

**AFFORDABLE HOUSING ADVISORY COMMITTEE**  
**LOCATION: ROOM 2000**  
**CITY HALL**  
**THURSDAY, OCTOBER 2, 2014 7:00PM**

**AHAC AGENDA**

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|--|-----------|
| 1. Consideration of previous meeting minutes June 5 and 19, 2014   | 7:00 p.m. |
| 2. Consideration of Picket Place Affordable Housing Plan   | 7:05 p.m. |
| 3. Presentation "Bursting the Bubble: The challenges of working and living in the national capital region" Jeff Connor Naylor, TCI | 7:30 p.m. |
| 4. Consideration of Housing Master Plan Targets Report, FY 2014  | 8:00 p.m. |
| 5. Beauregard Update and Amendment to Beauregard Committed Affordable Unit Priority Groups   | 8:15p.m.  |
| 6. Update regarding Oakville Triangle/Route 1 Corridor Planning Initiative   | 8:25p.m.  |
| 7. Information Items:  | 8:30 p.m. |
| a) Housing Trust Fund Financial Summary for August 2014  |           |
| b) Housing Opportunities Fund Financial Status for August 2014   |           |
| c) Homeownership Programs Report for August 2014   |           |
| d) Tax and Bond Report for August 2014   |           |
| 8. Announcements and Upcoming Housing Meetings   | 8:35 p.m. |
| 9. Adjournment   | 8:40 p.m. |

**AFFORDABLE HOUSING ADVISORY COMMITTEE**  
**Minutes of the June 5, 2014**

Members Present

John Catlett  
Bill Harris  
Eric Weiss  
Robyn Konkel  
Edric Kirkman  
Katharine Dixon  
Carter Flemming  
Rick Liu  
Mildrilyn Davis (non-voting)

Staff Present

Jon Frederick  
Mildrilyn Davis  
Helen McIvaine

Guests

The meeting was called to order by Katharine Dixon, Chair

Reviewed and approved AHAC Annual Report

Review of the Housing Master Plan 2,000 Unit Status Report. Discussion occurred around the issue of the meaning of funded vs completed.

The staff asked for a special meeting to discuss a Habitat for Humanity funding request letter in the month. Committee members agreed to hold a special meeting.

Katherine Dixon adjourned the meeting

Minutes submitted by Staff

#13

**AFFORDABLE HOUSING ADVISORY COMMITTEE**  
**Minutes of the June 19, 2014 Special Meeting**

Members Present

John Catlett  
Bill Harris  
Eric Weiss  
Robyn Konkel  
Joe Ouellette  
Michael Butler  
Edric Kirkman  
Katharine Dixon  
Mildrilyn Davis (non-voting)

Staff Present

Jon Frederick  
Mildrilyn Davis

Guests

Jon Smoot

The meeting was called to order by Katharine Dixon, 7:02pm.

1. Katharine D re-introduced the HOF funding allocation to Habitat for Humanity/NoVa and reviewed how the funding would transition from a rehab loan to Habitat into payment assistance to the new homebuyer. Habitat agreed that the sales price of the refurbished unit would be affordable to a buyer at 80% AMI or below. Many questions arose from committee members: cost basis, sweat equity, period of affordability. If Habitat doesn't use all \$50,000, it will be returned to the City. Profit from the sale of this property will be used by Habitat to build 6 new affordable townhomes on Stevenson Avenue. Bill H motioned to approve, John C seconded. All in favor.
2. Joe O requested greater transparency on applicant's proposals, subsequently providing AHAC greater transparency of information for discussion.
3. Mildrilyn D presented a draft of a Beauregard Relocation Priority change: establishing priorities 1A and 1B and 2. Committee members to discuss it in the fall but in general agreed with the proposed change.

Dixon adjourned the meeting at 7:55pm.

Minutes submitted by Katherine Dixon

#4

# City of Alexandria, Virginia

## MEMORANDUM

DATE: SEPTEMBER 25, 2014

TO: AFFORDABLE HOUSING ADVISORY COMMITTEE

FROM: MILDRILYN STEPHENS DAVIS, DIRECTOR, OFFICE OF HOUSING *msd*

SUBJECT: CONSIDERATION OF HOUSING MASTER PLAN TARGETS REPORT, FY 2014

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**ISSUE:** Report on FY 2014 progress toward Housing Master Plan goal of 200 units from FY 2014 through FY 2025.

**RECOMMENDATION:** That the Committee approve the report table and the transmission of the report to City Council.

**DISCUSSION:** When City Council approved the Housing Master Plan in December 2013, it also established a goal of 2000 affordable housing units by 2025. During previous discussions with Council about targets, staff presented options in the form of tables showing a combination of units of various types that could be achieved with various levels of funding. In planning for the 2000 units, for which no additional funding has been provided to date, staff has prepared a report (Attachment 1) in a format similar to that of the options proposed to Council.

Staff presented a version of this report (which has since been slightly modified) to the Committee on June 5. In response to the Committee's request at that meeting, staff has also provided a hypothetical FY 2015 report (Attachment 2) with estimated data, in order to show how the data would be populated in a multi-year report.

Attachment 1 shows that in order to reach the goal of 2000 units by the end of FY 2025, we need to achieve an average of 167 units (of various types) per year. As of the end of FY 2014, there were 22 completed units of various types and 129 units approved or funded, pending completion. The 129 approved units pending completion are as follows:

- 103 rental production units
  - Lynhaven Apartments rehabilitation – 28 units
  - Arbelo/Longview refinancing and rehabilitation – 75 units
- 26 units pledged through the development process
  - Slater's Lane – 2 units
  - Hunting Terrace – 24 units

The 22 completed units were assisted under the following programs:

- Rental Accessibility Modification Program (RAMP) – 3 units
- Flexible Homeownership Program – 4 units
- Home Rehabilitation Loan Program – 15 units

Attachment II reflects how the report would look with two years of data, including units approved in FY 2014 that were not yet completed in FY 2016. This is especially likely to occur (as shown) with units pledged through the development process, which normally are not completed until 3 or more years after development approval.

### Housing Master Plan Targets - Progress Through 2014

	Targets			Accomplished				Remaining Years		Budget	
	FY2014-25	Per Fiscal Year (FY)	FY2014 Pending Completion		Completed		Cumulative		FY2015-25		Average Per Fiscal Year FY2015
			Approved/ Funded this FY	Approved/ Funded Prior FY	Completed	Completed	Approved/ Funded Pending Completion	Completed			
Rental Production	660	55	103	0	0	0	103	0	557	56	92
Rental Accessibility	24	2	0	0	3	3	0	3	21	2	3
Homebuyers	72	6	0	0	4	4	0	4	68	7	9
Homeowner Rehab	240	20	0	0	15	15	0	15	225	23	19
Development Process	336	28	26	0	0	0	26	0	310	31	28
Beauregard Committed Units	494	41	0	0	0	0	0	0	494	49	66
ARHA Redevelopment Support	175	15	0	0	0	0	0	0	175	18	0
<b>Totals</b>	<b>2,000</b>	<b>167</b>	<b>129</b>	<b>0</b>	<b>22</b>	<b>22</b>	<b>129</b>	<b>22</b>	<b>1,851</b>	<b>185</b>	<b>217</b>

## DRAFT HYPOTHETICAL FY 2015 REPORT

### Housing Master Plan Targets - Progress Through 2015

	Targets		Accomplished				Remaining Years		Budget	
	FY2014-25	Per Fiscal Year (FY)	Pending Completion		FY2015		Completed	FY2016-25		
			Approved/ Funded this FY	Approved/ Funded Prior FY	Completed	Approved/ Funded Pending Completion				
Rental Production	660	55	92	28	75	120	75	437	44	TBD
Rental Accessibility	24	2	2	0	1	0	4	20	2	TBD
Homebuyers	72	6	0	0	9	0	13	59	6	TBD
Homeowner Rehab	240	20	0	0	19	0	34	206	21	TBD
Development Process	336	28	24	26	0	50	0	260	26	TBD
Beauregard Committed Units	494	41	0	0	0	0	0	494	49	TBD
ARHA Redevelopment Support	175	15	0	0	0	0	0	175	18	TBD
<b>Totals</b>	<b>2,000</b>	<b>167</b>	<b>118</b>	<b>54</b>	<b>104</b>	<b>170</b>	<b>126</b>	<b>1,652</b>	<b>165</b>	<b>0</b>



#5

Legislation Text

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File #: 14-3107, Version: 1

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City of Alexandria, Virginia

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MEMORANDUM

**DATE:** SEPTEMBER 17, 2014

**TO:** THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL

**FROM:** RASHAD M. YOUNG, CITY MANAGER/s/

**DOCKET TITLE:**

Consideration of Amendments to the Beauregard Tenant Assistance and Relocation Plan.

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**ISSUE:** Consideration of changes to the Tenant Assistance and Relocation Plan (TARP) to reflect additional priority for Committed Affordable Units (CAU) for tenants in receipt of 120-day notice to vacate in order to give highest priority to households facing imminent displacement, and to authorize administrative approval of future amendments to the TARP.

**RECOMMENDATION:** That City Council:

- 1) Approve Levels A and B within Priority I and Priority II categories; and
  - Level A will be assigned to those households in each Priority category who are in receipt of a 120-day notice to vacate; and
  - Level B will be assigned to the remaining households in each Priority category.
- 2) Authorize administrative approval for amendments to the TARP when necessary after consultation with Participating Developers, CAU applicants from the Plan Area, the Landlord Tenant Relations Board, and the Affordable Housing Advisory Committee.

**BACKGROUND:** On April 13, 2013, City Council approved the Beauregard Tenant Assistance and Relocation Plan as part of Coordinated Development Districts (CDDs) #21 and #22 of the Beauregard Small Area Plan. The TARP is applicable to units to be demolished in the Beauregard Small Area Plan and offers enhanced services to households displaced by redevelopment in accordance with the Beauregard Small Area Plan.

The City's Office of Housing is responsible for policy and implementation related to identification, prioritizing and placement of Households in CAUs. CAUs are long-term affordable replacement units developed pursuant to an agreement between the City and the Beauregard Small Area Plan's Participating Developers. Those

Households who occupy units to be demolished and whose incomes do not exceed 75% of the Area Median Income (AMI) are eligible to be considered for CAUs.

The approved TARP includes two levels of priority for income eligible households in determining the order of placement in CAUs. Priority I Households must have lived in a unit identified for demolition on May 12, 2012 when the Beauregard Small Area Plan was approved by City Council and were still living in a unit in one of these properties on April 13, 2013 when Council approved rezoning amendments for the Small Area Plan. All Priority I Households will be assisted within each bedroom size prior to offering CAUs to other Households on the wait list.

Priority II Households are residents of a redevelopment property who moved into that property after May 12, 2012 and who live in a unit identified for demolition as of the date of approval of a DSUP that will result in the demolition of their unit or will otherwise displace the Household as a result of the approved DSUP.

Priority I and Priority II Households are assigned points as shown below. For the purpose of allocating CAUs, all Priority I Households will be considered (for a given unit size) before any Priority II Households are considered.

Criteria	Points
Household lives in unit to be demolished at the time of approval of the DSUP*	11
Income @ or below 40% AMI	2
Child or children in Ramsay, John Adams, or Polk Elementary School	2
62 or older and/or has a disability	2
Lived in the plan area for more than three years	1**
OR Lived in the plan area for more than 10 years	2*
Primary place of employment is within two miles of the plan area	1
Has been relocated during a prior phase	1

\*When Households are relocated to subsequent phases, the Household will maintain these points after the move.

\*\*No more than two points for longevity.

**DISCUSSION:** Staff proposes to divide each Priority category into levels A and B. Level A will be assigned to tenants within each Priority category who have received 120-day notice to vacate. Level B will be assigned to the remaining Priority I and Priority II households. This change will be relevant when redevelopment is being done in phases under the same DSUP. In a phased redevelopment, all households in units under the approved DSUP will be eligible for 11 additional points. However, not all will be given notice to vacate at the same time, and in some cases the time between phases could be years. The proposed amendment to the TARP will allow CAUs to be offered to households within each Priority category facing imminent displacement prior to neighbors living in buildings that will not be affected until subsequent phases of the development. The additional priority status change to Priority IA and IIA will last only for the duration of the 120-day notice to vacate.

In addition, staff seeks authorization from Council for administrative approval of future changes (City Manager's Office approval) to the Tenant Assistance and Relocation Plan after consultation with Participating Developers, CAU applicants from the Plan Area, the Landlord Tenant Relations Board and the Affordable Housing Advisory Committee.

The proposed amendments have been discussed with tenants from the Beauregard Small Area Plan. The Affordable Housing Advisory Committee on June 19, 2014 expressed general support for the establishment of a higher priority level for households with 120-day notices, and the Landlord Tenant Relations Board approved

the amendments on September 3, 2014.

**FISCAL IMPACT:**

None.

**ATTACHMENTS:**

1. Beaugard Tenant Assistance and Relocation Plan
2. Summary of Changes

**STAFF:**

Mark Jinks, Deputy City Manager

Mildrilyn Davis, Director, Office of Housing

Melodie Seau, Division Chief, Landlord/Tenant Relations, Office of Housing

Caridad Palerm, Relocation Advisor, Office of Housing

**BEAUREGARD SMALL AREA PLAN  
TENANT ASSISTANCE AND RELOCATION PLAN  
FOR PROPERTIES SCHEDULED TO BE DEMOLISHED**

The Tenant Assistance and Relocation Plan applies to units to be demolished in the Beauregard Small Area Plan. Participating Developers will provide relocation assistance to displaced Households at the time of redevelopment in accordance with this Plan. This Plan offers enhanced services to Households displaced by redevelopment in accordance with the Beauregard Small Area Plan.

Participating Developers will provide a Relocation Coordinator (Coordinator) sixty days prior to the delivery of 120-day notices to terminate tenant leases at each redevelopment site. The Coordinator may be a third party, new hire or member of existing staff, developers with multiple properties may designate a Coordinator for more than one development, and more than one Participating Developer may share a Coordinator, at the Participating Developers' discretion. The Coordinator will be responsible for coordination and implementation of the Tenant Assistance and Relocation Program for that property or properties in coordination with the City's Office of Housing. The Coordinator will be available on site, during regular hours and by appointment, to provide assistance and information to residents as set forth herein. Services will be provided until all Households in units to be demolished during that particular redevelopment phase have been relocated.

The relocation process will include two distinct but concurrent processes:

1. Identification of eligible Households, prioritizing and placement of displaced Households in available Committed Affordable Unit (CAU)s.
2. Relocation (monetary payment and referral/placement assistance) of displaced Households.

The City's Office of Housing will be responsible for policy and implementation related to identification, prioritizing and placement of Households in Committed Affordable Units (CAUs). Participating Developers will be responsible for referrals/placement assistance, monetary assistance, notice to displaced Households, and for providing survey information to the City regarding Households to be displaced.

**Definitions**

*A "Household"* is defined as consisting of all persons listed on the lease and their dependent children.

*"Committed Affordable Units"* are long-term affordable replacement units developed pursuant to agreement with the City for Beauregard Small Area Plan. Rents and rent increases for these units will be established in accordance with specified maximum income levels.

*"Comparable Units"* are units made available to displaced Households that are comparable in size and rent to units from which the Household is displaced. There is no restriction on rent increases for these units.

*"Participating Developers"* are the owners of the Southern Towers Berkeley Building and the units to be demolished in the residential neighborhoods of Seminary Overlook, The Town Center, Garden District and Greenway.

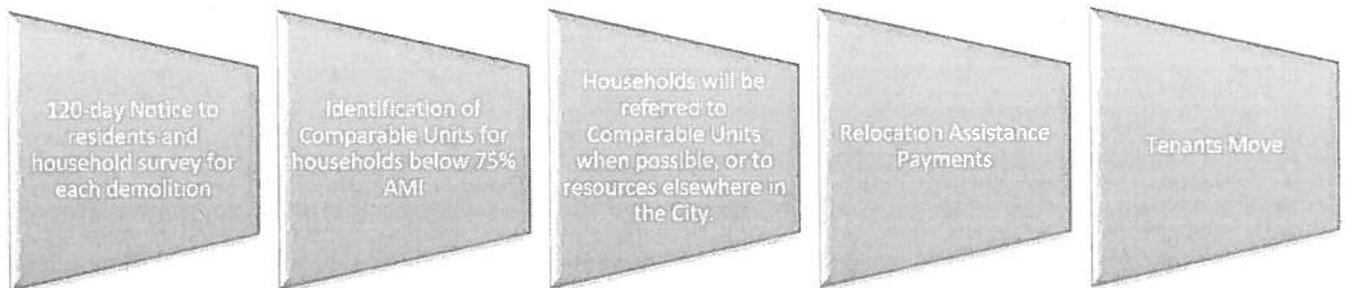
**“Reasonable Criminal Background Screening Policy”** A criminal background screening policy which is not overly broad, does not exclude everyone with a criminal record, does not rely solely on arrest records (without convictions), and which provides a process for considering mitigating circumstances.

**“Preapproved Tenants or Households in Good Standing”** are defined as those Households that satisfy all of the following criteria:

- 1) Are current in rent at the time of receipt of 120-day notice to terminate tenancy.
- 2) Have lived in a unit owned by a Participating Developer for more than 12 consecutive months immediately prior to relocation.
- 3) Have not made more two late rental payments (paid more than ten days after the due date) during the last twelve months of the tenancy.
- 4) Have received no more than one 21/30-day notice to cure during the last two years; and all violations were cured without further notice from the landlord.
- 5) Have not been served a Summons for Unlawful Detainer for non-payment of rent that was not dismissed on or before the first return date at any time within the last year. An exception will be granted to any Household that has been current in rental payments for at least 18 months after receiving emergency rental assistance from the City’s Department of Community and Human Services.
- 6) Have passed a criminal background check based on Reasonable Criminal Background Screening Policy as defined herein.

**“Households Eligible for Relocation Assistance Payments”** are defined as all displaced Households current with rent will receive relocation assistance payments regardless of income and/or certification as a Preapproved Household in Good Standing as defined above.

### **Relocation of Displaced Households – Developer’s Relocation Coordinator(s)**



### **Relocation of Displaced Households**

Relocation of displaced Households will begin prior to demolition and will be considered completed after all displaced Households are relocated or choose to move without availing themselves of the assistance from the Coordinator. The Coordinator will have responsibility for assisting Households with relocation during this process as set forth below in coordination with the Office of Housing.

## **Communication and Notice**

The Participating Developer will deliver written preliminary notice of the proposed redevelopment plan and upcoming relocation activities to Households living in units to be demolished as part of that plan at least 9 months prior to demolition. This notice will explain the projected timing of demolition and relocation activities, contact information for the Coordinator or management staff available to answer questions prior to hiring a coordinator, and a description of services that will be available during relocation activities. In coordination with the Alexandria City Public Schools (ACPS), information regarding ACPS's policies about student transfers (within the school district) and resources available to support transferring students will also be provided. The preliminary notice will be delivered by regular mail and hand delivery. The information provided with the preliminary notice will also be posted online on the City's website. "In addition to the standard community engagement process associated with the DSUP applications, the applicants agree to provide an estimated timeline of the process to tenants who will be displaced by that phase of development and hold a meeting with those tenants at the time of the filing of the DSUP."

In addition to the preliminary notice, a second notice in compliance with Section 55-222 of the Code of Virginia will be given at least 120-days prior to lease termination. To ensure that residents understand the process and can participate in planning for their future, Coordinators will translate written notices into Spanish, provide Spanish language interpreters at tenant meetings and make AT&T Language Line or comparable services available for meetings with the Coordinator and property management staff. Copies of all 120-day Notices will be sent to the Office of Housing when issued to tenants.

## **Survey of Residents in Units to be Demolished**

Prior to issuing the 120-day notice, the Participating Developer will survey affected residents regarding their Household's composition, income and any special considerations (i.e., need for accessible unit). Survey information will be provided to the City at least six months prior to termination of tenancies and demolition. Participating Developers will cooperate with the City in making reasonable efforts, (which shall herein be defined as three attempts to obtain a survey response either by mail or in person, including efforts to survey residents during non-working hours.) to reach affected residents. If residents do not respond to the survey after reasonable efforts, Participating Developers will provide available information regarding the Household to the City. Participating Developers will also provide documentation to the City of their outreach efforts to those Households who did not respond to the Survey. The Survey will include contact information for the City's Office of Housing and any other organization identified by the Office of Housing. Survey information collected should be provided to the City by the time the 120-day notices are issued.

## **Referral to Comparable Units**

Reasonable effort will be made to refer Households in Good Standing with incomes not exceeding 75% AMI to an available Comparable Unit in the Plan area. If no such unit is available, the Coordinator will provide referrals to units elsewhere within the City.

Whenever 120-day notices are issued for any Participating Developer units, all Participating Developers will be responsible for providing and regularly updating availability information to the Coordinator throughout the 120-day period to ensure that all Households in Good Standing receive a complete, accurate and current list of available Comparable Units. If more than one Coordinator is managing relocation concurrently, Participating Developers will establish a process for cooperation between their Coordinators to ensure that the same listing is provided to all Households during the notice period.

Coordinators will maintain data regarding all Households that they are responsible for assisting with relocation as well as a database of available units and upcoming vacancies in the Plan. The Coordinator will refer Households with incomes up to 75% AMI to units that are comparable in size and rent to the Household's current unit at the time of relocation by providing a list of Comparable Units within the Plan area to the relocating Household upon request. Households in Good Standing will be eligible for a Comparable Unit until such time as they relocate from their existing unit, which shall be no later than 120 days from the 120-day notice to vacate. If a relocated Household is again displaced from a subsequent phase of redevelopment, the Household will again be eligible for a comparable unit if the Household is in Good Standing at that time.

The Coordinator will provide Preapproved Households in Good Standing with a letter certifying the Household's eligibility as a Preapproved Household in Good Standing as defined herein. Participating Developers may have certification of Preapproved Households in Good Standing provided through the services of a third party contractor at no cost to the Household.

After certification as a Preapproved Household in Good Standing, the Household will be offered an available Comparable Unit on the list of available units of all Participating Developers. If none of the Comparable Units on the list provided by the Coordinator are available after the Household has contacted property management for the listed units with appropriate sizes and rents, the Household should contact the Coordinator who will provide an updated list of available units within the Plan area and/or a list of available units elsewhere in the City. A Household not certified as a Preapproved Household in Good Standing will be notified in writing of the reason for the adverse action and will advise tenants of any third party agency which performed the screening and/or the resulting determination. If the reason for the determination is the result of a criminal background check, the Household will be notified of the process for consideration of mitigating circumstances. A Household that has not been certified as a Preapproved Household in Good Standing may apply for a Comparable Unit subject to the Participating Developer's standard screening criteria. These Households will not be promised available units and will have no more priority than any member of the general public if accepted for tenancy. The Coordinator will provide the City with the list of available units upon request.

The Coordinator will maintain information regarding other committed affordable housing resources nearby and throughout the City, as well as information and referrals to other multifamily rental properties. City staff will provide updated information regarding committed affordable housing resources to the Coordinator at the time that 120 notices are given, and will provide updates regarding any such additional resources that are developed or secured.

### **Return of Security Deposit**

Security deposits and applicable interest will be processed and returned in accordance with standard policies and procedures. The timing of such return should be expedited to the extent possible. Any Household in receipt of the 120 day notice to vacate will receive a refund of any security deposit and applicable interest, regardless of whether they choose to relocate within the Plan Area and regardless of when they vacate during the 120 day period. Prior to the return of the security deposit, Households will be asked to indicate whether they intend to use the assistance of the Coordinator. Charges for damage to units scheduled to be demolished will not be charged against a Household's security deposit unless the Participating Developer incurs additional costs to prepare the unit for demolition due to the fault of the tenant.

### **Relocation Assistance Payments**

Following the 120 day notice, all displaced Households current with rent will receive relocation assistance payments regardless of income, certification as a Household in Good Standing, or priority for a CAU. The Coordinator will process payment for the Household based on the schedules in the City's Housing Conversion Assistance Policy in effect at the time checks are issued. The current relocation payment schedules are as follows:

**Residents who are not Very Low Income, Elderly or Disabled<sup>1</sup>**

Efficiency \$750  
 One Bedroom \$950  
 One Bedroom and Den or Two Bedroom \$1,150  
 Two Bedroom and Den or Three Bedroom \$1,350  
 Three Bedroom with Den Six Rooms \$1,550

Periodic revisions made by the State will be incorporated into the Relocation Payment Schedule under this Housing Conversion Assistance Policy. It is expected that if the Relocation Payment Schedule is revised by the State, the Participating Developer will adhere to whatever payment levels are in effect at the time payments are made to residents. Households whose income is less than Section 8 very-low income levels or who are elderly or disabled will receive a higher payment equal to 200% of this payment as listed below.

**Residents who are Very Low Income, Elderly or Disabled**

Efficiency \$1,500  
 One Bedroom \$1,900  
 One Bedroom and Den or Two Bedroom \$2,300  
 Two Bedroom and Den or Three Bedroom \$2,700  
 Three Bedroom with Den Six Rooms \$3,100

In regard to the timing of payments, Participating Developers agree to provide relocation payments to residents after residents give 30-day notice after receiving their 120-day Notices to Vacate. Payment should occur in full when the resident has notified the Participating Developer after the 120-day Notice to Vacate has been issued, even if he/she does not vacate the unit until the end of the 120-day period. This payment is to make funds available during the period in which the resident must look for an apartment.

**Fair Housing**

This document is subject to revision if dictated by Fair Housing Laws.

**Committed Affordable Units (CAU)**

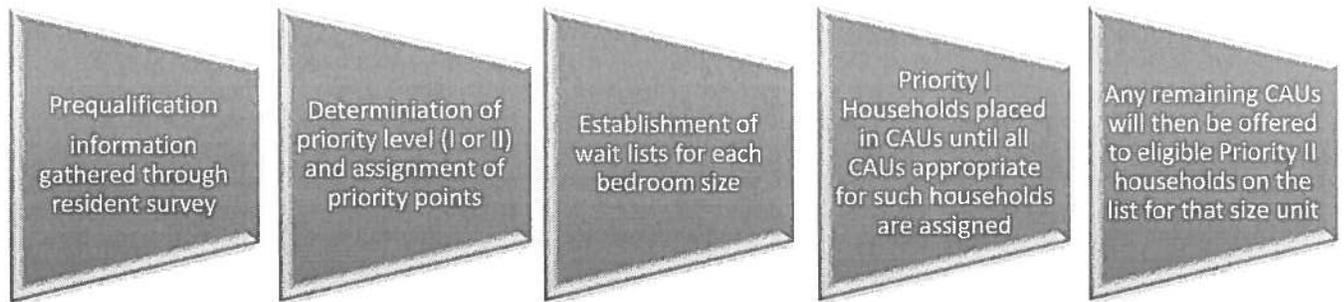
The process of determining eligibility for a CAU will begin at the onset of redevelopment and will continue through all phases. All Households living in properties proposed for redevelopment will receive applications and information regarding the affordable housing program and the application process. The City's Office of Housing will have primary responsibility for eligibility and priority determinations with

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<sup>1</sup> Very Low Income is defined as the current 50% AMI limit established by HUD. Elderly is defined as 62 years of age or older.

assistance from Participating Developers in disseminating information to all Households living in units to be demolished.

### Eligibility and Priority – Office of Housing



### Establishment of Eligibility and Priority Status for CAUs

To assess housing need and qualification for a CAU, the Coordinator will distribute written notification of the CAU Program and the opportunity to submit prequalification information for the purpose of establishing eligibility for a CAU to all Households living in a unit to be demolished during any phase of redevelopment. Prequalification applications and information will be provided by the City and will collect information regarding factors necessary to determine, on a preliminary basis, the eligibility and priority status of each Household for a CAU when available. The package will include a confidentiality waiver allowing the City to verify eligibility information with the Coordinator.

Responses will be returned by the residents directly to the City. Confirmation of receipt of the application will be provided by the City to the resident, but it will be the resident's responsibility to follow up with the City if the Household does not receive confirmation of their application having been received. The City will use the prequalification applications to establish a preliminary wait list for CAUs. The City will prioritize the wait list based on established criteria and preferences discussed below and will maintain the wait list for CAUs. Residents will be responsible for providing the City with updated contact information if/when they relocate at any time while they are on the wait list.

At the time of 120-day notices, the City will provide the Coordinator with an additional information packet to be distributed with the Developer's notice. The packet of information will request updated information from all Households in residence in the affected units at that time, including Households on the wait list. The information will include a confidentiality waiver allowing the City to verify eligibility information with the Coordinator.

City staff will request new qualification income from Households on the wait list for a CAU at the time of each redevelopment or when a potential unit is identified for a Household on the wait list. Final information will be verified by City staff when a CAU becomes available for the Household. A Household's final eligibility and priority designations will be established at that time regardless of the Household's status at the time of prequalification.

Separate wait lists will be maintained by bedroom size.

### Level I Priority Households

In order to receive Level I priority for a CAU a Household must have lived in a unit identified for demolition on May 12, 2012 when the Beauregard Small Area Plan was approved by City Council and must be living in a unit identified for demolition at the time of approval of this Tenant Assistance Plan by City Council. All Level I priority Households will be assisted within each bedroom size prior to offering CAUs to other Households on the wait list. Although the number of Priority I Households may exceed the number of CAUs, it is possible that the number of Level I Households needing a particular size of unit (e.g., efficiency) may be less than the number of available CAUs of that size, in which case such excess units would be made available to Level II Households and/or other Households qualified for affordable/workforce housing in the event all Level I and II Households have been considered.

### Level II Priority Households

Level II priority Households are residents of a redevelopment property who moved into that property after May 12, 2012 and who live in a unit identified for demolition as of the date of approval of a DSUP that will result in the demolition of their unit or will otherwise displace the Household as a result of the approved DSUP. However, if such a resident moved into the property from another property where the resident had already attained Level I status, the resident will retain the Level I status.

### Priority Criteria

All Level I and Level II Households will be assigned points as shown below. For the purpose of allocating CAUs, all Level I Households will be considered (for a given unit size) before any Level II Households are considered.

### Priority Criteria

Household lives in unit to be demolished at the time of approval of the DSUP*	11
Income @ or below 40% AMI	2
Child or children in Ramsay, John Adams, or Polk Elementary School	2
62 or older and/or has a disability	2
Lived in the plan area for more than three years	1**
<b>OR</b> Lived in the plan area for more than 10 years	2**
Primary place of employment is in or within designated distance 2 miles of plan area	1
Has been relocated during a prior phase	1

\*When Households are relocated to subsequent phases the Household will maintain these points after the move.

\*\*No more than two points for longevity

### Priority and Referral to CAUs

The Coordinator will work with designated City staff in placing priority Households in available CAUs in the order of priority. Points will be assigned (as set forth above) to determine the priority order for relocating residents to a CAU. For each unit size, Households will be reviewed in order of their point values. The priority order of Households with identical point values will be determined by lottery. If a CAU that meets a Household's need is available, the Household will be relocated to the CAU. If no CAU is available, the Household will be referred to a Comparable Unit and remain or be placed on a wait list for a future CAU if and when a suitable one (i.e., size, affordability level) becomes available.

**Priorities I A, I B, II A and II B in the Tenant Assistance and Relocation Plan (TARP):**

<b>Current Language</b>	<b>Proposed Language</b>
<p><b><u>Level I Priority Households</u></b>            In order to receive Level I priority for a CAU a Household must have lived in a unit identified for demolition on May 12, 2012 when the Beauregard Small Area Plan was approved by City Council and must be living in a unit identified for demolition at the time of approval of this Tenant Assistance Plan by City Council. All Level I priority Households will be assisted within each bedroom size prior to offering CAUs to other Households on the wait list. Although the number of Priority I Households may exceed the number of CAUs, it is possible that the number of Level I Households needing a particular size of unit (e.g., efficiency) may be less than the number of available CAUs of that size, in which case such excess units would be made available to Level II Households and/or other Households qualified for affordable/workforce housing in the event all Level I and II Households have been considered.</p>	<p><b><u>Level I Priority Households</u></b>            In order to receive Priority I A for a CAU a Household must have lived in a unit identified for demolition on May 12, 2012 when the Beauregard Small Area Plan was approved by City Council, must be living in a unit identified for demolition at the time of the original approval of this Tenant Assistance Plan by City Council (April 13, 2013) All Priority I Households (<u>A and B</u>) will be assisted within each bedroom size prior to offering CAUs to other Households on the wait list. Although the number of Priority I Households (<u>A and B</u>) may exceed the number of CAUs, it is possible that the number of <u>Priority I</u> Households needing a particular size of unit (e.g., efficiency) may be less than the number of available CAUs of that size, in which case such excess units would be made available to <u>Priority II</u> Households and/or other Households qualified for affordable/workforce housing in the event all <u>Priority I</u> and II Households have been considered.</p> <p><b><u>Level I A Priority Households</u></b> - <i>In order to receive Priority I A for a CAU a household must meet the Priority I criteria <u>and</u> must have received a 120-day notice to vacate. All Priority I A Households will be assisted within each bedroom size prior to offering CAUs to other Priority I households. This Priority I A designation will expire at the end of the 120- days-notice.</i></p> <p><b><u>Level I B Priority Households</u></b> - <i>All Priority I households that do not have an active 120-day notice to vacate.</i></p>
<p><b><u>Level II Priority Households</u></b>            Level II priority Households are residents of a redevelopment property who moved into that property after May 12, 2012 and who live in a unit identified for demolition as of the date of approval of a DSUP that will result in the demolition of their unit or will otherwise displace the Household as a result of the approved DSUP. However, if such a resident moved into the property from another property where the resident had already attained Level I status, the resident will retain the Level I status.</p>	<p><b><u>Level II Priority Households</u></b>            Level II Priority Households are residents of a redevelopment property who moved into that property after May 12, 2012, who live in a unit identified for demolition as of the date of approval of a DSUP that will result in the demolition of their unit or will otherwise displace the Household as a result of the approved DSUP. However, if such a resident moved into the property from another property where the resident had already attained Priority I status, the resident will retain the Priority I status.</p> <p><b><u>Level II A Priority Households</u></b> - <i>In order to receive Priority II A for a CAU a household must meet the Priority II criteria <u>and</u> must have received a 120-day notice to vacate. All Priority II A Households will be assisted within each bedroom size prior to offering</i></p>

	<p><i>CAUs to other Priority II households on the wait list. This Priority II A designation will expire at the end of the 120- days- notice.</i></p> <p><b><u>Level II B Priority Households</u></b> – <i>All Priority II households that do not have an active 120 day notice to vacate</i></p>
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#7A

## Housing Trust Fund Programs Financial Status

As of August 31, 2014

<b>Balance as of July 31, 2014</b>	<b>6,971,835</b>
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<b>Revenues for August 2014</b>	
Contributions	140,700
Loan Repayments	
Community Lodgings, Inc. (CLI)	2,094
Moderate Income Homeownership Program (MIHP)	36,757
Employee Homeownership Incentive Program (EHIP)	5,765
HCS - Subordination Fee Deposits	75
Fees Offsetting Expenditures	0
	<b>185,391</b>

<b>Expenditures for August 2014</b>	
Flexible Homeownership Program	41
Homeownership Counseling	
Rebuilding Together Alexandria	0
Housing Opportunities Fund - <i>see attached report</i>	
Rental Accessibility Modification Program (RAMP)	0
	<b>(41)</b>

<b>Balance Available Before Outstanding Commitments/Reservations</b>	<b>7,157,185</b>
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<b>Outstanding Commitments/Reservations as of August 31, 2014</b>	
Braddock Small Area Plan Fund	834,080
Flexible Homeownership Program	312,733
HOME/HOF Match	433,657
Homeownership Counseling	55,967
FY 2016 Budget Reservation	200,000
Housing Opportunities Fund - <i>see attached report</i>	1,754,168
Misc Project	0
RTA	50,000
Beauregard Fund	2,400,000
Rental Accessibility Modification Program (RAMP)	6,215
	<b>(6,046,819)</b>

<b>Unreserved Balance as of August 31, 2014</b>	<b>1,110,366</b>
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## Housing Opportunities Fund Financial Status

As of August 31, 2014

	HTF	General Fund	HOME	TOTAL
<b>Balance as of July 31, 2014</b>	1,754,168	107,356	2,136,146	3,997,670
<b>August 2014 Expenditures</b>	0	0	0	0
<b>Balance Available Before Outstanding Commitments</b>	<b>1,754,168</b>	<b>107,356</b>	<b>2,136,146</b>	<b>3,997,670</b>
<b>Outstanding Commitments</b>				
Alexandria Housing Development Corporation (AHDC)	85,713	107,356		193,069
CLI Notabene			393	393
Wesley Lynhaven Apt			1,078,000	1,078,000
Fees for Professional Services	21,850			21,850
<b>Unreserved Balance as of July 31, 2014</b>	<b>1,646,605</b>	<b>0</b>	<b>1,057,754</b>	<b>2,704,359</b>

**HOMEOWNERSHIP PROGRAMS REPORT**  
**August 2014**

		<i>August 2014</i>			<i>Total FY 2015 as of August 31, 2014</i>			
	Loans Committed	Amount and Source of Committed Loan Funds	Loans Settled	Amount and Source of Settled Loan Funds	Loans Committed	Amount and Source of Committed Loan Funds	Loans Settled	Amount and Source of Settled Loan Funds
<b>Flexible Homeownership Program</b>	1	HOME HAP Loan - \$50,000			1	CDBG - \$0 HOME - \$50,000 HTF - \$0		CDBG - \$0 HOME - \$0 HTF - \$0

**Flexible Homeownership Loan Balances by source as of August 31, 2014:**

HOME \$ 107,302  
 CDBG \$ 532  
 Housing Trust Fund \$ 312,733

#7C

**Other Housing Development Fund Financial Status**

**As of August 31, 2014**

	Tax Revenue Account	Bond Account	TOTAL
Balance as of July 31, 2014	1,132,902	0	1,132,902
August 2014 Expenditures			
Balance Available Before Outstanding Commitments	1,132,902	0	1,132,902
Outstanding Commitments			0
Unreserved Balance as of August 31, 2014	1,132,902	0	1,132,902