RECEIVE testimony, and CLOSE the public hearing.
2. ADOPT Resolution No. 5256, Attachment C.3 to this report, titled the "PHA Certifications of Compliance with the PHA Plan and Related Regulations including Required Civil Rights Certifications approving HACCC's Annual Plan for fiscal year 2024, including revisions to the Admissions and Continued Occupancy Plan and the Section 8 Administrative Plan."

BACKGROUND:

Any local, regional, or state agency that receives funds to operate a federal public housing or housing choice voucher (Section 8) program must submit a public housing agency (PHA) plan (PHA Plan). The PHA Plan is a template that outlines public housing agency policies, programs, operations, and strategies for meeting local housing needs and goals.

The annual PHA Plan provides details about the PHA's current programs, and the resident population served, as well as the PHA's strategy for addressing the housing needs of currently assisted families and the larger community. The annual PHA Plan also serves as the PHA's yearly request for grants to support improvements to public housing buildings (through the Capital Fund Program).

As required by the U.S. Department of Housing and Urban Development (HUD), the Housing Authority of the County of Contra Costa's (HACCC or Housing Authority) staff provided public notice of this hearing in the East, West, and Contra Costa Times on October 19th, October 20th, and October 21, 2023. Staff met virtually with the agency's Resident Advisory Board (RAB) on six different occasions to discuss the proposed Plan: September 19th, September 26th, October 10th, October 17th, October 24th, and November 21st, 2023. The RAB approved the proposed changes to the annual PHA Plan at their November 21st, 2023, meeting.

The following sections provide a synopsis of the major changes proposed by staff to the annual PHA Plan, its elements and to HACCC's policies. The specific proposed policies, with changes highlighted, are attached.

Public Housing

The proposed changes to HACCC's Public Housing Admissions and Continued Occupancy Plan (ACOP) are as follows:

- Updates throughout the ACOP to reflect new definitions under the Violence Against Women Act (VAWA) and include “human trafficking”.
 - Although the VAWA 2022 statute does not specifically include human trafficking in the list of victims protected under VAWA, in 2022 HUD began including human trafficking as part of the list of victims protected under VAWA (as seen in Notices PIH 2022-06, PIH 2022-22, and PIH 2022-24). In the absence of a final rule implementing VAWA 2022 and to mirror HUD’s recent usage, this policy includes human trafficking in addition to domestic violence, dating violence, sexual assault, and stalking anywhere such a list appears.
- Chapter 2: Fair Housing
 - updates regarding Discrimination Complaints under the Equal Access Final rule [Notice PIH 2014-20]
 - Notice PIH 2014-20 requires an articulated complaint process for allegations of discrimination under the Equal Access Final rule. The Equal Access Final Rule requires that PHAs provide equal access regardless of marital status, gender identity, or sexual orientation. The PHA will be informed of these obligations by the HUD Field Office or FHEO when an Equal Access complaint investigation begins.
 - VAWA Complaint Processing [Notice FHEO 2023-01].
 - A complainant may, not later than one year after an alleged VAWA violation has occurred or terminated, file a complaint with FHEO alleging such violation. If there is a violation that began prior to a year before the complaint is filed, but it continues into the one-year period, HUD will accept the complaint. FHEO will investigate the complaint if it is timely and FHEO otherwise has jurisdiction. If a complaint is filed more than one year after the alleged violation occurred or terminated, FHEO may, but is not required to, investigate the allegations under the additional authority and procedures described in FHEO 2023-01.
- Chapter 6: Income
 - Updates to language relating to the temporary hardship paragraph suspending the minimum rent for the 90-day period beginning the first month following the date the family’s request for a hardship exemption. After the 90-day suspension period, the family must resume payment of the minimum rent and must repay the HA the amounts suspended. HUD requires the PHA to offer a

reasonable payment agreement, on terms and conditions established by the PHA.

- Chapter 8: Leasing
 - Changes to the terms of the lease to include if the family is determined to be over income for 24 consecutive months.
 - Grammatical changes to the section relating to the smoke-free policy under exhibit 8-1: Smoke-free policy.
- Chapter 9: Reexamination
 - Addition of language in reference to over-income families and non-public housing over income families.
- Chapter 11: Community Service
 - Add language that a member of a non-public housing over-income family is exempt from community service.
- Chapter 13: Lease Termination
 - Addition of language in reference to over-income families and non-public housing over income families.
 - Updates to language regarding VAWA Protections against Terminations paragraph & in Limits on VAWA Protections paragraph.
 - Although the VAWA 2022 statute does not specifically include human trafficking in the list of victims protected under VAWA, in 2022 HUD began including human trafficking as part of the list of victims protected under VAWA (as seen in Notices PIH 2022-06, PIH 2022-22, and PIH 2022-24). In the absence of a final rule implementing VAWA 2022 and to mirror HUD's recent usage, this policy includes human trafficking in addition to domestic violence, dating violence, sexual assault, and stalking anywhere such a list appears.
 - PHAs and owners may not coerce, intimidate, threaten, interfere with, or retaliate against any person who exercises or assists or encourages a person to exercise any rights or protections under VAWA [FR Notice 1/4/23].
- Chapter 14: Grievances
 - Changes in the language of the grievance procedure process and definitions updates:

- Public housing tenants have the right to request a grievance hearing for any PHA action or failure to act in accordance with the tenant's lease.
- Grievance procedures do not apply in the following circumstances:
 - Disputes between tenants not involving the PHA or class grievances [24 CFR 966.51(b)].
 - The grievance procedure is not intended as a forum for initiating or negotiating policy changes between a group or groups of tenants and the PHA's Board of Commissioners [24 CFR 966.51(b)].
- When the PHA is in a HUD-declared due process state, HUD allows the PHA to exclude from the PHA grievance procedure any grievance concerning a termination of tenancy or eviction that involves:
 - Any criminal activity that threatens the health, safety or right to peaceful enjoyment of the premises of other residents or employees of the PHA; or
 - Any violent or drug-related criminal activity on or off such premises; or
 - Any criminal activity that resulted in felony conviction of a household member [24 CFR 966.51(a)(2)].
- Tenant: The adult person (or persons other than a live-in aide) who resides in the unit and who executed the lease with the PHA as lessee of the dwelling unit, or if no such person now resides in the unit, the person who resides in the unit and is the remaining head of the household of the tenant family residing in the dwelling unit.
- Resident organization: An organization of residents, which may also include a resident management corporation.
- The Grievance Procedure [24 CFR 966.51]
 - The grievance procedure is included by reference in all tenant dwelling leases and will be furnished to each tenant and all resident organizations [24 CFR 966.52 (b) and (d)].
 - Any changes proposed in this grievance procedure must provide for at least 30 days' notice to tenants and resident organizations, explaining the proposed changes and providing an opportunity to present written comments. Comments will be considered by the PHA before any revisions are made to the grievance procedure [24 CFR 966.52(c)].
- Informal settlement of a grievance [24 CFR 966.54]
 - Any grievance request must be personally presented, either orally or in writing

(including email), to the PHA's central office or the management office of the development in which the tenant resides within 10 days after the violation.

- As soon as the grievance request is received, it will be reviewed by the PHA to ensure it meets the requirements for a grievance hearing. If the tenant is not entitled to a grievance, the PHA will notify the tenant that they may instead seek judicial review and the procedures for requesting such a review [24 CFR 966.4(l)(3)(i)(C)(v)(B)].
 - Otherwise, within 15 business days, the tenant will be contacted to arrange a mutually convenient time to meet so the grievance may be discussed and settled without a hearing. At the informal settlement, the tenant will present their grievance.
 - Within fifteen business days following the informal settlement, the PHA will prepare and either hand deliver, mail, or email to the tenant a summary of the discussion. The summary will specify the names of the participants; the date of the meeting; the nature of the proposed resolution of the complaint, with specific reason(s); and will specify the procedures by which a formal hearing under this procedure may be obtained if the tenant is not satisfied [24 CFR 966.54]. A copy of this summary will also be placed in the tenant's file.
- Requesting a formal grievance hearing
 - If the tenant is not satisfied with the outcome of the informal settlement, the tenant must submit a written request for a hearing to the management office of the development where the tenant lives no later than five business days after receiving the summary of the informal settlement.
 - The written request must specify the reasons for the request and the action or relief sought from the PHA.
- Chapter 16: Program Administration - changes in the following definitions:
 - The term *domestic violence* includes felony or misdemeanor crimes committed by a current or former spouse or intimate partner of the victim under the family or domestic violence laws of the jurisdiction receiving grant funding, and in the case of victim services, includes the use or attempted use of physical abuse or sexual abuse, or a pattern of any other coercive behavior committed, enabled, or solicited to gain or maintain power and control over a victim, including verbal, psychological, economic, or technological abuse that may or may not constitute criminal behavior, by a person who is:
 - The current or former spouse or intimate partner of the victim, or person similarly situated to a spouse or intimate partner of the victim.
 - A person who is cohabitating or has cohabitated with the victim as a spouse or intimate

partner.

- A person with whom the victim shares a child in common.
- A person who commits acts against a youth or adult victim who is protected from those acts under the domestic or family violence laws of the jurisdiction.
- The term *economic abuse* means behavior that is coercive, deceptive, or unreasonably controls or restrains a person's ability to acquire, use, or maintain economic resources to which they are entitled, including using coercion, fraud, and manipulation to:
 - Restrict a person's access to money, assets, credit, or financial information.
 - Unfairly use a person's personal economic resources, including money, assets, and credit, for one's own advantage.
 - Exert undue influence over a person's financial and economic behavior or decisions, including forcing default on joint or other financial obligations, exploiting powers of attorney, guardianship, or conservatorship, or to whom one has a fiduciary duty.
- The term *technological abuse* means an act or pattern of behavior that occurs within domestic violence, dating violence, sexual assault, or stalking and is intended to harm, threaten, intimidate, control, stalk, harass, impersonate, exploit, extort, or monitor another person, except as otherwise permitted by law, that occurs using any form of technology, including but not limited to:
 - Internet enabled devices
 - Online spaces and platforms
 - Computers
 - Mobile devices
 - Cameras and imaging programs
 - Apps
 - Location tracking devices
 - Communication technologies
 - Any other emergency technologies
- Glossary - Changes to acronyms and definitions
 - *VAWA*. Violence Against Women Act

- **Alternative non-public housing rent.** A monthly rent equal to the greater of:
 - The applicable fair market rent, as defined in 24 CFR part 888, subpart A, for the unit; or
 - The amount of the monthly subsidy provided for the unit, which will be determined by adding the per unit assistance provided to a public housing property as calculated through the applicable formulas for the Public Housing Capital Fund and Public Housing Operating Fund.
- **Domestic violence.** Felony or misdemeanor crimes of violence committed by a current or former spouse or intimate partner of the victim under the family or domestic violence laws of the jurisdiction receiving grant funding, and in the case of victim services, includes the user or attempted use of physical abuse or sexual abuse, or a pattern of any other coercive behavior committed, enabled, or solicited to gain or maintain power and control over a victim, including verbal, psychological, economic, or technological abuse that may or may not constitute criminal behavior, by a person who is:
 - The current or former spouse or intimate partner of the victim, or person similarly situated to a spouse or intimate partner of the victim.
 - A person who is cohabitating or has cohabitated with the victim as a spouse or intimate partner.
 - A person with whom the victim shares a child in common.
 - A person who commits acts against a youth or adult victim who is protected from those acts under the domestic or family violence laws of the jurisdiction.
- **Economic abuse.** Behavior that is coercive, deceptive, or unreasonably controls or restrains a person's ability to acquire, use, or maintain economic resources to which they are entitled, including using coercion, fraud, and manipulation to:
 - Restrict a person's access to money, assets, credit, or financial information.
 - Unfairly use a person's personal economic resources, including money, assets, and credit, for one's own advantage.
 - Exert undue influence over a person's financial and economic behavior or decisions, including forcing default on joint or other financial obligations, exploiting powers of attorney, guardianship, or conservatorship, or to whom one has a fiduciary duty.
- **Flat rent.** Rent that is based on the market rent charged for comparable units in the private unassisted rental market, set at no less than 85 percent of the current fair market rent (FMR), 85 percent of the small area fair market rent (SAFMR), or 85 percent of the unadjusted rent, with utility allowances applied as necessary. The unadjusted rent is the FMR estimated directly from

source data that HUD uses to calculate FMRs in nonmetropolitan.

- **Human trafficking.** A crime involving the exploitation of a person for labor, services, or commercial sex. The Trafficking Victims Protection Act of 2000 and its subsequent reauthorizations recognize and define two primary forms of human trafficking:
 - Sex trafficking is the recruitment, harboring, transportation, provision, obtaining, patronizing, or soliciting of a person for the purpose of a commercial sex act in which a commercial sex act is induced by force, fraud, or coercion, or in which the person induced to perform such act has not attained 18 years of age. See 22 U.S.C. § 7102(11)(A).
 - Forced labor is the recruitment, harboring, transportation, provision, or obtaining of a person for labor or services, through the use of force, fraud, or coercion for the purpose of subjection to involuntary servitude, peonage, debt bondage, or slavery. See 22 U.S.C. § 7102(11)(B).
- **Non-public housing over-income family.** A family whose income exceeds the over-income limit for 24 consecutive months and is paying the alternative non-public housing rent.
- **Over-income family.** A family whose income exceeds the over-income limit.
- **Over-income limit.** The over-income limit is determined by multiplying the applicable income limit for a very low-income family, as defined in 24 CFR 5.603(b), by a factor of 2.4.
- **Technological abuse.** An act or pattern of behavior that occurs within domestic violence, dating violence, sexual assault, or stalking and is intended to harm, threaten, intimidate, control, stalk, harass, impersonate, exploit, extort, or monitor another person, except as otherwise permitted by law, that occurs using any form of technology, including but not limited to:
 - Internet enabled devices
 - Online spaces and platforms
 - Computers
 - Mobile devices
 - Cameras and imaging programs
 - Apps
 - Location tracking devices
 - Communication technologies

- Any other emergency technologies

Capital Fund

The Capital Fund program provides PHAs with annual funding from HUD for public housing development, financing, and modernization as well as for management improvements and security costs. Capital fund dollars cannot be used for luxury improvements, direct social services, costs funded by other HUD programs, or any other ineligible activities as determined by HUD on a case-by-case basis. PHAs must report annually on how they plan to use their capital funds.

The proposed PHA Plan shows ongoing and planned capital fund activity. The following projects are among the proposed for HACCC's Federal Fiscal Year (FFY) 2023 & 2024 capital fund grants:

- \$1,160,000 - Phase 2 modernization of Alhambra Terrace public housing development.
- \$790,000 - Replacement of select roofs at the Bayo Vista and Vista del Camino public housing developments.
- \$226,000 - Unscheduled and emergency unit modernization and site improvements at various properties.
- \$220,000 - Boiler replacement at the Kidd Manor development.
- \$139,000 - Non-routine maintenance repairs (ordinary maintenance items such as window and flooring replacement or electrical repair where the scale of damage is beyond the scope of day-to-day maintenance) at various properties.
- \$137,000 - Repair and replacement of concrete walks and driveways at various properties
- \$62,000 - Replace refrigerators, ranges, and other dwelling equipment.

Housing Choice Voucher

In addition to numerous grammatical changes, edits were made to the standard HUD language in the plan that introduces specific subject matter. These are not policy changes but regulatory edits from the Code of Federal Regulations. The following proposed substantial changes were made to the Housing Choice Voucher Program (HCV) Administrative Plan (Administrative Plan) as it pertains to HACCC Policy:

- Language was added to specify that Fair Housing complaints that impede fair housing choice will be reported not only to the State's Fair Housing and Equal Employment Office but also to the Department of Conservation and Development of Contra Costa County who is responsible for the Consolidated Plan.

- Clarified the Lifetime Registration ban for sex offenders to state that only Tier 3 and 4 registrants are banned from participation in Federally assisted programs.
- Families with Net Family Assets of more than \$100,000 and/or the family has a present ownership interest in, a legal right to reside in, and the effective legal authority to sell the real property (based on laws of the state or locality in which the property is located) that is suitable for occupancy by the family as a residence will not be eligible to continue to receive rental assistance and will be terminated from program participation. HACCC shall provide a grace period of six months from the effective date of the Annual or Interim Reexamination within which the assisted family may cure the noncompliance with the Net Asset threshold.
- Additions to the HCV wait list that are formalities for 3rd part referrals for special funding sources such as Mainstream, Family Unification/Foster Youth Initiative, VASH, Stability Vouchers, Emergency Housing Vouchers, or other similar funding sources that involve third-party agencies such as Health, Housing and Homeless Services or Employment and Human Services, etc., will not require public notice as indicated above for broad outreach waiting list efforts.
- Added new HUD Stability Vouchers to the list of Special Purpose funding HACCC receives.
- Added a newly funded program that is a subsidiary of the Family Unification Program called the Foster Youth to Independence Initiative (FYI). In addition to the program, a preference was added to ensure that referred FYI applicants are streamlined to the top of the wait list for immediate housing.
- The Housing Opportunity Through Modernization Act of 2016 (HOTMA) removed the statutory authority for the Earned Income Disallowance (EID), so HUD cannot retain the disallowance once the statutory change is in effect, which will be upon the effective date of this final rule. However, if a family is receiving a disallowance of increase in annual income in accordance with 24 CFR §§ 5.617(c) and 960.255(b) on this final rule's effective date, participants should be able to benefit from EID for the full 24 months. EID will be available only to families that are eligible for and participating in the program on the effective date of the final rule; no new families may be added.
- Under 24 CFR §§ 5.618(b)(1), when all net family assets have a combined value of \$50,000 or less, the family is to include on its self- certification that the combined value of net family assets do not exceed \$50,000, and the family expects to receive interest from the family's assets. This amount is to be included in the family's income. The PHA or owner may rely on this self- certification to serve as verification for both assets and the amount of actual income the family expects to receive from such assets.
- HACCC must calculate the imputed return on the combined value of all net family assets when the net family assets are more than \$50,000 if no actual income can be computed from any of the net family assets.

- Updated the deduction for an elderly or disabled family member from \$400 per household to \$525 per household subject to annual adjustments by HUD.
- Specifies that the inflationary index for all necessary adjustments will be based on the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W). , annual inflationary adjustments will be established by rounding to the nearest dollar except that annual inflationary adjustments for the dependent deduction (24 CFR § 5.611(a)(1)) and the elderly or disabled family deduction ((24 CFR § 5.611(a)(2)) will be rounded to the next lowest multiple of \$25.
- HUD expects to make the revised amounts effective January 1st of each year for the following requirements in accordance with the inflationary adjustments covered by this final rule: the value cap on net family asset cap for imputing returns (24 CFR § 5.609(a)(2) and (b)(1)); the mandatory deduction for elderly and disabled families (24 CFR § 5.611(a)(2)); the restriction on the net family assets (24 CFR §§ 5.618(a)(1)(i), 574.310(f)); the amount of net assets the PHA or owner may determine based on a certification by the family (24 CFR §§ 5.618(b)(1), 5.659(e), 92.203(e); 93.151(e); 574.310(e)(3)(ii); 960.259(c)(2), and 982.516(a)(3)); and the mandatory deduction for a dependent ((24 CFR § 5.611(a)(1)), which is also used to calculate the income exclusion for earned income of dependent students (24 CFR § 5.609(b)(14)) and adoption assistance payments (24 CFR § 5.609(b)(15)).
- The final rule makes a change from 3 to 10 percent of annual income for the threshold that applies to unreimbursed health and medical care expenses and reasonable attendant care and auxiliary apparatus deductions.
- HUD is creating two ways by which a family may qualify for health and medical care deductions and reasonable attendant care and auxiliary apparatus expenses hardship. First, a family may qualify for a lower threshold for unreimbursed health and medical care expenses and reasonable attendant care and auxiliary apparatus expenses to be deducted from income if the family, at the time of the effective date of this final rule, is receiving the unreimbursed health and medical care expense and reasonable attendant care and auxiliary apparatus expense deduction at the 3 percent threshold. However, even families not receiving a deduction for health and medical care expenses and reasonable attendant care and auxiliary apparatus expenses at the time that this final rule is effective may still qualify for a hardship exemption if the family is experiencing a change in circumstances that would not otherwise trigger an interim reexamination. Families seeking a hardship exemption in this category must have eligible expenses that exceed 5 percent of the family's annual income to receive the benefit of the hardship exemption. The final rule increased to 5 percent the first year, 7.5 percent the second year, and reaching the new statutory standard of 10 percent in the third year.
- HOTMA amendments do require that HUD, by regulation, specifically provide hardship exemptions when the financial difficulty faced by the family is due to specific circumstances around childcare or health and medical care and reasonable attendant care and auxiliary apparatus expenses. HUD is adding language to the childcare hardship exemption to specify that the resulting alternative adjusted income

calculation must remain in place for a period of up to 90 days.

- HUD also revised the language to clarify that the threshold for when a PHA, owner, or grantee must conduct a reexamination due to decreases in a family's income is a change of ten percent or a lower threshold set by the PHA or owner.
- Revised HUD requirements so that the use of Enterprise Income Verification (EIV) is required only at annual reexaminations, and not at interim reexaminations. However, PHAs and owners may use EIV for interim reexaminations if desired.
- If the tenant complies with the interim reporting requirements, the PHA, owner, or grantee must give the tenant 30 days advance notice of any rent increase, and the rent increase will be effective the first of the month commencing after the end of the 30-day period. If the tenant has complied with the interim reporting requirement and the tenant's rent will decrease, the change in rent is effective on the first day of the month after the date of action that caused the interim certification, for example the first of the month after the date of loss of employment. If the tenant does not comply with the interim reporting requirements, and the PHA, owner, or grantee discovers the tenant has failed to report changes as required, the PHA, owner, or grantee must initiate an interim reexamination and implement rent changes as follows: PHAs, owners, or grantees must implement any resulting rent increase retroactive to the first of the month following the date that the action occurred, and any resulting rent decrease must be implemented no later than the effective date of the first rent period following completion of the reexamination.
- HOTMA amends the 1937 Act so that PHAs and owners may not consider a family's increases of less than 10% in earned income for the purposes of an interim reexamination unless the family had previously undergone an interim reexamination during the year for a decrease in income.
- Amending the Administrative Plan language to state that an Interim Reexamination will be conducted when the family's income has increased by 10% or more of annual adjusted income and their share of rent will change because of the increase.
- HUD is modifying the language to exclude "nonrecurring" income received in the previous year that will not be repeated in § 5.609(b)(24). However, earnings as an independent contractor, day laborer, or seasonal worker are explicitly not within the category of excluded income.
- HUD is specifying certain forms of income that are included in the category of "nonrecurring" income that would be excluded from the calculation of income: work on the decennial Census (less than 180 days and not resulting in a permanent position) (24 CFR § 5.609(b)(24)(i)); direct Federal or State payments or tax credits intended for economic stimulus or recovery (24 CFR § 5.609(b)(24)(ii)); amounts received directly by the family as a result of State or Federal refundable tax credits or refunds at the time they are received (24 CFR § 5.609(b)(24)(iii) and (iv)); gifts for holidays, birthdays, or special occasions (24 CFR § 5.609(b)(24)(v)); in-kind donations from food banks or other organizations

(24 CFR § 5.609(b)(24)(vi)); and lump-sum additions to assets such as lottery or other contest winning (24 CFR § 5.609(b)(24)(vii)).

- With these revisions and additions, HUD intends to exclude from income sources of funds that cannot be relied upon to pay for a family's housing needs, while providing additional clarity to PHAs and owners about what funds should still be considered income, given the broad definition contained in HOTMA.
- HUD is expanding 24 CFR § 5.609(b)(19) to cover all payments to a family from a state agency, regardless of whether such a payment is through Medicaid for the care of a family member in order for them to remain in the unit. The final rule includes funding through any Medicaid structure, not just managed care. Furthermore, it also excludes payments from, or authorized by, State agencies in states which use a source of funding other than Medicaid to provide in-home support. HUD will continue to count payments for long-term care insurance as an unreimbursed health and medical care expense for purposes of 24 CFR § 5.611(a)(3)(i), but HUD clarifies that the payments cannot be excluded from the family's income.
- HUD is adding language in the final rule that payments to a member of the assisted family by the state Medicaid agency-managed care system or other state or federal agency (or other entities authorized by those agencies to make such payments) for caregiving services to enable a family member who has a disability to live in the assisted unit are covered payments and would be excluded from the family's income.
- HUD codifies a federally mandated income exclusion under section 479B of the Higher Education Act of 1965 (HEA) (20 U.S.C. 1087uu). Section 5.609(b)(9)(i) of the final rule excludes assistance that section 479B of the HEA requires to be excluded from a family's income. This provision excludes from income assistance to students under Title IV of the HEA even assistance in excess of tuition and required fees and charges. Student financial assistance must be a grant or scholarship received from the Federal government; a State, Tribal, or local government; a private foundation registered as a nonprofit; a business entity; or an institution of higher education. Furthermore, the grant or scholarship must be either expressly for tuition, book, supplies, room and board, or other fees required and charged to the student by the education institution; expressly to assist a student with the costs of higher education; or expressly to assist a student who is not the head of household or spouse with the reasonable and actual costs of housing while attending the education institution and not residing in an assisted unit.
- The final rule states that student financial assistance does not include gifts from family or friends. In other words, gifts that are recurring and otherwise do not meet the criteria for the income exclusion for gifts would be counted as income under the final rule, regardless of whether the recipient of the gift is a student.
- Clarifying that the final rule excludes from income insurance payments, settlements for personal or property losses, and recoveries from civil actions or settlements based on claims of malpractice, negligence, or other breach of duty owed to a family member arising out of law that resulted in a

member of the family becoming a family member with a disability.

- Section 104 of HOTMA, which amended Section 16 of the 1937 Act, excluded irrevocable trusts and trust funds that are not under the control of the family or household from being considered part of a family's net family assets.
- HUD is clarifying 24 CFR § 5.609(b)(2) to exclude from a family's income any distributions of a trust's principal, regardless of the form of the trust, because this is not income for the family.
- Clarifying that revocable trusts under control of the family count as an asset under the definition of "net family assets" in 24 CFR § 5.603. Only trusts that are irrevocable or not under the control of a family or household member are excluded from a family's net family assets. Since revocable trusts under the control of the family or household are considered part of the net family assets, the final rule clarifies at 24 CFR § 5.609(b)(2)(ii) that distributions from these trusts are not used to calculate annual income. Instead, HACCC must count all actual returns (e.g., interest earned) from the trust as income or, if the trust has no actual returns and the total value of the combined net family assets exceeds \$50,000 (as that amount is updated for inflation), as imputed returns, as applicable, under 24 CFR § 5.609(a)(2).
- Under the amended 1937 Act, families that have a present ownership interest in, a legal right to reside in, and the legal authority to sell real property that is suitable for occupancy for the family (unless the person is a victim of domestic violence or if the family is offering the property for sale) are not eligible to receive rental assistance. A present ownership interest would include any title to a home, any ownership of membership shares in a cooperative, and any lease or other right to occupy a home or cooperative, all as defined by the State or local laws of the jurisdiction where the property is located.
- This provision would not include the right to purchase title to a residence under a lease-purchase agreement. In addition, the statutory language excludes from net family assets (1) real property for which the family does not have the effective legal authority to sell in the jurisdiction in which the property is located and (2) equity in property for which the family is currently receiving homeownership assistance through the HCV program from a PHA.
- Amended the list of units not dependent on the Site-based waiting lists for PBV properties and occupied by referrals from the Coordinated Entry System for homeless set-aside units.
- Added language regarding the Emergency Housing Voucher Program and administration of the vouchers.

A complete copy of the proposed annual PHA Plan, Administrative Plan and ACOP are available for review on the HACCC's website: www.contracostahousing.org <<http://www.contracostahousing.org>>.

Attached to this Board Order are the HUD-required documents for submission.

FISCAL IMPACT:

No direct financial impact.

CONSEQUENCE OF NEGATIVE ACTION:

Should the Board of Commissioners elect not to approve the FY2024 annual PHA Plan, HACCC will be out of compliance with HUD requirements and may not receive any funding via HUD's Capital Fund program until the annual PHA Plan has been submitted to, and approved by, HUD. HUD may also impose additional sanctions beyond the withholding of Capital Funds.

Annual PHA Plan <i>(Standard PHAs and Troubled PHAs)</i>	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires: 03/31/2024
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Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA’s operations, programs, and services, including changes to these policies, and informs HUD, families served by the PHA, and members of the public of the PHA’s mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families.

Applicability. The Form HUD-50075-ST is to be completed annually by **STANDARD PHAs or TROUBLED PHAs**. PHAs that meet the definition of a High Performer PHA, Small PHA, HCV-Only PHA or Qualified PHA do not need to submit this form.

Definitions.

- (1) **High-Performer PHA** – A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers, and was designated as a high performer on both the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAP) assessments if administering both programs, or PHAS if only administering public housing.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP troubled, that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceed 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAP assessment and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550, and that was designated as a standard performer in the most recent PHAS or SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined and is not PHAS or SEMAP troubled.

A.	PHA Information.																																
A.1	<p> PHA Name: Housing Authority of the County of Contra Costa _____ PHA Code: CA011 PHA Type: <input checked="" type="checkbox"/> Standard PHA <input type="checkbox"/> Troubled PHA PHA Plan for Fiscal Year Beginning: (MM/YYYY): 04/2024 PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) Number of Public Housing (PH) Units 953 Number of Housing Choice Vouchers (HCVs) 9591 Total Combined Units/Vouchers 10,544 PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission </p> <p> Availability of Information. PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council a copy of their PHA Plans. </p> <p> <input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below) </p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th rowspan="2" style="width: 25%;">Participating PHAs</th> <th rowspan="2" style="width: 10%;">PHA Code</th> <th rowspan="2" style="width: 25%;">Program(s) in the Consortia</th> <th rowspan="2" style="width: 15%;">Program(s) not in the Consortia</th> <th colspan="2" style="width: 25%;">No. of Units in Each Program</th> </tr> <tr> <th style="width: 12.5%;">PH</th> <th style="width: 12.5%;">HCV</th> </tr> </thead> <tbody> <tr> <td>Lead PHA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td> </td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td> </td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td> </td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV	Lead PHA:																							
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B.	Plan Elements
B.1	<p>Revision of Existing PHA Plan Elements.</p> <p>(a) Have the following PHA Plan elements been revised by the PHA?</p> <p>Y N</p> <p>X <input type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs</p> <p>X <input type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.</p> <p><input type="checkbox"/> <input type="checkbox"/> Financial Resources.</p> <p>X <input type="checkbox"/> Rent Determination. (Flat rent)</p> <p><input type="checkbox"/> <input type="checkbox"/> Operation and Management.</p> <p>X <input type="checkbox"/> Grievance Procedures.</p> <p>X <input type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input type="checkbox"/> Community Service and Self-Sufficiency Programs.</p> <p><input type="checkbox"/> <input type="checkbox"/> Safety and Crime Prevention.</p> <p><input type="checkbox"/> <input type="checkbox"/> Pet Policy.</p> <p><input type="checkbox"/> <input type="checkbox"/> Asset Management.</p> <p><input type="checkbox"/> <input type="checkbox"/> Substantial Deviation.</p> <p>X <input type="checkbox"/> Significant Amendment/Modification</p> <p>(b) If the PHA answered yes for any element, describe the revisions for each revised element(s): See attachment B.1</p> <p>(c) The PHA must submit its Deconcentration Policy for Field Office review.</p>
B.2	<p>New Activities.</p> <p>(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N</p> <p><input type="checkbox"/> <input type="checkbox"/> Hope VI or Choice Neighborhoods.</p> <p>X <input type="checkbox"/> Mixed Finance Modernization or Development.</p> <p>X <input type="checkbox"/> Demolition and/or Disposition.</p> <p><input type="checkbox"/> <input type="checkbox"/> Designated Housing for Elderly and/or Disabled Families.</p> <p><input type="checkbox"/> <input type="checkbox"/> Conversion of Public Housing to Tenant-Based Assistance.</p> <p><input type="checkbox"/> <input type="checkbox"/> Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD.</p> <p><input type="checkbox"/> <input type="checkbox"/> Occupancy by Over-Income Families.</p> <p><input type="checkbox"/> <input type="checkbox"/> Occupancy by Police Officers.</p> <p><input type="checkbox"/> <input type="checkbox"/> Non-Smoking Policies.</p> <p>X <input type="checkbox"/> Project-Based Vouchers.</p> <p><input type="checkbox"/> <input type="checkbox"/> Units with Approved Vacancies for Modernization.</p> <p>X <input type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>See attachment B.2</p> <p>(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan.</p>
B.3	<p>Progress Report.</p> <p>Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.</p> <p>See attachment B.3</p>

<p>B.4</p>	<p>Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.</p> <p>See attachment B.4</p>
<p>B.5</p>	<p>Most Recent Fiscal Year Audit.</p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y N <input type="checkbox"/> X</p> <p>(b) If yes, please describe:</p>
<p>C. Other Document and/or Certification Requirements.</p>	
<p>C.1</p>	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y N X <input type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations. See attachment C.1</p>
<p>C.2</p>	<p>Certification by State or Local Officials.</p> <p>Form HUD 50077-SL, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
<p>C.3</p>	<p>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</p> <p>Form HUD-50077-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
<p>C.4</p>	<p>Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA’s response to the public.</p> <p>(a) Did the public challenge any elements of the Plan?</p> <p>Y N <input type="checkbox"/> X</p> <p>If yes, include Challenged Elements.</p>
<p>C.5</p>	<p>Troubled PHA.</p> <p>(a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place?</p> <p>Y N N/A <input type="checkbox"/> X <input type="checkbox"/></p> <p>(b) If yes, please describe:</p>

D.	Affirmatively Furthering Fair Housing (AFFH).						
D.1	<p>Affirmatively Furthering Fair Housing (AFFH).</p> <p>Provide a statement of the PHA’s strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.</p> <table border="1" data-bbox="181 663 1455 1312"> <tr> <td data-bbox="181 663 1455 703">Fair Housing Goal:</td> </tr> <tr> <td data-bbox="181 703 1455 739"><i>Describe fair housing strategies and actions to achieve the goal</i></td> </tr> <tr> <td data-bbox="181 739 1455 1312"> <ol style="list-style-type: none"> 1. Reduce discriminatory barriers to residential mobility. <ol style="list-style-type: none"> i. Work to ban discrimination in housing on the basis of source of income, including receipt of a Housing Choice Voucher, in the unincorporated areas of the County and in the Cities of Antioch, Concord, Pittsburg, and Walnut Creek. Develop and disseminate a model ordinance for adoption by other municipalities throughout the County. ii. Encourage local block grants or other funding for a security deposit fund to incentivize landlords to rent to voucher holders. </td> </tr> </table> <table border="1" data-bbox="181 1335 1455 1749"> <tr> <td data-bbox="181 1335 1455 1375">Fair Housing Goal:</td> </tr> <tr> <td data-bbox="181 1375 1455 1411"><i>Describe fair housing strategies and actions to achieve the goal</i></td> </tr> <tr> <td data-bbox="181 1411 1455 1749"> <ol style="list-style-type: none"> 2. Increase residential racial and ethnic integration by increasing the supply of affirmatively marketed affordable housing for families in high opportunity areas. <ol style="list-style-type: none"> i. Target use of Project-Based Vouchers and RAD transfers of assistance in designated opportunity areas with low poverty rates, healthy neighborhoods, and high-performing schools. ii. Explore pooling of Project-Based Vouchers across Contra Costa County </td> </tr> </table>	Fair Housing Goal:	<i>Describe fair housing strategies and actions to achieve the goal</i>	<ol style="list-style-type: none"> 1. Reduce discriminatory barriers to residential mobility. <ol style="list-style-type: none"> i. Work to ban discrimination in housing on the basis of source of income, including receipt of a Housing Choice Voucher, in the unincorporated areas of the County and in the Cities of Antioch, Concord, Pittsburg, and Walnut Creek. Develop and disseminate a model ordinance for adoption by other municipalities throughout the County. ii. Encourage local block grants or other funding for a security deposit fund to incentivize landlords to rent to voucher holders. 	Fair Housing Goal:	<i>Describe fair housing strategies and actions to achieve the goal</i>	<ol style="list-style-type: none"> 2. Increase residential racial and ethnic integration by increasing the supply of affirmatively marketed affordable housing for families in high opportunity areas. <ol style="list-style-type: none"> i. Target use of Project-Based Vouchers and RAD transfers of assistance in designated opportunity areas with low poverty rates, healthy neighborhoods, and high-performing schools. ii. Explore pooling of Project-Based Vouchers across Contra Costa County
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Fair Housing Goal:

Describe fair housing strategies and actions to achieve the goal

3. **Increase and stabilize access to proficient schools**
 - i. **Create regular lines of communications between housing boards and staff with county and district school boards and school district staff to ensure that districts take into account the needs of low income residents in redistricting and investment decisions, particularly for residents of public and assisted housing in the region.**
 - ii. **To the extent possible, focus the development of new family affordable housing in school districts and school zones with lower rates of school-based poverty concentration (and require new market rate multifamily development in high performing school zones to include larger affordable apartments for families with children**

Instructions for Preparation of Form HUD-50075-ST Annual PHA Plan for Standard and Troubled PHAs

A. PHA Information. All PHAs must complete this section. (24 CFR §903.4)

A.1 Include the full **PHA Name, PHA Code, PHA Type, PHA Fiscal Year Beginning (MM/YYYY), PHA Inventory, Number of Public Housing Units and or Housing Choice Vouchers (HCVs), PHA Plan Submission Type,** and the **Availability of Information,** specific location(s) of all information relevant to the public hearing and proposed PHA Plan. ([24 CFR §903.23\(4\)\(e\)](#))

PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table. ([24 CFR §943.128\(a\)](#))

B. Plan Elements. All PHAs must complete this section.

B.1 Revision of Existing PHA Plan Elements. PHAs must:

Identify specifically which plan elements listed below that have been revised by the PHA. To specify which elements have been revised, mark the “yes” box. If an element has not been revised, mark “no.” ([24 CFR §903.7](#))

Statement of Housing Needs and Strategy for Addressing Housing Needs. Provide a statement addressing the housing needs of low-income, very low-income and extremely low-income families and a brief description of the PHA’s strategy for addressing the housing needs of families who reside in the jurisdiction served by the PHA and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The statement must identify the housing needs of (i) families with incomes below 30 percent of area median income (extremely low-income); (ii) elderly families (iii)

households with individuals with disabilities, and households of various races and ethnic groups residing in the jurisdiction or on the public housing and Section 8 tenant-based assistance waiting lists based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data. The statement of housing needs shall be based on information provided by the applicable Consolidated Plan, information provided by HUD, and generally available data. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. Once the PHA has submitted an Assessment of Fair Housing (AFH), which includes an assessment of disproportionate housing needs in accordance with 24 CFR §5.154(d)(2)(iv), information on households with individuals with disabilities and households of various races and ethnic groups residing in the jurisdiction or on the waiting lists no longer needs to be included in the Statement of Housing Needs and Strategy for Addressing Housing Needs. (24 CFR §903.7(a)).

The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. (24 CFR §903.7(a)(2)(i)) Provide a description of the ways in which the PHA intends, to the maximum extent practicable, to address those housing needs in the upcoming year and the PHA's reasons for choosing its strategy. (24 CFR §903.7(a)(2)(ii))

Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions. PHAs must submit a Deconcentration Policy for Field Office review. For additional guidance on what a PHA must do to deconcentrate poverty in its development and comply with fair housing requirements, see [24 CFR 903.2](#). (24 CFR §903.23(b)) Describe the PHA's admissions policy for deconcentration of poverty and income mixing of lower-income families in public housing. The Deconcentration Policy must describe the PHA's policy for bringing higher income tenants into lower income developments and lower income tenants into higher income developments. The deconcentration requirements apply to general occupancy and family public housing developments. Refer to 24 CFR §903.2(b)(2) for developments not subject to deconcentration of poverty and income mixing requirements. (24 CFR §903.7(b)) Describe the PHA's procedures for maintain waiting lists for admission to public housing and address any site-based waiting lists. (24 CFR §903.7(b)). A statement of the PHA's policies that govern resident or tenant eligibility, selection and admission including admission preferences for both public housing and HCV. (24 CFR §903.7(b)) Describe the unit assignment policies for public housing. (24 CFR §903.7(b))

Financial Resources. A statement of financial resources, including a listing by general categories, of the PHA's anticipated resources, such as PHA operating, capital and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support public housing or tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources. (24 CFR §903.7(c))

Rent Determination. A statement of the policies of the PHA governing rents charged for public housing and HCV dwelling units, including applicable public housing flat rents, minimum rents, voucher family rent contributions, and payment standard policies. (24 CFR §903.7(d))

Operation and Management. A statement of the rules, standards, and policies of the PHA governing maintenance and management of housing owned, assisted, or operated by the public housing agency (which shall include measures necessary for the prevention or eradication of pest infestation, including cockroaches), and management of the PHA and programs of the PHA. (24 CFR §903.7(e))

Grievance Procedures. A description of the grievance and informal hearing and review procedures that the PHA makes available to its residents and applicants. (24 CFR §903.7(f))

Homeownership Programs. A description of any Section 5h, Section 32, Section 8y, or HOPE I public housing or Housing Choice Voucher (HCV) homeownership programs (including project number and unit count) administered by the agency or for which the PHA has applied or will apply for approval. (24 CFR §903.7(k))

Community Service and Self Sufficiency Programs. Describe how the PHA will comply with the requirements of (24 CFR §903.7(l)). Provide a description of: **1)** Any programs relating to services and amenities provided or offered to assisted families; and **2)** Any policies or programs of the PHA for the enhancement of the economic and social self-sufficiency of assisted families, including programs subject to Section 3 of the Housing and Urban Development Act of 1968 (24 CFR Part 135) and FSS. (24 CFR §903.7(l))

Safety and Crime Prevention (VAWA). Describe the PHA's plan for safety and crime prevention to ensure the safety of the public housing residents. The statement must provide development-by-development or jurisdiction wide-basis: (i) A description of the need for measures to ensure the safety of public housing residents; (ii) A description of any crime prevention activities conducted or to be conducted by the PHA; and (iii) A description of the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities. (24 CFR §903.7(m)) A description of: **1)** Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking; **2)** Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing; and **3)** Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families. (24 CFR §903.7(m)(5))

Pet Policy. Describe the PHA's policies and requirements pertaining to the ownership of pets in public housing. (24 CFR §903.7(n))

Asset Management. State how the agency will carry out its asset management functions with respect to the public housing inventory of the agency, including how the agency will plan for the long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs for such inventory. (24 CFR §903.7(q))

Substantial Deviation. PHA must provide its criteria for determining a "substantial deviation" to its 5-Year Plan. (24 CFR §903.7(r)(2)(i))

Significant Amendment/Modification. PHA must provide its criteria for determining a "Significant Amendment or Modification" to its 5-Year and Annual Plan. For modifications resulting from the Rental Assistance Demonstration (RAD) program, refer to the 'Sample PHA Plan Amendment' found in Notice PIH-2012-32 REV-3, successor RAD Implementation Notices, or other RAD Notices.

If any boxes are marked "yes", describe the revision(s) to those element(s) in the space provided.

PHAs must submit a Deconcentration Policy for Field Office review. For additional guidance on what a PHA must do to deconcentrate poverty in its development and comply with fair housing requirements, see [24 CFR 903.2](#). (24 CFR §903.23(b))

B.2 New Activities. If the PHA intends to undertake any new activities related to these elements in the current Fiscal Year, mark “yes” for those elements, and describe the activities to be undertaken in the space provided. If the PHA does not plan to undertake these activities, mark “no.”

HOPE VI or Choice Neighborhoods. 1) A description of any housing (including project number (if known) and unit count) for which the PHA will apply for HOPE VI or Choice Neighborhoods; and 2) A timetable for the submission of applications or proposals. The application and approval process for Hope VI or Choice Neighborhoods is a separate process. See guidance on HUD’s website at:

https://www.hud.gov/program_offices/public_indian_housing/programs/ph/hope6. (Notice PIH 2011-47)

Mixed Finance Modernization or Development. 1) A description of any housing (including project number (if known) and unit count) for which the PHA will apply for Mixed Finance Modernization or Development; and 2) A timetable for the submission of applications or proposals. The application and approval process for Mixed Finance Modernization or Development is a separate process. See guidance on HUD’s website at:

https://www.hud.gov/program_offices/public_indian_housing/programs/ph/hope6/mfph#4

Demolition and/or Disposition. With respect to public housing only, describe any public housing development(s), or portion of a public housing development projects, owned by the PHA and subject to ACCs (including project number and unit numbers [or addresses]), and the number of affected units along with their sizes and accessibility features) for which the PHA will apply or is currently pending for demolition or disposition approval under section 18 of the 1937 Act (42 U.S.C. 1437p); and (2) A timetable for the demolition or disposition. This statement must be submitted to the extent that approved and/or pending demolition and/or disposition has changed as described in the PHA’s last Annual and/or 5-Year PHA Plan submission. The application and approval process for demolition and/or disposition is a separate process. Approval of the PHA Plan does not constitute approval of these activities. See guidance on HUD’s website at: http://www.hud.gov/offices/pih/centers/sac/demo_dispo/index.cfm. (24 CFR §903.7(h))

Designated Housing for Elderly and Disabled Families. Describe any public housing projects owned, assisted or operated by the PHA (or portions thereof), in the upcoming fiscal year, that the PHA has continually operated as, has designated, or will apply for designation for occupancy by elderly and/or disabled families only. Include the following information: 1) development name and number; 2) designation type; 3) application status; 4) date the designation was approved, submitted, or planned for submission, 5) the number of units affected and; 6) expiration date of the designation of any HUD approved plan. **Note:** The application and approval process for such designations is separate from the PHA Plan process, and PHA Plan approval does not constitute HUD approval of any designation. (24 CFR §903.7(i)(C))

Conversion of Public Housing under the Voluntary or Mandatory Conversion programs. Describe any public housing building(s) (including project number and unit count) owned by the PHA that the PHA is required to convert or plans to voluntarily convert to tenant-based assistance; 2) An analysis of the projects or buildings required to be converted; and 3) A statement of the amount of assistance received to be used for rental assistance or other housing assistance in connection with such conversion. See guidance on HUD’s website at:

<http://www.hud.gov/offices/pih/centers/sac/conversion.cfm>. (24 CFR §903.7(j))

Conversion of Public Housing under the Rental Assistance Demonstration (RAD) program. Describe any public housing building(s) (including project number and unit count) owned by the PHA that the PHA plans to voluntarily convert to Project-Based Rental Assistance or Project-Based Vouchers under RAD. See additional guidance on HUD’s website at: [Notice PIH 2012-32 REV-3, successor RAD Implementation Notices, and other RAD notices.](#)

Occupancy by Over-Income Families. A PHA that owns or operates fewer than two hundred fifty (250) public housing units, may lease a unit in a public housing development to an over-income family (a family whose annual income exceeds the limit for a low income family at the time of initial occupancy), if all the following conditions are satisfied: (1) There are no eligible low income families on the PHA waiting list or applying for public housing assistance when the unit is leased to an over-income family; (2) The PHA has publicized availability of the unit for rental to eligible low income families, including publishing public notice of such availability in a newspaper of general circulation in the jurisdiction at least thirty days before offering the unit to an over-income family; (3) The over-income family rents the unit on a month-to-month basis for a rent that is not less than the PHA’s cost to operate the unit; (4) The lease to the over-income family provides that the family agrees to vacate the unit when needed for rental to an eligible family; and (5) The PHA gives the over-income family at least thirty days notice to vacate the unit when the unit is needed for rental to an eligible family. The PHA may incorporate information on occupancy by over-income families into its PHA Plan statement of deconcentration and other policies that govern eligibility, selection, and admissions. See additional guidance on HUD’s website at: [Notice PIH 2011-7.](#) (24 CFR 960.503) (24 CFR 903.7(b))

Occupancy by Police Officers. The PHA may allow police officers who would not otherwise be eligible for occupancy in public housing, to reside in a public housing dwelling unit. The PHA must include the number and location of the units to be occupied by police officers, and the terms and conditions of their tenancies; and a statement that such occupancy is needed to increase security for public housing residents. A “police officer” means a person determined by the PHA to be, during the period of residence of that person in public housing, employed on a full-time basis as a duly licensed professional police officer by a Federal, State or local government or by any agency of these governments. An officer of an accredited police force of a housing agency may qualify. The PHA may incorporate information on occupancy by police officers into its PHA Plan statement of deconcentration and other policies that govern eligibility, selection, and admissions. See additional guidance on HUD’s website at: [Notice PIH 2011-7.](#) (24 CFR 960.505) (24 CFR 903.7(b))

Non-Smoking Policies. The PHA may implement non-smoking policies in its public housing program and incorporate this into its PHA Plan statement of operation and management and the rules and standards that will apply to its projects. See additional guidance on HUD’s website at: [Notice PIH 2009-21 and Notice PIH-2017-03.](#) (24 CFR §903.7(e))

Project-Based Vouchers. Describe any plans to use Housing Choice Vouchers (HCVs) for new project-based vouchers, which must comply with PBV goals, civil rights requirements, Housing Quality Standards (HQS) and deconcentration standards, as stated in 983.57(b)(1) and set forth in the PHA Plan statement of deconcentration and other policies that govern eligibility, selection, and admissions. If using project-based vouchers, provide the projected number of project-based units and general locations, and describe how project-basing would be consistent with the PHA Plan (24 CFR §903.7(b)).

Units with Approved Vacancies for Modernization. The PHA must include a statement related to units with approved vacancies that are undergoing modernization in accordance with [24 CFR §990.145\(a\)\(1\).](#)

Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).

For all activities that the PHA plans to undertake in the current Fiscal Year, provide a description of the activity in the space provided.

- B.3 Progress Report.** For all Annual Plans following submission of the first Annual Plan, a PHA must include a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year PHA Plan. [\(24 CFR §903.7\(r\)\(1\)\)](#)
- B.4 Capital Improvements.** PHAs that receive funding from the Capital Fund Program (CFP) must complete this section [\(24 CFR §903.7 \(g\)\)](#). To comply with this requirement, the PHA must reference the most recent HUD approved Capital Fund 5 Year Action Plan in EPIC and the date that it was approved. PHAs can reference the form by including the following language in the Capital Improvement section of the appropriate Annual or Streamlined PHA Plan Template: “See Capital Fund 5 Year Action Plan in EPIC approved by HUD on XX/XX/XXXX.”
- B.5 Most Recent Fiscal Year Audit.** If the results of the most recent fiscal year audit for the PHA included any findings, mark “yes” and describe those findings in the space provided. [\(24 CFR §903.7\(p\)\)](#)

C. Other Document and/or Certification Requirements.

- C.1 Resident Advisory Board (RAB) comments.** If the RAB had comments on the annual plan, mark “yes,” submit the comments as an attachment to the Plan and describe the analysis of the comments and the PHA’s decision made on these recommendations. [\(24 CFR §903.13\(c\), 24 CFR §903.19\)](#)
- C.2 Certification by State of Local Officials.** Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan. [\(24 CFR §903.15\)](#). Note: A PHA may request to change its fiscal year to better coordinate its planning with planning done under the Consolidated Plan process by State or local officials as applicable.
- C.3 Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.** Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed*. Form HUD-50077-ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed* must be submitted by the PHA as an electronic attachment to the PHA Plan. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the certification requirement to affirmatively further fair housing if the PHA fulfills the requirements of §§ 903.7(o)(1) and 903.15(d) and: (i) examines its programs or proposed programs; (ii) identifies any fair housing issues and contributing factors within those programs, in accordance with 24 CFR 5.154 or 24 CFR 5.160(a)(3) as applicable; (iii) specifies actions and strategies designed to address contributing factors, related fair housing issues, and goals in the applicable Assessment of Fair Housing consistent with 24 CFR 5.154 in a reasonable manner in view of the resources available; (iv) works with jurisdictions to implement any of the jurisdiction’s initiatives to affirmatively further fair housing that require the PHA’s involvement; (v) operates programs in a manner consistent with any applicable consolidated plan under 24 CFR part 91, and with any order or agreement, to comply with the authorities specified in paragraph (o)(1) of this section; (vi) complies with any contribution or consultation requirement with respect to any applicable AFH, in accordance with 24 CFR 5.150 through 5.180; (vii) maintains records reflecting these analyses, actions, and the results of these actions; and (viii) takes steps acceptable to HUD to remedy known fair housing or civil rights violations, impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction’s initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. [\(24 CFR §903.7\(o\)\)](#).
- C.4 Challenged Elements.** If any element of the Annual PHA Plan or 5-Year PHA Plan is challenged, a PHA must include such information as an attachment to the Annual PHA Plan or 5-Year PHA Plan with a description of any challenges to Plan elements, the source of the challenge, and the PHA’s response to the public.
- C.5 Troubled PHA.** If the PHA is designated troubled, and has a current MOA, improvement plan, or recovery plan in place, mark “yes,” and describe that plan. Include dates in the description and most recent revisions of these documents as attachments. If the PHA is troubled, but does not have any of these items, mark “no.” If the PHA is not troubled, mark “N/A.” [\(24 CFR §903.9\)](#)

D. Affirmatively Furthering Fair Housing (AFFH).

D.1 Affirmatively Furthering Fair Housing. The PHA will use the answer blocks in item D.1 to provide a statement of its strategies and actions to implement each fair housing goal outlined in its accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5) that states, in relevant part: “To implement goals and priorities in an AFH, strategies and actions shall be included in program participants’ ... PHA Plans (including any plans incorporated therein) Strategies and actions must affirmatively further fair housing” Use the chart provided to specify each fair housing goal from the PHA’s AFH for which the PHA is the responsible program participant – whether the AFH was prepared solely by the PHA, jointly with one or more other PHAs, or in collaboration with a state or local jurisdiction – and specify the fair housing strategies and actions to be implemented by the PHA during the period covered by this PHA Plan. If there are more than three fair housing goals, add answer blocks as necessary.

Until such time as the PHA is required to submit an AFH, the PHA will not have to complete section D., nevertheless, the PHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015, which means that it examines its own programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction’s initiatives to affirmatively further fair housing that require the PHA’s involvement; and maintain records reflecting these analyses and actions. Furthermore, under Section 5A(d)(15) of the U.S. Housing Act of 1937, as amended, a PHA must submit a civil rights certification with its Annual PHA Plan, which is described at 24 CFR 903.7(o)(1) except for qualified PHAs who submit the Form HUD-50077-CR as a standalone document.

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year and Annual PHA Plan.

Public reporting burden for this information collection is estimated to average 7.52 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.

Attachment B.1

Summary of December 2023, (Admissions and Continued Occupancy Policy) ACOP

In addition to numerous grammatical changes, edits were made to the standard HUD language in the plan that introduces the subject matter. These are not policy changes but regulatory edits from the Code of Federal Regulations. The following substantial changes were made to the Admissions and Continued Occupancy Policy (ACOP) as it pertains to HACCC Policy:

- Updates throughout the ACOP to reflect new definitions under VAWA and include “human trafficking”.
 - Although the VAWA 2022 statute does not specifically include human trafficking in the list of victims protected under VAWA, in 2022 HUD began including human trafficking as part of the list of victims protected under VAWA (as seen in Notices PIH 2022-06, PIH 2022-22, and PIH 2022-24). In the absence of a final rule implementing VAWA 2022 and to mirror HUD’s recent usage, this policy includes human trafficking in addition to domestic violence, dating violence, sexual assault, and stalking anywhere such a list appears.
- Chapter 2: Fair Housing
 - updates regarding Discrimination Complaints under the Equal Access Final rule [Notice PIH 2014-20]
 - Notice PIH 2014-20 requires an articulated complaint process for allegations of discrimination under the Equal Access Final rule. The Equal Access Final Rule requires that PHAs provide equal access regardless of marital status, gender identity, or sexual orientation. The PHA will be informed of these obligations by the HUD Field Office or FHEO when an Equal Access complaint investigation begins.
 - VAWA Complaint Processing [Notice FHEO 2023-01].
 - A complainant may, not later than one year after an alleged VAWA violation has occurred or terminated, file a complaint with FHEO alleging such violation. If there is a violation that began prior to a year before the complaint is filed, but it continues into the one-year period, HUD will accept the complaint. FHEO will investigate the complaint if it is timely and FHEO otherwise has jurisdiction. If a complaint is filed more than one year after the alleged violation

occurred or terminated, FHEO may, but is not required to, investigate the allegations under the additional authority and procedures described in FHEO 2023-01.

- Chapter 6: Income
 - updates to language relating to the temporary hardship paragraph suspending the minimum rent for the 90-day period beginning the first month following the date the family's request for a hardship exemption. After the 90-day suspension period, the family must resume payment of the minimum rent and must repay the HA the amounts suspended. HUD requires the PHA to offer a reasonable payment agreement, on terms and conditions established by the PHA.
- Chapter 8: Leasing
 - Changes to the terms of the lease to include if the family is determined to be over income for 24 consecutive months.
 - Grammatical changes to the section relating to the smoke-free policy under exhibit 8-1: Smoke-free policy.
- Chapter 9: Reexamination
 - Addition of language in reference to over-income families and non-public housing over income families.
- Chapter 11: Community Service
 - Add language that a member of a non-public housing over-income family is exempt from community service.
- Chapter 13: Lease Termination
 - Addition of language in reference to over-income families and non-public housing over income families.
 - Updates to language regarding VAWA Protections against Terminations paragraph & in Limits on VAWA Protections paragraph.
 - Although the VAWA 2022 statute does not specifically include human trafficking in the list of victims protected under VAWA, in 2022 HUD began including human trafficking as part of the list of victims protected under VAWA (as seen in Notices PIH 2022-06, PIH 2022-22, and PIH 2022-24). In the absence of a final rule implementing VAWA 2022 and to mirror HUD's recent usage, this policy includes human trafficking in addition to domestic violence, dating violence, sexual assault, and stalking anywhere such a list appears.
 - PHAs and owners may not coerce, intimidate, threaten, interfere with, or retaliate against any person who exercises or assists or encourages a person to exercise any rights or protections under VAWA [FR Notice 1/4/23].

- Chapter 14: Grievances
 - Changes in the language of the grievance procedure process and definitions updates:
 - Public housing tenants have the right to request a grievance hearing for any PHA action or failure to act in accordance with the tenant's lease.
 - Grievance procedures do not apply in the following circumstances:
 - Disputes between tenants not involving the PHA or class grievances [24 CFR 966.51(b)].
 - The grievance procedure is not intended as a forum for initiating or negotiating policy changes between a group or groups of tenants and the PHA's Board of Commissioners [24 CFR 966.51(b)].
 - When the PHA is in a HUD-declared due process state, HUD allows the PHA to exclude from the PHA grievance procedure any grievance concerning a termination of tenancy or eviction that involves:
 - Any criminal activity that threatens the health, safety or right to peaceful enjoyment of the premises of other residents or employees of the PHA; or
 - Any violent or drug-related criminal activity on or off such premises; or
 - Any criminal activity that resulted in felony conviction of a household member [24 CFR 966.51(a)(2)].
 - Tenant: The adult person (or persons other than a live-in aide) who resides in the unit and who executed the lease with the PHA as lessee of the dwelling unit, or if no such person now resides in the unit, the person who resides in the unit and is the remaining head of the household of the tenant family residing in the dwelling unit.
 - Resident organization: An organization of residents, which also may include a resident management corporation.
 - The Grievance Procedure [24 CFR 966.51]
 - The grievance procedure is included by reference in all tenant dwelling leases and will be furnished to each tenant and all resident organizations [24 CFR 966.52 (b) and (d)].
 - Any changes proposed in this grievance procedure must provide for at least 30 days' notice to tenants and resident organizations, explaining the proposed changes and providing an opportunity to present written comments. Comments will be considered by the

PHA before any revisions are made to the grievance procedure [24 CFR 966.52(c)].

- Informal settlement of a grievance [24 CFR 966.54]
 - Any grievance request must be personally presented, either orally or in writing (including email), to the PHA's central office or the management office of the development in which the tenant resides within 10 days after the violation.
 - As soon as the grievance request is received, it will be reviewed by the PHA to ensure it meets the requirements for a grievance hearing. If the tenant is not entitled to a grievance, the PHA will notify the tenant that they may instead seek judicial review and the procedures for requesting such a review [24 CFR 966.4(l)(3)(i)(C)(v)(B)].
 - Otherwise, within 15 business days, the tenant will be contacted to arrange a mutually convenient time to meet so the grievance may be discussed and settled without a hearing. At the informal settlement, the tenant will present their grievance.
 - Within fifteen business days following the informal settlement, the PHA will prepare and either hand deliver, mail, or email to the tenant a summary of the discussion. The summary will specify the names of the participants; the date of the meeting; the nature of the proposed resolution of the complaint, with specific reason(s); and will specify the procedures by which a formal hearing under this procedure may be obtained if the tenant is not satisfied [24 CFR 966.54]. A copy of this summary will also be placed in the tenant's file.
- Requesting a formal grievance hearing
 - If the tenant is not satisfied with the outcome of the informal settlement, the tenant must submit a written request for a hearing to the management office of the development where the tenant lives no later than five business days after receiving the summary of the informal settlement.
 - The written request must specify the reasons for the request and the action or relief sought from the PHA.
- Chapter 16: Program Administration – changes in the following definitions:
 - The term *domestic violence* includes felony or misdemeanor crimes committed by a current or former spouse or intimate partner of the victim under the family or domestic violence laws of the jurisdiction receiving grant funding, and in the case of victim services, includes the use or attempted use of physical abuse or sexual abuse, or a pattern of any other

coercive behavior committed, enabled, or solicited to gain or maintain power and control over a victim, including verbal, psychological, economic, or technological abuse that may or may not constitute criminal behavior, by a person who is:

- The current or former spouse or intimate partner of the victim, or person similarly situated to a spouse or intimate partner of the victim.
 - A person who is cohabitating or has cohabitated with the victim as a spouse or intimate partner.
 - A person with whom the victim shares a child in common.
 - A person who commits acts against a youth or adult victim who is protected from those acts under the domestic or family violence laws of the jurisdiction
- The term *economic abuse* means behavior that is coercive, deceptive, or unreasonably controls or restrains a person's ability to acquire, use, or maintain economic resources to which they are entitled, including using coercion, fraud, and manipulation to:
- Restrict a person's access to money, assets, credit, or financial information.
 - Unfairly use a person's personal economic resources, including money, assets, and credit, for one's own advantage.
 - Exert undue influence over a person's financial and economic behavior or decisions, including forcing default on joint or other financial obligations, exploiting powers of attorney, guardianship, or conservatorship, or to whom one has a fiduciary duty.
- The term *technological abuse* means an act or pattern of behavior that occurs within domestic violence, dating violence, sexual assault, or stalking and is intended to harm, threaten, intimidate, control, stalk, harass, impersonate, exploit, extort, or monitor another person, except as otherwise permitted by law, that occurs using any form of technology, including but not limited to:
- Internet enabled devices
 - Online spaces and platforms
 - Computers
 - Mobile devices
 - Cameras and imaging programs
 - Apps
 - Location tracking devices
 - Communication technologies
 - Any other emergency technologies

- Glossary – Changes to acronyms and definitions
 - **VAWA.** Violence Against Women Act
 - **Alternative non-public housing rent.** A monthly rent equal to the greater of:
 - The applicable fair market rent, as defined in 24 CFR part 888, subpart A, for the unit; or
 - The amount of the monthly subsidy provided for the unit, which will be determined by adding the per unit assistance provided to a public housing property as calculated through the applicable formulas for the Public Housing Capital Fund and Public Housing Operating Fund.
 - **Domestic violence.** Felony or misdemeanor crimes of violence committed by a current or former spouse or intimate partner of the victim under the family or domestic violence laws of the jurisdiction receiving grant funding, and in the case of victim services, includes the user or attempted use of physical abuse or sexual abuse, or a pattern of any other coercive behavior committed, enabled, or solicited to gain or maintain power and control over a victim, including verbal, psychological, economic, or technological abuse that may or may not constitute criminal behavior, by a person who is:
 - The current or former spouse or intimate partner of the victim, or person similarly situated to a spouse or intimate partner of the victim.
 - A person who is cohabitating or has cohabitated with the victim as a spouse or intimate partner.
 - A person with whom the victim shares a child in common.
 - A person who commits acts against a youth or adult victim who is protected from those acts under the domestic or family violence laws of the jurisdiction.
 - **Economic abuse.** Behavior that is coercive, deceptive, or unreasonably controls or restrains a person’s ability to acquire, use, or maintain economic resources to which they are entitled, including using coercion, fraud, and manipulation to:
 - Restrict a person’s access to money, assets, credit, or financial information.
 - Unfairly use a person’s personal economic resources, including money, assets, and credit, for one’s own advantage.
 - Exert undue influence over a person’s financial and economic behavior or decisions, including forcing default on joint or other

financial obligations, exploiting powers of attorney, guardianship, or conservatorship, or to whom one has a fiduciary duty.

- **Flat rent.** Rent that is based on the market rent charged for comparable units in the private unassisted rental market, set at no less than 85 percent of the current fair market rent (FMR), 85 percent of the small area fair market rent (SAFMR), or 85 percent of the unadjusted rent, with utility allowances applied as necessary. The unadjusted rent is the FMR estimated directly from source data that HUD uses to calculate FMRs in nonmetropolitan.
- **Human trafficking.** A crime involving the exploitation of a person for labor, services, or commercial sex. The Trafficking Victims Protection Act of 2000 and its subsequent reauthorizations recognize and define two primary forms of human trafficking:
 - Sex trafficking is the recruitment, harboring, transportation, provision, obtaining, patronizing, or soliciting of a person for the purpose of a commercial sex act in which a commercial sex act is induced by force, fraud, or coercion, or in which the person induced to perform such act has not attained 18 years of age. See 22 U.S.C. § 7102(11)(A).
 - Forced labor is the recruitment, harboring, transportation, provision, or obtaining of a person for labor or services, through the use of force, fraud, or coercion for the purpose of subjection to involuntary servitude, peonage, debt bondage, or slavery. See 22 U.S.C. § 7102(11)(B).
- **Non-public housing over-income family.** A family whose income exceeds the over-income limit for 24 consecutive months and is paying the alternative non-public housing rent.
- **Over-income family.** A family whose income exceeds the over-income limit.
- **Over-income limit.** The over-income limit is determined by multiplying the applicable income limit for a very low-income family, as defined in 24 CFR 5.603(b), by a factor of 2.4.
- **Technological abuse.** An act or pattern of behavior that occurs within domestic violence, dating violence, sexual assault, or stalking and is intended to harm, threaten, intimidate, control, stalk, harass, impersonate, exploit, extort, or monitor another person, except as otherwise permitted by law, that occurs using any form of technology, including but not limited to:
 - Internet enabled devices
 - Online spaces and platforms

- Computers
- Mobile devices
- Cameras and imaging programs
- Apps
- Location tracking devices
- Communication technologies
- Any other emergency technologies

Attachment B.1.

Summary of December, 2023 Administrative Plan Changes

In addition to numerous grammatical changes, edits were made to the standard HUD language in the plan that introduces specific subject matter. These are not policy changes but regulatory edits from the Code of Federal Regulations. The following proposed substantial changes were made to the Housing Choice Voucher Program Administrative Plan as it pertains to HACCC Policy:

- Language was added to specify that Fair Housing complaints that impede fair housing choice will be reported not only to the State's Fair Housing and Equal Employment Office but also to the Department of Conservation and Development of Contra Costa County who is responsible for the Consolidated Plan.
- Clarified the Lifetime Registration ban for sex offenders to state that only Tier 3 and 4 registrants are banned from participation in Federally assisted programs.
- Families with Net Family Assets of more than \$100,000 and/or the family has a present ownership interest in, a legal right to reside in, and the effective legal authority to sell the real property (based on laws of the state or locality in which the property is located) that is suitable for occupancy by the family as a residence will not be eligible to continue to receive rental assistance and will be terminated from program participation. HACCC shall provide a grace period of six months from the effective date of the Annual or Interim Reexamination within which the assisted family may cure the noncompliance with the Net Asset threshold.
- Additions to the HCV wait list that are formalities for 3rd part referrals for special funding sources such as Mainstream, Family Unification/Foster Youth Initiative, VASH, Stability Vouchers, Emergency Housing Vouchers, or other similar funding sources that involve third-party agencies such as Health, Housing and Homeless Services or Employment and Human Services, etc., will not require public notice as indicated above for broad outreach waiting list efforts.
- Added new HUD Stability Vouchers to the list of Special Purpose funding HACCC receives.
- Added a newly funded program that is a subsidiary of the Family Unification Program called the Foster Youth to Independence Initiative (FYI). In addition to the program, a preference was added to ensure that referred FYI applicants are streamlined to the top of the wait list for immediate housing.
- HOTMA removed the statutory authority for EID, so HUD cannot retain the disallowance once the statutory change is in effect, which will be upon the

effective date of this final rule. However, if a family is receiving a disallowance of increase in annual income in accordance with §§ 5.617(c) and 960.255(b) on this final rule's effective date, participants should be able to benefit from EID for the full 24 months. EID will be available only to families that are eligible for and participating in the program on the effective date of the final rule; no new families may be added.

- Under § 5.618(b)(1), when all net family assets have a combined value of \$50,000 or less, the family is to include on its self- certification that the combined value of net family assets do not exceed \$50,000, and the family expects to receive interest from the family's assets. This amount is to be included in the family's income. The PHA or owner may rely on this self- certification to serve as verification for both assets and the amount of actual income the family expects to receive from such assets.
- HACCC must calculate the imputed return on the combined value of all net family assets when the net family assets are more than \$50,000 if no actual income can be computed from any of the net family assets.
- Updated the deduction for an elderly or disabled family member from \$400 per household to \$525 per household subject to annual adjustments by HUD.
- Specifies that the inflationary index for all necessary adjustments will be based on the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W). , annual inflationary adjustments will be established by rounding to the nearest dollar except that annual inflationary adjustments for the dependent deduction (§ 5.611(a)(1)) and the elderly or disabled family deduction ((§ 5.611(a)(2)) will be rounded to the next lowest multiple of \$25.
- HUD expects to make the revised amounts effective January 1st of each year for the following requirements in accordance with the inflationary adjustments covered by this final rule: the value cap on net family asset cap for imputing returns (§ 5.609(a)(2) and (b)(1)); the mandatory deduction for elderly and disabled families (§ 5.611(a)(2)); the restriction on the net family assets (§§ 5.618(a)(1)(i), 574.310(f)); the amount of net assets the PHA or owner may determine based on a certification by the family (§§ 5.618(b)(1), 5.659(e), 92.203(e); 93.151(e); 574.310(e)(3)(ii); 960.259(c)(2), and 982.516(a)(3)); and the mandatory deduction for a dependent ((§ 5.611(a)(1)), which is also used to calculate the income exclusion for earned income of dependent students (§ 5.609(b)(14)) and adoption assistance payments (§ 5.609(b)(15)).
- The final rule makes a change from 3 to 10 percent of annual income for the threshold that applies to unreimbursed health and medical care expenses and reasonable attendant care and auxiliary apparatus deductions.

- HUD is creating two ways by which a family may qualify for a health and medical care deductions and reasonable attendant care and auxiliary apparatus expenses hardship. First, a family may qualify for a lower threshold for unreimbursed health and medical care expenses and reasonable attendant care and auxiliary apparatus expenses to be deducted from income if the family, at the time of the effective date of this final rule, is receiving the unreimbursed health and medical care expense and reasonable attendant care and auxiliary apparatus expense deduction at the 3 percent threshold. However, even families not receiving a deduction for health and medical care expenses and reasonable attendant care and auxiliary apparatus expenses at the time that this final rule is effective may still qualify for a hardship exemption if the family is experiencing a change in circumstances that would not otherwise trigger an interim reexamination. Families seeking a hardship exemption in this category must have eligible expenses that exceed 5 percent of the family's annual income to receive the benefit of the hardship exemption. The final rule increased to 5 percent the first year, 7.5 percent the second year, and reaching the new statutory standard of 10 percent in the third year.
- HOTMA amendments do require that HUD, by regulation, specifically provide hardship exemptions when the financial difficulty faced by the family is due to specific circumstances around childcare or health and medical care and reasonable attendant care and auxiliary apparatus expenses. HUD is adding language to the childcare hardship exemption to specify that the resulting alternative adjusted income calculation must remain in place for a period of up to 90 days.
- HUD also revised the language to clarify that the threshold for when a PHA, owner, or grantee must conduct a reexamination due to decreases in a family's income is a change of ten percent or a lower threshold set by the PHA or owner.
- Revised HUD requirements so that the use of EIV is required only at annual reexaminations, and not at interim reexaminations. However, PHAs and owners may use EIV for interim reexaminations if desired.
- If the tenant complies with the interim reporting requirements, the PHA, owner, or grantee must give the tenant 30 days advance notice of any rent increase, and the rent increase will be effective the first of the month commencing after the end of the 30-day period. If the tenant has complied with the interim reporting requirement and the tenant's rent will decrease, the change in rent is effective on the first day of the month after the date of action that caused the interim certification, for example the first of the month after the date of loss of employment. If the tenant does not comply with the interim reporting requirements, and the PHA, owner, or grantee discovers the tenant has failed to report changes as required, the PHA, owner, or grantee must initiate an interim reexamination and implement rent changes as follows: PHAs, owners, or grantees must implement any resulting rent increase retroactive to the first of the

month following the date that the action occurred, and any resulting rent decrease must be implemented no later than the effective date of the first rent period following completion of the reexamination.

- HOTMA amends the 1937 Act so that PHAs and owners may not consider a family's increases of less than 10% in earned income for the purposes of an interim reexamination unless the family had previously undergone an interim reexamination during the year for a decrease in income.
- Amending the Admin Plan language to state that an Interim Reexamination will be conducted when the family's income has increased by 10% or more of annual adjusted income and their share of rent will change because of the increase.
- HUD is modifying the language to exclude "nonrecurring" income received in the previous year that will not be repeated in § 5.609(b)(24). However, earnings as an independent contractor, day laborer, or seasonal worker are explicitly not within the category of excluded income.
- HUD is specifying certain forms of income that are included in the category of "nonrecurring" income that would be excluded from the calculation of income: work on the decennial Census (less than 180 days and not resulting in a permanent position) (§ 5.609(b)(24)(i)); direct Federal or State payments or tax credits intended for economic stimulus or recovery (§ 5.609(b)(24)(ii)); amounts received directly by the family as a result of State or Federal refundable tax credits or refunds at the time they are received (§ 5.609(b)(24)(iii) and (iv)); gifts for holidays, birthdays, or special occasions (§ 5.609(b)(24)(v)); in-kind donations from food banks or other organizations (§ 5.609(b)(24)(vi)); and lump-sum additions to assets such as lottery or other contest winning (§ 5.609(b)(24)(vii)).
- With these revisions and additions, HUD intends to exclude from income sources of funds that cannot be relied upon to pay for a family's housing needs, while providing additional clarity to PHAs and owners about what funds should still be considered income, given the broad definition contained in HOTMA.
- HUD is expanding § 5.609(b)(19) to cover all payments to a family from a state agency, regardless of whether such a payment is through Medicaid for the care of a family member in order for them to remain in the unit. The final rule includes funding through any Medicaid structure, not just managed care. Furthermore, it also excludes payments from, or authorized by, State agencies in states which use a source of funding other than Medicaid to provide in-home support. HUD will continue to count payments for long-term care insurance as an unreimbursed health and medical care expense for purposes of § 5.611(a)(3)(i), but HUD clarifies that the payments cannot be excluded from the family's income.
- HUD is adding language in the final rule that payments to a member of the assisted family by the State Medicaid agency-managed care system or other

State or Federal agency (or other entities authorized by those agencies to make such payments) for caregiving services to enable a family member who has a disability to live in the assisted unit are covered payments and would be excluded from the family's income.

- HUD codifies a Federally mandated income exclusion under section 479B of the Higher Education Act of 1965 (HEA) (20 U.S.C. 1087uu). Section 5.609(b)(9)(i) of the final rule excludes assistance that section 479B of the HEA requires to be excluded from a family's income. This provision excludes from income assistance to students under Title IV of the HEA even assistance in excess of tuition and required fees and charges. Student financial assistance must be a grant or scholarship received from the Federal government; a State, Tribal, or local government; a private foundation registered as a nonprofit; a business entity; or an institution of higher education. Furthermore, the grant or scholarship must be either expressly for tuition, book, supplies, room and board, or other fees required and charged to the student by the education institution; expressly to assist a student with the costs of higher education; or expressly to assist a student who is not the head of household or spouse with the reasonable and actual costs of housing while attending the education institution and not residing in an assisted unit.
- The final rule states that student financial assistance does not include gifts from family or friends. In other words, gifts that are recurring and otherwise do not meet the criteria for the income exclusion for gifts would be counted as income under the final rule, regardless of whether the recipient of the gift is a student.
- Clarifying that the Final Rule excludes from income insurance payments, settlements for personal or property losses, and recoveries from civil actions or settlements based on claims of malpractice, negligence, or other breach of duty owed to a family member arising out of law that resulted in a member of the family becoming a family member with a disability.
- Section 104 of HOTMA, which amended Section 16 of the 1937 Act, excluded irrevocable trusts and trust funds that are not under the control of the family or household from being considered part of a family's net family assets.
- HUD is clarifying § 5.609(b)(2) to exclude from a family's income any distributions of a trust's principal, regardless of the form of the trust, because this is not income for the family.
- Clarifying that revocable trusts under control of the family count as an asset under the definition of "net family assets" in § 5.603. Only trusts that are irrevocable or not under the control of a family or household member are excluded from a family's net family assets. Since revocable trusts under the control of the family or household are considered part of the net family assets, the final rule clarifies at § 5.609(b)(2)(ii) that distributions from these trusts are

not used to calculate annual income. Instead, HACCC must count all actual returns (e.g., interest earned) from the trust as income or, if the trust has no actual returns and the total value of the combined net family assets exceeds \$50,000 (as that amount is updated for inflation), as imputed returns, as applicable, under § 5.609(a)(2).

- Under the amended 1937 Act, families that have a present ownership interest in, a legal right to reside in, and the legal authority to sell real property that is suitable for occupancy for the family (unless the person is a victim of domestic violence or if the family is offering the property for sale) are not eligible to receive rental assistance. A present ownership interest would include any title to a home, any ownership of membership shares in a cooperative, and any lease or other right to occupy a home or cooperative, all as defined by the State or local laws of the jurisdiction where the property is located.
- This provision would not include the right to purchase title to a residence under a lease-purchase agreement. In addition, the statutory language excludes from net family assets (1) real property for which the family does not have the effective legal authority to sell in the jurisdiction in which the property is located and (2) equity in property for which the family is currently receiving homeownership assistance through the HCV program from a PHA.
- Amended the list of units not dependent on the Site-based waiting lists for PBV properties and occupied by referrals from the Coordinated Entry System for homeless set-aside units.
- Added language regarding the Emergency Housing Voucher Program and administration of the vouchers.

B.1 (c) Deconcentration Policy

Deconcentration of Poverty and Income-Mixing [24 CFR 903.1 and 903.2]

HACCC's admission policy must be designed to provide for deconcentration of poverty and income-mixing by bringing higher income tenants into lower income projects and lower income tenants into higher income projects. A statement of HACCC's deconcentration policies must be included in its annual plan [24 CFR 903.7(b)].

HACCC's deconcentration policy must comply with its obligation to meet the income targeting requirement [24 CFR 903.2(c)(5)].

Developments subject to the deconcentration requirement are referred to as 'covered developments' and include general occupancy (family) public housing developments. The following developments are not subject to deconcentration and income mixing requirements: developments operated by a PHA with fewer than 100 public housing units; mixed population or developments designated specifically for elderly or disabled families; developments operated by a PHA with only one general occupancy development; developments approved for demolition or for conversion to tenant-based public housing; and developments approved for a mixed-finance plan using HOPE VI or public housing funds [24 CFR 903.2(b)].

Steps for Implementation [24 CFR 903.2(c)(1)]

To implement the statutory requirement to deconcentrate poverty and provide for income mixing in covered developments, HACCC must comply with the following steps:

Step 1. HACCC must determine the average income of all families residing in all HACCC's covered developments. HACCC may use the median income, instead of average income, provided that HACCC includes a written explanation in its annual plan justifying the use of median income.

HACCC Policy

HACCC will determine the average income of all families in all covered developments on an annual basis.

Step 2. HACCC must determine the average income (or median income, if median income was used in Step 1) of all families residing in each covered development. In determining average income for each development, HACCC has the option of adjusting its income analysis for unit size in accordance with procedures prescribed by HUD.

HACCC Policy

HACCC will determine the average income of all families residing in each covered development (not adjusting for unit size) on an annual basis.

Step 3. HACCC must then determine whether each of its covered developments falls above, within, or below the established income range (EIR), which is from 85% to 115% of the average family income determined in Step 1. However, the upper limit must never be less than the income at which a family would be defined as an extremely low income family (30% of median income).

Step 4. HACCC with covered developments having average incomes outside the EIR must then determine whether or not these developments are consistent with its local goals and annual plan.

Step 5. Where the income profile for a covered development is not explained or justified in the annual plan submission, HACCC must include in its admission policy its specific policy to provide for deconcentration of poverty and income mixing.

Depending on local circumstances HACCC's deconcentration policy may include, but is not limited to the following:

- Providing incentives to encourage families to accept units in developments where their income level is needed, including rent incentives, affirmative marketing plans, or added amenities
- Targeting investment and capital improvements toward developments with an average income below the EIR to encourage families with incomes above the EIR to accept units in those developments
- Establishing a preference for admission of working families in developments below the EIR
- Skipping a family on the waiting list to reach another family in an effort to further the goals of deconcentration
- Providing other strategies permitted by statute and determined by HACCC in consultation with the residents and the community through the annual plan process to be responsive to local needs and PHA strategic objectives

A family has the sole discretion whether to accept an offer of a unit made under HACCC's deconcentration policy. HACCC must not take any adverse action toward any eligible family for choosing not to accept an offer of a unit under HACCC's deconcentration policy [24 CFR 903.2(c)(4)].

If, at annual review, the average incomes at all general occupancy developments are within the EIR, HACCC will be considered to be in compliance with the deconcentration requirement and no further action is required.

Deconcentration Incentives

HACCC has 3 general occupancy (family) public housing developments covered by the deconcentration rule. None of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments. The Contra Costa Housing Authority will analyze developments on a regular basis according to the deconcentration rule.

B.1 (a) Housing Needs

Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location.

High housing costs reduce economic opportunities, limit access to jobs and services, and restrict the ability of lower-income households, including the elderly and persons with disabilities, to live in the communities and neighborhoods of their choice. The gap between what lower income households can afford, and the median price of homes or rents (an affordability gap) results in households paying more than 30 percent of their income for housing, and in overcrowding.

Based on the most recent Consolidated Plan for the County (2020-2025), of 384,644 households in the HOME Consortia area, there are 184,698 households or 48 percent of all households that are at 100 percent of Area Median Income (AMI) or below. Of these households, nearly 70 percent experience at least one or more housing problems as defined by HUD. Renters make up 50 percent of those experiencing one or more housing problems.

The area of greatest need is among renters in the extremely low-income category: 30,485 households, or 45 percent, experience substandard housing, overcrowding, or cost burden. Of those, 69 percent suffer from a cost burden of greater than 50 percent of income.

Cost burden is a significant issue for homeowners earning less than 100 percent of AMI. Of those with a housing problem, 85 percent are cost burdened; 41 percent are paying more than 50 percent of their incomes in housing costs.

Small family households make up the largest proportion of extremely-low (34%), and low-income (33.9%) households. Households with at least one person between the ages of 62 and 74 have the next highest proportion of extremely-low (20%) and low-income (23%) households.

There are 86,275 single-person households in the Contra Costa HOME Consortium. There are households with at least one member 65 years or older. Of these households, 57 percent are low-income. Because many elderly live alone, it is probable that many one person households are elderly. In addition, most of the elderly homeowners live in older homes with deferred maintenance and in need of rehabilitation.

According to HUD, disproportionate need refers to any need that is more than ten percentage points above the need demonstrated for the total households. The Contra Costa Consortium has 384,593 households, 184,698 of which have incomes below AMI. The number of households below AMI with a housing problem is 123,595, which represents about 67 percent of below-AMI households. While all racial/ethnic groups at particular income levels experience housing problems, there are three groups experiencing disproportionate housing need throughout the income spectrum. At the extremely low-income range (0-30 percent AMI) 85 percent of all extremely low-income households have a housing need, while 99 percent of American Indian/Alaska Natives experience a disproportionate need. At the low-income range

(30-50 percent AMI), 75 percent of all low-income households experience a housing need, while 94 percent of Pacific Islander and 86 percent of Black/African American households experience a disproportionate housing need. At the moderate-income range (50- 80 percent AMI), 60 percent of all moderate-income households have a housing need; however, there is no particular group experiencing a disproportionate need compared to the total moderate-income households. At median income (80-100 percent AMI), 45 percent of all households have a housing need, while both American Indians/Alaska Natives (56 percent) and Pacific Islanders (75 percent) experience a disproportionate housing need.

The number of Contra Costa HOME Consortium households with a severe housing problem is 74,722, which represents about 40 percent of all households below 100 percent AMI. While all racial/ethnic groups experience housing problems at particular income levels, there are three groups experiencing disproportionate housing need throughout the income spectrum. At the extremely low-income range (0- 30 percent AMI), 72.2 percent of all households have a severe housing need, and 79 percent of Hispanics experience a disproportionate need. At the very-low income range (30-50 percent AMI), 44.9 percent of all households experience a housing need, while 89 percent of Pacific Islanders experience a disproportionate severe housing need. At the low-income range (50-80 percent AMI), 23.9 percent of all households experience a housing need, while 32 percent of Pacific Islanders experience a disproportionate housing need. At the median income range (80-100 percent AMI), 13.7 percent of all households have a housing need, while 20.3 percent of Pacific Islanders experience a disproportionate severe housing need.

Per HUD definitions, a “disproportionate need” exists when any group has a housing need that is 10% or higher than the jurisdiction as a whole. A household is considered cost burdened when they are paying more than 30% of their income towards housing costs, including utilities. A household is considered severely cost burdened when they are paying more than 50% of their income towards housing costs, including utilities. In Contra Costa, 39% of all households are either cost burdened, or severely cost burdened. Both Black/African Americans (9,628 households, 28.6%) and Pacific Islanders (1,371 households, 29.1%) experience disproportionate severe cost burden.

There are 44,763 households with incomes at or less than 30 percent of the AMI with a housing problem. American Indians, Alaska Natives (335 households, 96 percent) have a disproportionate need. There are 34,062 households with incomes between 30 and 50 percent of the AMI with a housing problem. Black/African American (4,242 households, 86 percent) and Pacific Islanders (175 households, 95 percent) have a disproportionate need in this income category. There are 28,744 households with incomes between 50 and 80 percent of the AMI with a housing problem. There are no racial or ethnic groups that have a disproportionate need within this income category.

There are 37,878 households with incomes at or less than 30 percent of the AMI with a severe housing problem. Hispanics (10,728 households, 78 percent) have a disproportionate need. There are 20,372 households with incomes between 30 and 50 percent of the AMI with a housing problem. Pacific Islanders (165 households, 89 percent) have a disproportionate need. There are 11,574 households with incomes between 50 and 80 percent of the AMI with a housing problem. There are no racial or ethnic groups that have a disproportionate need.

46.2% of the County's renter households live in overcrowded housing. Among racial and ethnic groups reported in the Census, Latino/Hispanic households are most likely to live in crowded conditions in the County with 12.8% in such conditions.

According to 2010 U.S. Census Data, the population of seniors 65 and older from 2000 to 2010 increased from 107,272 to 130,432 in Contra Costa County, an increase of 21.5 percent. According to the American Community Survey (2013-17), 24 percent of households were headed by seniors. Three jurisdictions with the largest share of senior households are Walnut Creek (40.9 percent), Moraga (35.3 percent), and Orinda (35.2 percent) (ACS Data 2013-2017). Of the total County's senior population, nearly 34 percent have a disability limitation. Of all the jurisdictions in the County, San Pablo (44.1 percent), Pittsburg (43.1 percent), and Oakley (41.5 percent) have the highest share of senior populations living with disabilities.

There are only approximately 10,200 assisted rental units affordable to lower-income households, of which, over 950 are at risk of converting to market rate housing. Over 7,000 beds in 473 residential care facilities are available for individuals with special needs, (such as frail elderly and persons with disabilities) who cannot live independently in conventional housing. However, this is significantly less than the population of frail elderly, disabled, and others who may need a supportive housing environment.

Due to the ongoing gap in the availability of affordable housing, the County Consortium has assigned a high priority to new housing construction, homeownership assistance, and housing rehabilitation, particularly for households earning less than 50 percent of the area median income.

Two final measures of need are seen in HACCC's most recent housing choice voucher and public housing wait list openings. In November 2008 the voucher wait list opening attracted nearly 40,000 families who applied for 6,000 positions on the wait list. In addition, over 45,000 households are waiting for Project-Based Voucher units. In March 2017, nearly 17,000 families applied for the wait list for HACCC's 963-unit public housing program.

B.2 New Activities:

- a) **HOPE VI or Mixed Finance Modernization or Development.** HACCC will continue to work with CSG Advisors and other consultants in order to identify funding mechanisms to rehabilitate or redevelop all of its public housing properties. HACCC's goal is to preserve or increase the number of housing units affordable to public housing eligible families (regardless of whether they remain public housing specifically) and to provide adequate funding for these units over the long term. HACCC continues to evaluate and consider its options for development and preservation of its public housing portfolio. Addressing its needs may include applying for additional RAD, Choice Neighborhoods, a Phase II Energy Performance Contract or any other appropriate HUD programs. HACCC has already been awarded RAD funding for 214 units at Las Deltas in North Richmond (CA011-006, CA011-009A, CA011-009B). HACCC may also seek state and local funding through bonds, tax credits or any other available programs.

The HACCC has recently completed a demolition action for 128 units at the Las Deltas (CA006 and CA009A) property in North Richmond and approved for a disposition application for the remaining of the 32 units at Las Deltas(CA009b) in North Richmond. 107 units were disposed through the RAD Conversion process and a separate application process was completed for demolition and disposition of those 107 units and corresponding release of the DOT.

Timeline: An application for demo/dispo of the RAD units was approved through HUD's Special Applications Center in October of 2019. Demolition of the units in properties 006 and 009A for the non-RAD units was completed in October of 2020. HACCC plans to issue a Request For Proposals from developers to submit suggestions for the development of the contiguous site of the property with an expectation to enter into an Exclusive Negotiating Agreement with the submitter with the best proposal after getting community input on the proposed development plans. 81 occupied units were assisted with relocation services and all units are now vacant.

- b) **Conversion of Public Housing.** HACCC continues to work with consultants in order to identify funding mechanisms to rehabilitate or redevelop all of its public housing properties. An analysis completed by CSG showed that a viable plan does not exist to adequately fund rehabilitation and ongoing maintenance at any of HACCC's public housing properties, HACCC may submit voucher conversion applications for any of its public housing properties. HACCC also may submit applications to HUD for any other conversion funding programs that become available. It is expected that the next projects for consideration to convert to Project Based assistance will be El Pueblo in Pittsburg and Bayo Vista in Rodeo, CA.
- c) **Homeownership.** HACCC currently offers a homeownership voucher program.
- d) **Project-based Vouchers.** HACCC has already committed 1872 project-based vouchers (PBV). In addition, HACCC has approved 288 RAD PBV units for thirteen projects, including one under the RAD 2 component for conversion of a Mod Rehab Single Room Occupancy property and two from the City of Richmond. The RAD PBVs are replacement housing for units removed from the public housing inventory at Las Deltas and the Richmond Housing Authority's Public Housing disposition. The use of PBVs is consistent with HACCC's PHA Plan. Among HACCC's goals are to expand the supply of assisted housing and to increase assisted housing choices. By utilizing PBVs from HACCC, developers are able to leverage funding and produce additional units of new or modernized affordable housing. HACCC plans to award PBV funding throughout its jurisdiction in order to provide affordable housing options for clients in as broad a geographic area as possible. HACCC may also utilize PBVs in any other public housing redevelopment/repositioning projects it may undertake.
- e) Moreover, it is anticipated that over the course of the next five years, three other sites from Richmond will be converted under RAD or Section 18 Demolition and Disposition that will allocate another 267 PBVs for HACCC to administer.

HOUSING AUTHORITY OF THE COUNTY OF CONTRA COSTA

PROGRESS IN MEETING GOALS

Goal: Expand the Supply of Assisted Housing

Progress Report:

- Received 4 RAD awards for Las Deltas property to convert the 214 units to project-based vouchers that can be leveraged to develop a greater number of new units.
- Awarded 185 units of project-based vouchers (PBV) and 119 units of Rental Assistance Demonstration (RAD) PBV to 11 projects throughout Contra Costa County. These vouchers (including the project-based vouchers) helped fund 591 units of new affordable housing.
- Awarded a new round of 388 PBVs to 17 projects throughout Contra Cost County. These vouchers, including the PBVs, helped fund 1265 additional units of affordable housing for Contra Costa County. 138 units are part of a Richmond Housing Authority Public Housing disposition action. Total PBVs assisted to date = 2177.
- Continue to partner with County to maximize utilization of Shelter-Plus Care program. Now serves over 325 households.
- Housed nearly 263 veteran households through the VASH program
- Awarded an additional 120 VASH vouchers due to the efficient utilization of prior allotments.
- Awarded 85 Fair Share Vouchers. These vouchers are not “special use vouchers” and so this funding allowed the HACCC to issue vouchers to families from the Housing Choice Voucher waiting list.
- Awarded 41 Stability Vouchers. These Vouchers will be used to assist households who are homeless, at-risk of homelessness and those fleeing or attempting to flee domestic violence dating violence, sexual assault, stalking, or human trafficking.
- Awarded 13 Foster Youth Initiative for Independence (FYI). These vouchers allow the HACCC to issue vouchers to youth under the age of 25 with a history of child welfare involvement for up to 36 months.
- Transitioned a 11-unit HUD Multi-Family housing development to Enhanced Vouchers.
- Successfully placed 1 household into the HCV Homeownership Program with four additional households actively searching for homes for a total of 11 households to date.
- Maintained average occupancy at most properties to 98% or better.
- Housed 172 households in the Mainstream program for non-elderly disabled households.
- Received 201 Emergency Housing Vouchers to assist households in Permanent Supportive Housing and County Shelters transition to permanent housing and thus making slots available for unsheltered families to move to shelters and sheltered households to move to Permanent Supportive Housing.

Goal: Improve the Quality of Assisted Housing

Progress Report:

- HACCC anticipates utilizing approximately \$2.6 million of HUD funding for a variety of modernization improvements at all its public housing developments. Specific

improvements include:

- Gas line and plumbing upgrades at the Los Nogales development.
 - Phase 2 modernization of Alhambra Terrace development.
 - Continuous repairs and replacement of concrete walk and driveways at various properties.
 - New appliances at various properties to replace aging appliances.
 - Window upgrades during unit turnovers.
 - New styles of interior finishes are being utilized in public housing units to upgrade the appearance of units so that they more closely emulate market-rate units.
 - Ongoing tree trimming/removal at all sites
- Apart from Las Deltas, every public housing property now has an average occupancy rate that is at or above 97-98%;
 - Work order turnaround times continue to improve through the implementation of new processes.
 - Continue to operate medical office in the Bayo Vista development in collaboration with Life Long Medical services.
 - PASS scores for public housing unit inspections continue to meet expectations.
 - 70 percent of HACCC paper tenant files were converted for storage in the electronic record management software implemented this year. The HACCC is on track to convert all paper files to electronic records by the end of 2023. This initiative improves data security and allows the HACCC to redirect labor hours from administrative duties to direct tenant services.
 - The Housing Choice Voucher program began scanning “day-forward” documents to the existing electronic tenant file via barcode. This tool streamlines the processing of incoming paper documents sent by participants to their HACCC assistance teams during annual recertification, interim income changes and initial leasing.
 - The Housing Choice Voucher program began automated phone call campaigns notifying tenants and landlords of upcoming inspections. Preliminary data suggests that this initiative increases the rate of repairs prior to the inspection date and decreases the rate of “no-shows”.
 - The Housing Choice voucher program has registered over 750 new tenant and landlord accounts for our online self-service portals since January of 2023. Additionally, the HACCC has made annual recertification workflows available within this online portal for the first group of HCV participants.
 - The HACCC has completed configuration of call center software which will modernize our agency phone system, improve call routing, and improve response times when implemented.
 - Transition of the Housing Choice Voucher department workflow management tools to SharePoint began. This will create a more stable and reliable workflow management tool that is able to leverage existing business software data seamlessly. This will improve the reliability and stability of the workflow management tools, streamline service delivery, and improve response times for incoming inquiries.

Goal: Provide an Improved Living Environment

Progress Report:

- Provide continuous funding for police/Sheriff patrols at two public housing communities.
- Continue to work with several County and local agencies to coordinate funding to increase programs at public housing properties.
- Continue to coordinate communication between management staff and sheriff and local law enforcement officers at public housing properties.
- Seeking additional funding for camera systems at our public housing developments. Will apply to grants in the spring of 2024.
- Campaign to increase the number of RAB members.
- Expanded RAB meetings to be held virtually with the goal to meet in person next year.
- Collaborate with our commissioner to reinstate youth activities in El Pueblo Housing Development that were closed due to Covid-19. The Center will provide a variety of activities including recreational, afterschool program and library programs.
- Partnered with the County to offer Head Start facilities at three public housing properties.
- Continued operation of a variety of social, nutrition and service programs at our properties.
- Providing medical services to public housing and low-income residents of the Rodeo area, through a new medical office operated by Lifelong Medical at the Bayo Vista Development.
- Established a partnership with John Muir Mobil Clinic to provide medical services to the community at El Pueblo.

Goal: Promote Self-sufficiency and Asset Development of Assisted Households

Progress Report:

- Since January of 2016, HACCC had 71 participants graduate from its FSS Program with \$1,205,958.42 in escrow.
- Employed Section 3 hires through construction contracts, employment training and jobs programs, or direct hires in a variety of contracts.
- Partnered with Kaiser Permanente School of Allied Health Sciences, Contra Costa College, Opportunity Junction, and Martinez Adult Education to develop MOUs that aligns common goals for self-sufficiency for low income families in Contra Costa County;
- Continue to promote partnerships with Public Housing tenants and Voucher recipients to be hired as Section 3 employees to help maintain landscaping services to HACCC's properties.

Goal: Ensure Equal Opportunity in Housing

Progress Report:

- Updating Reasonable Accommodation forms and procedures with ongoing training to all staff, including our Maintenance team.
- Ongoing training on Violence Against Women's Act.
- Continue to train on Limited English Proficiency requirements for all HCV and public housing managers.
- Continue to use other external and internal legal providers to conduct Fair Housing training for staff.

Annual Statement / Performance and Evaluation Report
Part I: Summary
Capital Fund Program (CFP)

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing

HA Name: 3843480 Capital Fund Program Grant Number: -101522 OMB Approval No. 2577-0274 (Exp. 07/31/2017) FFY of Grant Approval: 2024

Housing Authority of the County of Contra Costa
 Annual Statement (Reserve for Disasters/Emergencies Revised Annual Statement/Revision Number 1 Performance and Evaluation Report for Program Year Ending ____)

Line No.	Summary by Development Account	Total Estimated Cost			Total Actual Cost	
		Original	Revised	Obligated	Expended	
1	Total Non-CGP Funds					
2	1406 Operations (May not exceed 25% of line 20)	\$986,250	\$0	\$0	\$0	
3	1408 Management Improvements Soft Costs	\$394,500	\$0	\$0	\$0	
	Management Improvements Hard Costs					
4	1410 Administration	\$394,500	\$0	\$0	\$0	
5	1411 Audit	\$2,000	\$0	\$0	\$0	
6	1415 Liquidated Damages					
7	1430 Fees and Costs	\$384,348	\$0	\$0	\$0	
8	1440 Site Acquisition					
9	1450 Site Improvement	\$384,348	\$0	\$0	\$0	
10	1460 Dwelling Structures	\$745,665	\$0	\$0	\$0	
11	1465.1 Dwelling Equipment - Nonexpendable	\$115,304	\$0	\$0	\$0	
12	1470 Nondwelling Structures	\$499,652	\$0	\$0	\$0	
13	1475 Nondwelling Equipment	\$38,435	\$0	\$0	\$0	
14	1485 Demolition	\$0	\$0	\$0	\$0	
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs	\$0	\$0	\$0	\$0	
18	1498 Mod Used for Development					
19	1502 Contingency (may not exceed 8% of line 20)	\$0	\$0	\$0	\$0	
20	Amount of Annual Grant (Sum of lines 2 - 19)	\$3,945,002	\$0	\$0	\$0	
21	Amount of line 20 Related to LBP Activities					
22	Amount of line 20 Related to Section 504 Compliance					
23	Amount of line 20 Related to Security					
24	Amount of line 20 Related to Energy Conservation Measures					
			\$0		\$3,945,002.00	

Signature of Executive Director and Date _____ Signature of Public Housing Director/Office of Native American Programs Administrator and Date _____

Annual Statement / Performance and Evaluation Report
Part II: Supporting Pages
Capital Fund Program (CFP)

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

Development Number / Name HA - Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
<u>PHA Wide</u>	<u>Operations</u>	1406		\$986,250	\$0	\$0	\$0
				\$986,250	\$0	\$0	\$0
				\$0	\$0	\$0	\$0
				\$0	\$0	\$0	\$0
	Total for Account 1406			\$986,250	\$0	\$0	\$0
<u>PHA Wide</u>	<u>Management Improvements</u>	1408					
	Property Security in disposed units	1408		\$394,500	\$0	\$0	\$0
		1408					
	Total for Account 1408			\$394,500	\$0	\$0	\$0
<u>PHA Wide</u>	<u>Administration</u>	1410					
	-Technical and Non-Technical-Salaries & Benefit			\$394,500	\$0	\$0	\$0
	Total for Account 1410			\$394,500	\$0	\$0	\$0
<u>PHA Wide</u>	<u>Audit</u>	1411		\$2,000	\$0	\$0	\$0
				\$2,000	\$0	\$0	\$0
	Total for Account 1411			\$2,000	\$0	\$0	\$0
<u>PHA Wide</u>	<u>Fees and Costs</u>	1430		\$384,348	\$0	\$0	\$0
	-Project Management, Planning Costs						
	Prorated annual amount posted						
	Total for Account 1430			\$384,348	\$0	\$0	\$0
CA-011001	<u>Site Improvements</u>	1450		\$384,348	\$0	\$0	\$0
	-Landscape Improvements						
	Total for Account 1450			\$384,348	\$0	\$0	\$0
CA-011003	<u>Site Improvements</u>	1450					
	-Landscape Improvements						
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011004	<u>Site Improvements</u>	1450					
	-Landscape Improvements						
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011005	<u>Site Improvements</u>	1450					
	-Landscape Improvements						
	Total for Account 1450			\$0	\$0	\$0	\$0

**Annual Statement /
Performance and Evaluation Report
Part II: Supporting Pages
Capital Fund Program (CFP)**

**U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing**

Development Number / Name HA - Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
CA-011006	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011008	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011010	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011098b	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011012	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011013	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011015	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011098	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0
CA-011018	Site Improvements -Landscape Improvements	1450		\$0	\$0	\$0	\$0
	Total for Account 1450			\$0	\$0	\$0	\$0

**Annual Statement /
Performance and Evaluation Report
Part II: Supporting Pages
Capital Fund Program (CFP)**

**U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing**

Development Number / Name FA - Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
CA-011001	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
CA-011003	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$745,665	\$0	\$0	\$0
CA-011004	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$745,665	\$0	\$0	\$0
CA-011005	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
CA-011010	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
CA-011011	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
CA-011012	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
CA-011013	Total for Account 1460 <u>Dwelling Structures</u> -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
CA-011015	Total for Account 1460 <u>Dwelling Structures</u>	1460		\$0	\$0	\$0	\$0

**Annual Statement /
Performance and Evaluation Report
Part II: Supporting Pages
Capital Fund Program (CFP)**

**U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing**

Development Number / Name NA - Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
	-Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
	Total for Account 1460			\$0	\$0	\$0	\$0
CA-011017	Dwelling Structures -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
	Total for Account 1460			\$0	\$0	\$0	\$0
CA-011018	Dwelling Structures -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
	Total for Account 1460			\$0	\$0	\$0	\$0
CA-011008	Dwelling Structures -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
	Total for Account 1460			\$0	\$0	\$0	\$0
CA-01109b	Dwelling Structures -Unit Interior Modernization	1460		\$0	\$0	\$0	\$0
	Total for Account 1460			\$0	\$0	\$0	\$0
<u>PHA Wide</u>	Dwelling Equipment	1465.1		\$0	\$0	\$0	\$0
	Accessibility Improvements	1470		\$0	\$0	\$0	\$0
	Non Dwelling Equipment	1475		\$0	\$0	\$0	\$0
	Demolition	1485		\$0	\$0	\$0	\$0
	Relocation Costs	1495.1		\$0	\$0	\$0	\$0
	Contingency	1502		\$0	\$0	\$0	\$0
	Totals			\$3,945,002	\$0	\$0	\$0

(1) To be completed for

Signature of Executive Director and Date

(2) To be completed for the Performance and Evaluation Report.

Signature of Public Housing Director/Office of Native American Programs Administrator and Date

Annual Statement / Performance and Evaluation Report
Part III: Implementation Schedule
Capital Fund Program (CFP)

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

OMB Approval No. 2577-0274 (Exp. 07/31/2017)

Development Number / Name HA - Wide Activities	All Funds Obligated (Quarter Ending Date)		All Funds Expended (Quarter Ending Date)		Reasons for Revised Target Dates (2)
	Original	Revised	Original	Actual	
To be completed for the Performance and Evaluation Report or a Revised Annual Statement.					
Signature of Executive Director and Date					
Signature of Public Housing Director/Office of Native American Programs Administrator and Date					

(2) To be completed for the Performance and Evaluation Report.

HOUSING RESIDENT ADVISORY BOARD
SUGGESTIONS

Suggestion to expand the supply of Assisted Housing

1. Work closer with groups like non-profit housing developers or other type of housing agencies to provide units to residents.
2. Look into buying dilapidated and/or abandoned homes and refurbish them and rent the units to HCV participants
3. Access older properties and figure out reasonable ways and means of improvement.
4. Purchase hotels, motels or vacant homes and rent rooms to single persons.
5. Encourage landlords to lease their property to HCV program participants.
6. Improve success rate of finding housing for voucher holders.
7. More Project Based Voucher partnerships with developers.
8. Seek more funding opportunities for more vouchers/housing.
9. Form partnerships with private entities to help finance the purchase of properties for rent to low-income families.

Suggestion to improve the quality of Assisted Housing

1. Look into using other federal funding (if possible), CDBG, private investors (who could contribute labor and materials as a tax write-off).
2. Explore the idea to have tenants work with agencies to receive funding to purchase and rebuild units in areas they currently live.
3. Work with banks to supply low-interest loans to residents to purchase a home.
4. Change filters in the furnace and air conditioner in units.
5. When tenants move into units provide helpful hints and tips on cleaning the stove and areas in the kitchen.
6. Provide tenants trash rules to avoid the trash from being spread throughout the complex.
7. Install fire extinguishers on the outside of buildings at all Senior/Disable properties
8. Expand security camera program to all sites.
9. Property Managers or Assistants should walk the property at least twice of week to have cars tagged and have areas cleaned up.
10. Have training for some maintenance to improve the quality of work.
11. Retrofit all units with energy saving improvements such as double pane windows, electric stoves and weather stripping on doors and windows.
12. Continue to repair uneven sidewalks and concrete along walking paths.
13. Assess properties for physical needs and make improvements.
14. Improving landscaping at properties

Suggestion to provide an improved Living Environment

1. For repair work hire outside contractors willing to donate time and materials in lieu of financial compensation, but they could get a tax write-offs.

HOUSING RESIDENT ADVISORY BOARD

SUGGESTIONS (CONT)

Suggestion to provide an improved Living Environment(cont)

2. Begin training programs for interested tenants that teach them how to perform their own small maintenance needs. Some expenses incurred could be deducted from tenant's rent. Repairs would be done under HA supervision and with prior consent of management.
3. Work with county to rid properties of raccoons, feral cats, opossums, wasps' nests, etc
4. Residents need to get involved in improving their complexes.
5. Explore options to improve landscaping at properties.
6. Work with local police agencies to get police logs for troubled tenants.
7. Upgrade all appliances in the units.
8. Improve the sewer lines at properties.
9. Expand the tenant involvement in activities at property and activate tenant resident councils at all sites
10. Explore having picnic tables with chess or checkers board built in for residents to play on.
11. Look into have lawn activities at Senior/Disable properties.
12. Restore Friday Night Movies for residents in Senior buildings
13. Upgrade lighting at properties.
14. Remove glass shower doors for Senior/Disable clients and get tub with lower sides.
15. Improve signage at El Pueblo so deliveries and medical responders know where units are. Addresses are not clear or obvious.
16. Open up community centers at all properties and help residents utilize the facilities.
17. Have Town Hall meetings and workshops to get more feedback, opinions and concerns from residents.
18. Encourage all properties to share resources such as expansion of social programs and resident networking.

Suggestion to promote Self-Sufficiency and Asset Development of Assisted Households

1. Organize a program where tenants are taught how to survive after a natural disaster.
2. Properties should have a community newsletter.
3. Expand resource centers at more properties.
4. Organize more social activities at Disable/Senior properties.
5. Create a homeownership program for public housing residents
6. Host job fairs at properties and make tenants aware of the various social programs HACCC has.

**Certification by State or Local
Official of PHA Plans Consistency
with the Consolidated Plan or
State Consolidated Plan
(All PHAs)**

U. S Department of Housing and Urban Development

Office of Public and Indian Housing

OMB No. 2577-0226

Expires 3/31/2024

**Certification by State or Local Official of PHA Plans
Consistency with the Consolidated Plan or State Consolidated Plan**

I, Gabriel Lemus, the Assistant Deputy Director
Official's Name *Official's Title*

certify that the 5-Year PHA Plan for fiscal years _____ and/or Annual PHA Plan for fiscal year 2024 of the Housing Authority of the County of Contra Costa is consistent with the
PHA Name

Consolidated Plan or State Consolidated Plan including the Analysis of Impediments (AI) to Fair Housing Choice or Assessment of Fair Housing (AFH) as applicable to the

County of Contra Costa

Local Jurisdiction Name

pursuant to 24 CFR Part 91 and 24 CFR §§ 903.7(o)(3) and 903.15.

Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or State Consolidated Plan.

The Consolidated Plan is created and implemented with the input of the Housing Authority and its residents. Both plans address the services available to low and very low income households and how each agency is providing affordable housing to low-income and very-low income eligible residents

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official:

Gabriel Lemus

Title:

Assistant Deputy Director

Signature:

Date: September 26, 2023

The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality. This information is collected to ensure consistency with the consolidated plan or state consolidated plan.

Public reporting burden for this information collection is estimated to average 0.16 hours per year per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**Certifications of Compliance with
PHA Plan and Related Regulations
(Standard, Troubled, HCV-Only, and
High Performer PHAs)**

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 3/31/2024

**PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations
including PHA Plan Elements that Have Changed**

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairperson or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the ___ 5-Year and/or X Annual PHA Plan, hereinafter referred to as "the Plan", of which this document is a part, and make the following certification and agreements with the Department of Housing and Urban Development (HUD) for the PHA fiscal year beginning 4/1/2024, in connection with the submission of the Plan and implementation thereof:

1. 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 (24 CFR § 91.2).
2. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments (AI) to Fair Housing Choice, or Assessment of Fair Housing (AFH) when applicable, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan (24 CFR §§ 91.2, 91.225, 91.325, and 91.425).
3. The PHA has established a Resident Advisory Board or Boards, the membership of which represents the residents assisted by the PHA, consulted with this Resident Advisory Board or Boards in developing the Plan, including any changes or revisions to the policies and programs identified in the Plan before they were implemented, and considered the recommendations of the RAB (24 CFR 903.13). The PHA has included in the Plan submission a copy of the recommendations made by the Resident Advisory Board or Boards and a description of the manner in which the Plan addresses these recommendations.
4. The PHA provides assurance as part of this certification that:
 - (i) The Resident Advisory Board had an opportunity to review and comment on the changes to the policies and programs before implementation by the PHA;
 - (ii) The changes were duly approved by the PHA Board of Directors (or similar governing body); and
 - (iii) The revised policies and programs are available for review and inspection, at the principal office of the PHA during normal business hours.
5. The PHA made the proposed Plan and all information relevant to the public hearing available for public inspection at least 45 days before the hearing, published a notice that a hearing would be held and conducted a hearing to discuss the Plan and invited public comment.
6. The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d-2000d-4), the Fair Housing Act (42 U.S.C. 3601-19), Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), title II of the Americans with Disabilities Act (42 U.S.C. 12101 et seq.), and other applicable civil rights requirements and that it will affirmatively further fair housing in the administration of the program. In addition, if it administers a Housing Choice Voucher Program, the PHA certifies that it will administer the program in conformity with the Fair Housing Act, title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, title II of the Americans with Disabilities Act, and other applicable civil rights requirements, and that it will affirmatively further fair housing in the administration of the program.
7. The PHA will affirmatively further fair housing, which means that it will take meaningful actions to further the goals identified in the Assessment of Fair Housing (AFH) conducted in accordance with the requirements of 24 CFR § 5.150 through 5.180, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR § 903.7(o)(3). The PHA will fulfill the requirements at 24 CFR § 903.7(o) and 24 CFR § 903.15(d). Until such time as the PHA is required to submit an AFH, the PHA will fulfill the requirements at 24 CFR § 903.7(o) promulgated prior to August 17, 2015, which means that it examines its programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; and maintains records reflecting these analyses and actions.
8. For PHA Plans that include a policy for site-based waiting lists:
 - The PHA regularly submits required data to HUD's 50058 PIC/IMS Module in an accurate, complete and timely manner (as specified in PIH Notice 2011-65);

- The system of site-based waiting lists provides for full disclosure to each applicant in the selection of the development in which to reside, including basic information about available sites; and an estimate of the period of time the applicant would likely have to wait to be admitted to units of different sizes and types at each site;
 - Adoption of a site-based waiting list would not violate any court order or settlement agreement or be inconsistent with a pending complaint brought by HUD;
 - The PHA shall take reasonable measures to assure that such a waiting list is consistent with affirmatively furthering fair housing; and
 - The PHA provides for review of its site-based waiting list policy to determine if it is consistent with civil rights laws and certifications, as specified in 24 CFR 903.7(o)(1).
9. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
 10. In accordance with 24 CFR § 5.105(a)(2), HUD’s Equal Access Rule, the PHA will not make a determination of eligibility for housing based on sexual orientation, gender identify, or marital status and will make no inquiries concerning the gender identification or sexual orientation of an applicant for or occupant of HUD-assisted housing.
 11. The 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.
 12. The 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 135.
 13. The 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.
 14. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
 15. The PHA will provide the responsible entity or HUD any documentation that the responsible entity or HUD needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58 or Part 50, respectively.
 16. With respect to public housing the 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.
 17. The PHA will keep records in accordance with 2 CFR 200.333 and facilitate an effective audit to determine compliance with program requirements.
 18. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act, the Residential Lead-Based Paint Hazard Reduction Act of 1992, and 24 CFR Part 35.
 19. The PHA will comply with the policies, guidelines, and requirements of 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Financial Assistance, including but not limited to submitting the assurances required under 24 CFR §§ 1.5, 3.115, 8.50, and 107.25 by submitting an SF-424, including the required assurances in SF-424B or D, as applicable.
 20. The 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 regulations and included in its Plan.
 21. All attachments to the Plan have been and will continue to be available at all times and all locations that the PHA 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 PHA in its PHA Plan and will continue to be made available at least at the primary business office of the PHA.
 22. The PHA certifies that it is in compliance with applicable Federal statutory and regulatory requirements, including the Declaration of Trust(s).

Housing Authority of the County of Contra Costa
PHA Name

CA011
PHA Number/HA Code

Annual PHA Plan for Fiscal Year 2024

5-Year PHA Plan for Fiscal Years 20____ - 20____

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802).

Name of Executive Director	Joseph Villarreal	Name Board Chairman	John Gioia
Signature	Date 12/05/2023	Signature	Date 12/05/2023

The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality. This information is collected to ensure compliance with PHA Plan, Civil Rights, and related laws and regulations including PHA plan elements that have changed.

Public reporting burden for this information collection is estimated to average 0.16 hours per year per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**RAB Meeting
September 19, 2023
RAB Member Questions & Answers**

Question: Joann Segura

Regarding the spreadsheet provided detailing Capital Fund – improvements listed by development number, name, activities. Is that how it's going to look from now on? Is it not going to say this many dollars to El Pueblo, etc.?

Answer: Tony Ucciferri

Explained the numbers associated with each development name. Will provide RAB property codes associated with each development.

**RAB Meeting
September 26, 2023
RAB Member Questions & Answers**

Question: James Murray

Is that something we have to keep up with or will housing keep up with it?

Answer: Tony Ucciferri

During your annual recertification we will notify you if it's going to be \$525 or \$530, etc. HUD is going to round down to the lowest \$25 denomination. HUD will tell us each year what the amount is going to be.

Question: James Murray

So, this doesn't include social security?

Answer: Tony Ucciferri

Correct, Mr. Murray. This is only if you have over \$50,000 and it's computed at a percentage.

Question: Deborah Drake

What you're sharing now, the summary of changes, are we going to get a copy of that?

Answer: Tony Ucciferri and Noor Al Forsland

Yes, this summary was emailed prior to this meeting. Noor Al: I also just forwarded it to you as well. If for some reason you don't have it, let us know.

Question: James Murray

Regarding the membership of the RAB, if we have 13 facilities, why do we have less members?

Answer: Tony Ucciferri and Noor Al Forsland

Time has gotten away from us. We didn't get a chance to send a mass mailer to solicit more participation in either program. We are going to get an earlier start next year than this year so that we can recruit additional members of the RAB. Noor Al: Our goal is to begin recruitment for next year in the first quarter as this is more involvement is a priority goal for us.

Question: James Murray

Years ago, HUD wanted us to have a program where there was a president, treasurer, secretary and meetings in the clubhouse. And HUD gave us money for the holidays.

Answer: Tony Ucciferri and Noor Al Forsland

Mr. Murray, you are referring to the Resident Council. This is different than the RAB. You can connect with Noor Al regarding this effort.

Question: Mendi Murray

In the new guidelines, is HUD outlining that the RAB comes from the Resident Council?

Answer: Tony Ucciferri

Not necessarily. You won't be excluded from participating in the RAB if you don't participate in the Resident Council.

Question: Deborah Drake

What is the expectation of the RAB?

Answer: Tony Ucciferri

Great question. This isn't just a formality. What we need from the RAB is to look at the changes and get a sense of what you like, don't like. Your comments and your thoughts are shared with HUD. The comments we submitted really speak of how the changes cause for families and the issues it may cause, etc. Not necessarily for debate for us, but for us to provide that feedback to HUD. As the recipient of the program and someone with real experience. We encourage you to have a voice in this.

**RAB Meeting
October 10, 2023
RAB Member Questions & Answers**

No Questions. Noor Al Forsland provided an overview and explanation of the summary of changes to the ACOP.

**RAB Meeting
October 17, 2023
RAB Member Questions & Answers**

Question: Mendi Lee

Will you print the changes for us?

Answer: Noor Al Forsland

Of course, please contact Kathy and she will have them for you.

Question: Mendi Lee

I wanted to make a comment.

Our City Council Member for District 1 Tamisha Walker out here recently went to the UN and talked about policies they hoped to be working on. I am looking forward to seeing and getting back with our neighborhood watch. We used to have two commissioners that would come to our site. I am really looking forward to communications and seeing what other programs have been successful in other parts of the Bay Area.

Question: Cynthia Jordan

I was wondering about the back rent that public housing residents didn't pay during Covid. Does the Housing Authority have any means or ideas or suggestions on how they're going to collect those rents.

Answer: Noor Al Forsland

This is a great question. We are trying to figure out exactly this. We recently contacted HUD because rents owed to HUD are not forgivable by the housing authority. In CA, in case you didn't know, you cannot seek damages and rent for more than 12 months. This complicated things for us. We can only go after rents for 12 months. As a commissioner, you were present when our Executive Director reported to the Board on the high number and dollar value of unpaid rents within the program. In Public Housing, we run based on rent and subsidies. The dollars are limited to begin with and when people do not pay, it is very difficult for the operation of the program. We are working with our families to enter into repayment agreements to recover as much as we can but there are a lot of different scenarios we are working with. Our program was income based so any changes in income that were reported would have allowed us to complete an interim recertification.

Question: Cynthia Jordan

So you are working on it then?

Answer: Noor Al Forsland

Yes. Yes, we are.

Question: Cynthia Jordan

You mentioned something about community organizations. I know SOS is that the community organization you are referring to?

Answer: Noor Al Forsland

Yes! It is.

RAB Meeting
October 24, 2023
RAB Member Questions & Answers

Question: JoAnn Segura

How do families go about joining the Home Ownership program?

Answer: Jesse Hunter

Yes, great question. I will share with our public housing team our road maps that are also available on our website for you to view. Families will first join the Family Self Sufficiency program. We partner them with organizations and our counselors and work towards the goal of home ownership. Step 1, is to call us at the FSS team 925-957-7036 or email at FSS@contracostahousing.org.

Ingrid Layne: It is important to note that the overall goal for this is home ownership and overall family self-sufficiency. Important to add that success is not always just home ownership. Through FSS, success is not just home ownership. Every family has different milestones and goals, for example a GED, a new car, etc. and we want to make sure we don't measure our family's success on just home ownership.

Question: Cynthia Jordan

Concerned about Mainstream for the elderly and disabled. I need to know how do I get involved with the Mainstream program. To apply for a voucher, etc. I now have a daughter I need to get into the program and need to know how that will work.

Answer: Jesse Hunter

Mainstream Vouchers are referral based. Typically, they are not waitlist based programs. Usually, they are families that are already in the pipeline. Partner community agencies manage those programs and provide us with the referral for the voucher. To contact the county's Coordinated Entry system, you call 2-1-1.

Ingrid Layne: Reach out to 2-1-1. Before 2-1-1 and the coordinated entry the resources were spread throughout the county. We consolidated the efforts and Coordinated Entry assists us in receiving the families.

Question: James Murray

All this talk about families. What about the single folks?

Answer: Ingrid Layne

Industry language is family. But you as a single household are considered a family.

Question: Mendi Lee

You mentioned transfers. Can public housing transfer to a housing choice voucher?

Answer: Ingrid Layne

No ma'am. There are different waitlists. In the past that did exist. Today, there is a complete division of the programs, the funding, and the administration of the programs. You cannot co-mingle funds even between HAP for payments and the administration fee.

Jesse Hunter: we do have waitlist alerts on our website. It is helpful to sign up for these notifications so that you are the first to know.

Question: Mendi Lee

So, there has been no further talks about the federal government phasing out using the words public housing versus calling it affordable housing?

Answer: Ingrid Layne

Phasing out has been happening for years. Even now, our communities are called developments from projects, etc.

Question: Deborah Drake

Going back to partnership with Kaiser, is that for all public housing or just Section 8.

Answer: Jesse Hunter

It's more specific than that. This program enrollment is specifically for the families within the FSS partnership.

Question: JoAnn Segura

I see that you said John Muir is supposed to be out here in El Pueblo. I never see them. Who do we speak to? When are they here?

Answer: Noor Al Forsland

We just executed the partnership with them. They will be starting in the coming weeks.

Sarah Kangas: Originally, they were supposed to start on Tuesday. They do need additional time because they are working on securing the site. Everyone feels good but there is some work that needs to be done regarding security and logistics.

Question: JoAnn Segura

Are you hiring landscapers? Because we have residents that do this for a living.

Answer: Noor Al Forsland

We are through our Section 3 efforts. We are not hiring just yet but we are working towards this. We are working on connecting interested persons with our vendors who are hiring.

Question: JoAnn Segura

I see all these projects. Are the windows going to be upgraded at El Pueblo?

Answer: Noor Al Forsland

If the window is not operational, we will replace it. Please contact your property manager and they will have someone come out. We are not upgrading windows at this time, though.

Question: James Murray

When we're trying to get together. When is the community center open?

Answer: Noor Al Forsland

It is not open to rent at this time, but you do have a place to meet. Please contact your property manager.

**RAB Meeting
November 21, 2023
RAB Member Questions & Answers**

Question: Cynthia Jordan

If we need \$20m for improvements and HUD is only giving us \$3m, what are we supposed to do with that?

Answer: Tony Ucciferri

Every year, Congress will allot a certain amount of dollars. When they pass the budget, it's competing with all the public programs, the military budget, social security, etc. So, we are doing the best we can to fund our projects. Its not a lot of money for the work we need to do.

Question: Timothy Stelly

Is there any grant writers on staff, like CDBG?

Answer: Tony Ucciferri

We don't, but there are several of us on staff who do this work. Housing Authorities have access to different funding cycles that we apply to.

Question: James Murray

Every year, Congress allocates the money. Who gets the largest portion?

Answer: Tony Ucciferri

I think it's our military budget. But it's all ongoing and kind of fluid. Is not necessarily set in place.



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 23-880

Agenda Date: 12/5/2023

Agenda #: C.1

To: Contra Costa County Housing Authority Board of Commissioners

From: Joseph Villarreal, Executive Director

Date: December 5, 2023

Report Title: 2024 Meeting Schedule

RECOMMENDATIONS:

ADOPT the proposed 2024 meeting schedule for the Housing Authority of the County of Contra Costa Board of Commissioners, which has been coordinated with the Contra Costa County Board of Supervisors and the Contra Costa County Fire Protection District Board of Directors:

March 5th

May 14th

July 9th

September 10th

December 3rd

BACKGROUND:

Each year, the Board of Commissioners adopts a meeting schedule that designates regular meeting dates and any dates on which meetings must be canceled in anticipation that a quorum of the Board will not be present. The proposed meeting schedule provides five meetings for the Board of Commissioners and has been coordinated with the Contra Costa County Board of Supervisors and the Contra Costa County Fire Protection District. The proposed meeting schedule recognizes the time demands on the Board members due to their participation on committees, and numerous regional and local legislative bodies and task forces, which require preparation, attendance, and involve travel. There are legal provisions to schedule a special meeting to address any urgent need that cannot be accommodated in the standing meeting schedule. The 2024 proposed meeting schedule has been prepared in consultation with the incoming Board Chair and the County Administrator and is recommended for the Board's adoption. The Board of Supervisors has already adopted its schedule.

FISCAL IMPACT:

No fiscal impact

CONSEQUENCE OF NEGATIVE ACTION:

Staff will not be able to advance plan for meetings.



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 23-884

Agenda Date: 12/5/2023

Agenda #: C.2

To: Contra Costa County Housing Authority Board of Commissioners

From: Joseph Villarreal, Executive Director

Date: December 5, 2023

Report Title: COLLECTION LOSS WRITE-OFF FOR THE QUARTER ENDING DECEMBER 31, 2023

Recommendation of the County Administrator Recommendation of Board Committee

RECOMMENDATIONS:

ADOPT Resolution No.5257 to approve collection loss write-offs in the public housing program in the amount of \$84,537.42 for the quarter ending December 31, 2023.

BACKGROUND:

The Housing Authority takes action to write off accounts that have been determined to be non-collectible. For this quarter ending December 31, 2023, a breakdown of the recommended write-offs, by housing development, is provided in the following table:

CA011-001	Alhambra Terrace Martinez	\$0
CA011-003	Bridgemont Antioch	\$0
CA011-004	Los Nogales Brentwood	\$7,927.24
CA011 005	El Pueblo Pittsburg	\$41,684.98
CA011-006	Las Deltas N. Richmond	\$0
CA11-008	Los Arboles Oakley	\$0
CA011-009A	Las Deltas N. Richmond	\$0
CA011-009B	Las Deltas N. Richmond	\$0
CA011-010	Bayo Vista Rodeo	\$5,014.85
CA011-011	Hacienda Martinez	\$2,512.83
CA011-012	Casa de Manana Oakley	\$11,559.70
CA011-013	Casa de Serena Bay Point	\$2,868.29
CA011-015	Elder Winds Antioch	\$11,056.80
CA011-4501	Vista del Camino San Pablo	\$1,211.24
CA011-4502	Kidd Manor	\$701.19
TOTAL		\$84,537.42

A total of 27 accounts are being recommended for write-off, representing an average of \$3,131.02 per account.

Prior to submission of an account for write-offs, the staff makes every effort to collect money owed to HACCC. Once the account is written off, staff uploads debt amount to HUD's Debts Owed System, to further Housing Authorities efforts to collect monies owed. Past participants that owe Housing Agencies may be denied admission to public housing or housing choice voucher programs in the future unless debt is repaid.

FISCAL IMPACT:

Uncollectable amounts impact the budget by reducing total rental income. The Housing Authority of the County of Contra Costa (HACCC) regularly writes off those accounts that have been determined to be uncollectable. Once an account is written off, it can be turned over to a collection agency. For the period ending December 31, 2023, the collection loss write-off total is \$84,537.42.

CONSEQUENCE OF NEGATIVE ACTION:

Should the Board of Commissioners elect not to adopt Resolution No.5257 these accounts would inflate the total accounts receivable for HACCC and present and inaccurate financial position.

M E M O R A N D U M

TO: Joseph Villarreal, Executive Director

FROM: Noor Al Forsland, Director of Asset Management

SUBJECT: Vacated Collection Loss Write-Offs

DATE: DECEMBER 5, 2023

I have reviewed the request for Vacated Collection Loss Write-Off Accounts submitted by the Housing Managers and recommend that the following amounts be written off/submitted as non-collectible:

PROJECT	RENT	LEGAL	MAINTENANCE	TOTAL	TENANT ACCOUNTS
Alhambra Terr. Martinez CAL 11-1	\$0.00	-0-	\$0.00	\$0.00	0
Bridgemont, Antioch CAL 11-3	-0-	-0-	-0-	-0-	0
Los Nogales, Brentwood CAL 11-4	-0-	-0-	\$7,927.24	\$7,927.24	1
El Pueblo, Pittsburg CAL 11-5	\$21,143.18	-0-	\$20,541.80	\$41,684.98	6
Las Deltas, N. Richmond CAL 11-6	-0-	-0-	-0-	-0-	0
Los Arboles, Oakley CAL 11-8	-0-	-0-	-0-	-0-	0
Las Deltas, N. Richmond CAL 11-9A	-0-	-0-	-0-	-0-	0
Las Deltas, N. Richmond CAL 11-9B	-0-	-0-	-0-	-0-	0
Bayo Vista, Rodeo CAL 11-10	\$3,172.35	-0-	\$1,842.50	\$5,014.85	7
Hacienda, Martinez CAL 11-11	\$2,412.83	-0-	\$100.00	\$2,512.83	1
Casa de Manana, Oakley CAL 11-12	\$10,635.00	-0-	\$924.70	\$11,559.70	2
Casa de Serena Bay Point CAL 11-13	\$2,868.29	-0-	-0-	\$2,868.29	1
Elder Winds, Antioch CAL 11-15	\$6,045.00	-0-	\$5,011.80	\$11,056.80	3
Vista del Camino San Pablo 4501	\$190.00	-0-	\$1,021.24	\$1,211.24	4
Kidd Manor, San Pablo 4502	\$495.24	-0-	\$206.25	\$701.49	1
TOTALS:	\$46,961.89	-0-	\$37,575.53	\$84,537.42	27

THE BOARD OF COMMISSIONERS
HOUSING AUTHORITY OF THE COUNTY OF CONTRA COSTA

RESOLUTION NO. 5257

RESOLUTION APPROVING COLLECTION LOSS WRITE-OFF IN THE AMOUNT OF \$84,537.42 FOR THE PERIOD ENDING DECEMBER 31, 2023

WHEREAS, a certain vacated tenant accounts have been determined to be uncollectable by management; and

WHEREAS, these tenant accounts may have been, or may be, turned over to a collection agency for continued collection efforts;

NOW, THEREFORE, BE IT RESOLVED, by the Board of Commissioners of the Housing Authority of the County of Contra Costa that the following amounts be written off for collection loss for period ending December 31, 2023

	Conventional Program
Dwelling Rent	\$46,961.89
Legal Charges	\$0
Maintenance & Other Charges	\$37,575.53
TOTAL	\$84,537.42

PASSED AND ADOPTED ON _____ by the following vote of the Commissioners.



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 23-881

Agenda Date: 12/5/2023

Agenda #: C.3

To: Contra Costa County Housing Authority Board of Commissioners

From: Joseph Villarreal, Executive Director

Date: December 5, 2023

Report Title: APPROVE THE PURCHASE OF A COMMERCIAL PROPERTY AT 2601 SOMERSVILLE ROAD IN ANTIOCH, CA FOR THE PURPOSE OF TRANSFORMING IT INTO THE EAST COUNTY OFFICE OF THE HOUSING CHOICE VOUCHER PROGRAM

Recommendation of the County Administrator Recommendation of Board Committee

RECOMMENDATIONS:

APPROVE the purchase of a commercial property at 2601 Somersville Road in Antioch, CA in the amount of \$1,300,000 for the purpose of transforming it into the East County office of the Housing Choice Voucher program.

BACKGROUND:

Over 37% of the households assisted by the Housing Authority's (HACCC) Housing Choice Voucher (HCV) program live in East County. HACCC last had an HCV office in East County in 2012. This office was in converted public housing unit and was closed to offer affordable housing to more families. HACCC has been searching for several years to find a suitable office location in East County.

In 2019, HACCC opened a West County office in San Pablo in conjunction with the transfer of the Richmond Housing Authority's HCV program. The availability of staff and an office closer to their homes greatly improved the ability of West County clients to keep appointments and take care of essential housing issues with HACCC staff.

In September 2020, this Board approved contracting with CBRE Commercial Real Estate Services to represent HACCC in the search for and purchase of two properties: one for an East County HCV office and one for the purchase of a new Central County HCV office as our existing central office is too crowded. We have not yet found a suitable and affordable location for a new Central County office.

2601 Somersville Road was formerly a Wells Fargo bank and has been vacant for some months. The purchase price averages out to approximately \$192 per square foot and is well within the commercial real estate pricing average for office space of \$280 per square foot. The property is 6,778 square feet on 0.71 acres in a well-travelled corridor with access to public transportation close to the office for clients to use. Initially, it is expected that up to twelve staff and supervisors will be located at this office.

FISCAL IMPACT:

The cost of the property will be \$1,300,000 and any related fees, taxes, etc., will be paid out of the Reserve

Account of the Housing Choice Voucher (HCV) program.

CONSEQUENCE OF NEGATIVE ACTION:

If the action to approve the purchase of a commercial property at 2601 Somersville Road in Antioch, CA for the purpose of transforming it into the East County office of the HCV program is not approved, then not only will there not be an HCV presence in East County but there will continue to be an over-crowding situation at the current HCV offices at Howe Road.



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 23-882

Agenda Date: 12/5/2023

Agenda #: C.4

To: Contra Costa County Housing Authority Board of Commissioners

From: Joseph Villarreal, Executive Director

Date: December 5, 2023

Report Title: CONTRACT WITH THE CONTRA COSTA COUNTY SHERIFF'S DEPARTMENT FOR COMMUNITY POLICING SERVICES AT THE BAYO VISTA PUBLIC HOUSING DEVELOPMENT

Recommendation of the County Administrator Recommendation of Board Committee

RECOMMENDATIONS:

APPROVE and AUTHORIZE the Executive Director of the Housing Authority of the County of Contra Costa, or designee, to execute a contract with the Contra Costa County Sheriff's Department in an amount not to exceed \$275,000 to provide the Housing Authority's Bayo Vista public housing development with additional law enforcement services for the period July 1, 2023 through June 30, 2024.

BACKGROUND:

For over twenty-five years, HACCC has contracted with the Contra Costa County Sheriff's Department to provide one full-time Sheriff's Deputy for additional community-oriented policing duties at the Bayo Vista Housing Development in Rodeo. The Deputy focuses on eliminating violent crimes and working closely with the residents to provide services beyond those normally offered by the Sheriff's office.

FISCAL IMPACT:

The Housing Authority's (HACCC) total cost for one-year service will not exceed \$275,000. Funding for this contract is included in HACCC's current budget using the public housing operating subsidy provided by the U. S. Department of Housing and Urban Development.

CONSEQUENCE OF NEGATIVE ACTION:

If the Board of Commissioners does not approve this contract, the Sheriff's department will not have sufficient resources to continue providing additional law enforcement services to the residents of the Bayo Vista public housing community.



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 23-883

Agenda Date: 12/5/2023

Agenda #: C.5

To: Contra Costa County Housing Authority Board of Commissioners

From: Joseph Villarreal, Executive Director

Date: December 5, 2023

Report Title: CONTRACT WITH THE CITY OF PITTSBURG POLICE DEPARTMENT FOR COMMUNITY POLICING SERVICES AT THE EL PUEBLO PUBLIC HOUSING DEVELOPMENT IN THE CITY OF PITTSBURG

Recommendation of the County Administrator Recommendation of Board Committee

RECOMMENDATIONS:

APPROVE and AUTHORIZE the Executive Director of the Housing Authority of the County of Contra Costa, or designee, to execute a contract with the City of Pittsburg in an amount not to exceed \$180,000 to provide the Housing Authority's El Pueblo public housing development with additional law enforcement services for the period July 1, 2022 through June 30, 2023.

BACKGROUND:

For the past twenty-four years (or more), HACCC has contracted with the City of Pittsburg to provide one full-time police officer for additional community-oriented policing duties at the El Pueblo Housing Development. The officer focuses on eliminating drug-related activities, eliminating violent crimes, and working closely with residents to provide services beyond those normally offered by the police.

FISCAL IMPACT:

The Housing Authority's (HACCC) total cost for one year's service will not exceed \$180,000. Funding for this contract is included in HACCC's current budget using the public housing operating subsidy provided by the U. S. Department of Housing and Urban Development.

CONSEQUENCE OF NEGATIVE ACTION:

If the Board of Commissioners does not approve this contract, the City of Pittsburg will not have sufficient resources to continue providing additional law enforcement services to the residents of the El Pueblo public housing community.



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 23-1012

Agenda Date: 12/5/2023

Agenda #: C.6

To: Contra Costa County Housing Authority Board of Commissioners

From: Joseph Villarreal, Executive Director

Date: December 5, 2023

Report Title: INVESTMENT REPORT FOR THE QUARTER ENDING SEPTEMBER 30, 2023

Recommendation of the County Administrator Recommendation of Board Committee

RECOMMENDATIONS:

RECEIVE the Housing Authority of the County of Contra Costa's investment report for the quarter ending September 30, 2023.

BACKGROUND:

California Government Code (CGC) Section 53646 requires the Housing Authority of the County of Contra Costa (HACCC) to present the Board of Commissioners with a quarterly investment report that provides a complete description of HACCC's portfolio. The report is required to show the issuers, type of investments, maturity dates, par values (equal to market value here) and the current market values of each component of the portfolio, including funds managed by third party contractors. It must also include the source of the portfolio valuation (in HACCC's case it is the issuer). Finally, the report must provide certification that (1) all investment actions executed since the last report have been made in full compliance with the Investment Policy and; (2) HACCC will meet its expenditure obligations for the next six months. (CGC 53646(b)).

The state-mandated report has been amended to indicate the amount of interest earned and how the interest was allocated. The amended report is attached.

In summary, HACCC had \$22,231.95 in interest earnings for the quarter ending September 30th, 2023. That interest was earned within discrete programs and most of the interest earned is available only for use within the program which earned the interest. Further, interest earnings may be restricted to specific purposes within a given program.

The Housing Choice Voucher Program reserve as of 12/31/2013 held in cash and investments was transitioned to HUD held program reserve account.

Non-restricted interest earnings within both the voucher and public housing programs must be used solely within those programs, but such interest earnings can be used for a wider range of purposes within the individual programs. The interest earned in the State and Local fund can be used for any purpose within HACCC's scope of operations.

The interest earned for the quarter ending September 30th, 2023 is shown below. A more detailed report is attached.

Public Housing	Housing Choice Voucher		Central Office	State & Local
Unrestricted Interest Earned	Restricted Interest Earned	Unrestricted Interest Earned	Unrestricted Interest Earned	Unrestricted Interest Earned
\$15,174.43			\$2,311.86	\$4,745.66

FISCAL IMPACT:

None. For reporting purposes only.

CONSEQUENCE OF NEGATIVE ACTION:

Should the Board of Commissioners elect not to accept the investment report it would result in an audit finding of non-compliance and could ultimately affect future funding from the U.S. Department of Housing and Urban Development (HUD).

**HOUSING AUTHORITY OF CONTRA COSTA COUNTY
INVESTMENT REPORT : PORTFOLIO HOLDINGS BY TYPE**

For Period Ending: 9/30/2023

Issuer	Investment Type	Amount Invested	Yield	Investment Date	Maturity Date	Estimated Value@ Maturity Date
<u>Cantella & Company</u>						
Fidelity Market Reserves	Money Market	41,577.65	4.460%	ongoing	ongoing	41,577.65
Citi Bank NA	Certificate of Deposit	145,000.00	3.000%	2/15/19	2/15/24	166,761.92
Morgan Stanley Private Bank	Certificate of Deposit	160,000.00	2.200%	7/25/19	7/25/24	177,619.29
State Bank of India	Certificate of Deposit	140,000.00	1.100%	5/28/20	5/28/25	147,704.22
Texas Exchange Bank	Certificate of Deposit	105,000.00	1.000%	6/19/20	6/19/25	110,252.88
State Bank of India	Certificate of Deposit	105,000.00	1.000%	4/27/21	4/27/26	110,252.88
Sally Mae Bank	Certificate of Deposit	75,000.00	1.050%	9/23/21	9/22/26	78,937.50
Synchrony Bank	Certificate of Deposit	100,000.00	0.950%	9/24/21	9/24/26	104,752.60
Federal Home Loan bank	Govt Agency	115,000.00	1.350%	1/27/22	1/27/26	121,214.25
Federal Home Loan bank	Govt Agency	110,000.00	1.750%	2/04/22	1/27/27	119,588.08
American Express national Bank	Certificate of Deposit	247,000.00	2.000%	3/09/22	3/09/27	271,713.53
Capital One Bank, USA	Certificate of Deposit	230,000.00	2.250%	3/23/22	3/23/27	255,889.18
Ally Bank	Certificate of Deposit	220,000.00	3.100%	5/19/22	5/09/25	240,291.84
BMO Harris Bank	Certificate of Deposit	150,000.00	3.300%	6/15/22	6/15/27	174,763.56
Morgan Stanley Bank	Certificate of Deposit	150,000.00	3.750%	6/30/22	6/30/27	178,140.41
Discover Bank	Certificate of Deposit	140,000.00	3.300%	7/20/22	7/20/26	158,492.66
Sallie Mae Bank	Certificate of Deposit	173,000.00	3.300%	7/20/22	7/21/25	190,158.28
Federal Home Loan bank	Govt Agency	150,000.00	4.000%	9/02/22	8/25/27	179,884.93
Capital One NA	Certificate of Deposit	245,000.00	4.300%	9/30/22	9/30/27	297,703.86
CIBC Bank USA	Certificate of Deposit	150,000.00	4.350%	5/16/23	5/15/28	182,642.88
Texas Trust Credit Union	Certificate of Deposit	150,000.00	5.000%	8/09/23	8/09/27	180,020.55
Greenstate Credit Union	Certificate of Deposit	130,000.00	5.000%	8/29/23	8/29/28	162,535.62
GRAND TOTALS		3,231,577.65				3,650,898.56

L.A.I.F. (Acct # 25-07-003)	Liquid Account	111,467.83	3.59%	ongoing	ongoing	111,467.83
GRAND TOTALS		3,343,045.48				3,762,366.39

HOUSING AUTHORITY OF CONTRA COSTA COUNTY

INVESTMENT REPORT BY FUND

For Period Ending 9/30/2023

Issuer	Amount Invested	Amount Invested by Fund:				
		Public Housing	Management	Central Office	Housing Choice Voucher	Rental Rehabilitation
<u>Cantella & Company</u>						
Fidelity Market Reserves	41,577.65	16,901.60	8,569.71	16,106.34		
.....						
Citi Bank NA	145,000.00			145,000.00		
Morgan Stanley Private Bank	160,000.00		-	160,000.00		
State Bank of India	140,000.00		140,000.00			
Texas Exchange Bank	105,000.00		105,000.00			
State Bank of India	105,000.00	105,000.00				
Sally Mae Bank	75,000.00	-		75,000.00		
Synchrony Bank	100,000.00	100,000.00				
Federal Home Loan bank	115,000.00	115,000.00				
Federal Home Loan bank	110,000.00	110,000.00				
American Express national Bank	247,000.00	247,000.00				
Capital One Bank, USA	230,000.00	230,000.00				
Ally Bank	220,000.00	220,000.00				
BMO Harris Bank	150,000.00	150,000.00				
Morgan Stanley Bank	150,000.00	150,000.00				
Discover Bank	140,000.00	140,000.00				
Sallie Mae Bank	173,000.00		173,000.00			
Federal Home Loan bank	150,000.00	150,000.00				
Capital One NA	245,000.00	245,000.00				
CIBC Bank USA	150,000.00		150,000.00			
Texas Trust Credit Union	150,000.00	150,000.00				
Greenstate Credit Union	130,000.00	130,000.00				
GRAND TOTALS	3,231,577.65	2,258,901.60	576,569.71	396,106.34	-	-
L.A.I.F. (Acct # 25-07-003)	111,467.83	-	-	-		111,467.83
GRAND TOTALS	3,343,045.48	2,258,901.60	576,569.71	396,106.34	-	111,467.83

HOUSING AUTHORITY OF CONTRA COSTA COUNTY

Report per CGC 53646 CURRENT MARKET VALUE

For Period Ending 9/30/2023

Issuer	Investment Type	Maturity Date	Amount Invested	Current Market Value (at 9/30/23)	Yield
Cantella & Company					
Fidelity Market Reserves	Money Market	ongoing	41,577.65	41,577.65	4.46%
Citi Bank NA	Certificate of Deposit	2/15/2024	145,000.00	143,645.70	3.00%
Morgan Stanley Private Bank	Certificate of Deposit	7/25/2024	160,000.00	155,614.40	2.20%
State Bank of India	Certificate of Deposit	5/28/2025	140,000.00	130,060.00	1.10%
Texas Exchange Bank	Certificate of Deposit	6/19/2025	105,000.00	97,066.20	1.00%
State Bank of India	Certificate of Deposit	4/27/2026	105,000.00	93,853.20	1.00%
Sally Mae Bank	Certificate of Deposit	9/22/2026	75,000.00	66,123.00	1.05%
Synchrony Bank	Certificate of Deposit	9/24/2026	100,000.00	87,873.00	0.95%
Federal Home Loan bank	Govt Agency	1/27/2026	115,000.00	105,262.95	1.35%
Federal Home Loan bank	Govt Agency	1/27/2027	110,000.00	98,734.90	1.75%
American Express national Bank	Certificate of Deposit	3/09/2027	247,000.00	221,393.51	2.00%
Capital One Bank, USA	Certificate of Deposit	3/23/2027	230,000.00	207,759.00	2.25%
Ally Bank	Certificate of Deposit	5/09/2025	220,000.00	211,398.00	3.10%
BMO Harris Bank	Certificate of Deposit	6/15/2027	150,000.00	139,963.50	3.30%
Morgan Stanley Bank	Certificate of Deposit	6/30/2027	150,000.00	142,249.50	3.75%
Discover Bank	Certificate of Deposit	7/20/2026	140,000.00	132,314.00	3.30%
Sallie Mae Bank	Certificate of Deposit	7/21/2025	173,000.00	166,197.64	3.30%
Federal Home Loan bank	Govt Agency	8/25/2027	150,000.00	143,070.00	4.00%
Capital One NA	Certificate of Deposit	9/30/2027	245,000.00	236,694.50	4.30%
CIBC Bank USA	Certificate of Deposit	5/15/2028	150,000.00	144,315.00	4.35%
Texas Trust Credit Union	Certificate of Deposit	8/09/2027	150,000.00	148,590.00	5.00%
Greenstate Credit Union	Certificate of Deposit	8/29/2028	130,000.00	128,338.60	5.00%
			3,231,577.65	3,042,094.25	
L.A.I.F. (Acct # 25-07-003)	Liquid Account	ongoing	111,467.83	111,467.83	3.59%
GRAND TOTALS			3,343,045.48	3,153,562.08	

HOUSING AUTHORITY OF CONTRA COSTA COUNTY

Investment Interest Earnings Report

For Period Ending 9/30/2023

150189	Amount Invested	Interest Earned this Qtr	Interest Earned this Quarter by Fund				
			Public Housing	Management	Central	Rental Rehab	Housing Voucher
			Unrestricted	Unrestricted	Unrestricted	Unrestricted	Unrestricted
<u>Cantella & Company</u>							
Fidelity Market Reserves	41,577.65	457.24	185.87	94.24	177.13	-	-
Citi Bank NA	145,000.00	1,072.60	-	-	1,072.60	-	-
Morgan Stanley Private Bank	160,000.00	867.95	-	-	867.95	-	-
State Bank of India	140,000.00	379.73	-	379.73	-	-	-
Texas Exchange Bank	105,000.00	258.90	-	258.90	-	-	-
State Bank of India	105,000.00	258.90	258.90	-	-	-	-
Sally Mae Bank	75,000.00	194.18	-	-	194.18	-	-
Synchrony Bank	100,000.00	234.25	234.25	-	-	-	-
Federal Home Loan bank	115,000.00	382.81	382.81	-	-	-	-
Federal Home Loan bank	110,000.00	474.66	474.66	-	-	-	-
American Express national Bank	247,000.00	1,218.08	1,218.08	-	-	-	-
Capital One Bank, USA	230,000.00	1,276.03	1,276.03	-	-	-	-
Ally Bank	220,000.00	1,681.64	1,681.64	-	-	-	-
BMO Harris Bank	150,000.00	1,220.55	1,220.55	-	-	-	-
Morgan Stanley Bank	150,000.00	1,386.99	1,386.99	-	-	-	-
Discover Bank	140,000.00	1,139.18	1,139.18	-	-	-	-
Sallie Mae Bank	173,000.00	1,407.70	-	1,407.70	-	-	-
Federal Home Loan bank	150,000.00	1,479.45	1,479.45	-	-	-	-
Capital One NA	245,000.00	2,597.67	2,597.67	-	-	-	-
CIBC Bank USA	150,000.00	1,608.90	-	1,608.90	-	-	-
Texas Trust Credit Union	150,000.00	1,068.49	1,068.49	-	-	-	-
Greenstate Credit Union	130,000.00	569.86	569.86	-	-	-	-
-	3,231,577.65	21,235.76	15,174.43	3,749.47	2,311.86	-	-
L.A.I.F. (Acct # 25-07-003)	111,467.83					996.19	
GRAND TOTALS	3,343,045.48	22,231.95	15,174.43	3,749.47	2,311.86	996.19	-