



HOUSING & COMMUNITY SERVICES  
**MEMORANDUM**

Date: JULY 28, 2025  
To: HOUSING AUTHORITY COMMISSIONERS  
From: JENNIFER MENDOZA, HOUSING & COMMUNITY SERVICES TECHNICIAN  
Subject: ANNUAL ADJUSTMENT TO THE HOUSING AUTHORITY FEE SCHEDULE

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Attached for your information is a copy of the Housing Authority of the City of Santa Rosa Fee Schedule which has been updated in accordance with Housing Authority Resolution No. 1544 that adopted processing fees on June 11, 2012. Single Family Residence, Project Management Services, and Compliance Fees will increase 3% annually effective July 1 as per Housing Authority Resolution No. 1645. Density Bonus/Housing Allocation Plan Programs fees will increase annually by the Consumer Price Index (CPI) 12 Months Percent Change for the year ending April 30 as per City Council Resolution No. 24029.

The Housing Authority of the City of Santa Rosa approved the delegation of approval Authority to the Executive Director on certain requests, in order to achieve administrative cost savings as per Resolution No. 1770.

Attachments: Housing Authority Processing Fees & Charges as of July 1, 2025  
Housing Authority Resolution No. 1770  
Housing Authority Resolution No. 1544  
Housing Authority Resolution No. 1645  
City Council Resolution No. 24029

# HOUSING AUTHORITY of the CITY OF SANTA ROSA FEES

## EFFECTIVE July 1, 2025\*

|  |   |                       |
|--|---|-----------------------|
| <b>Single Family Residence</b><br>(includes condominium or mobilehome) | Subordination   | \$ 145                |
|  | Reconveyance/Release (Max per California Civil Code § 2941 & 2943)  | \$ 45                 |
|  | Loan Payoff Demand  | \$ 145                |
| <b>Project Management Services</b>                                     | Loan application to Housing Authority Board   | \$ 2,203              |
|  | Other request for Housing Authority Board approval (any matter that requires staff to seek Housing Authority Board approval, except where Housing Authority Board approval is included in another fee for service in this fee schedule)                               | \$ 2,203              |
|  | Loan/Contract document processing (fee amount may be included as project cost to be paid at closing or as reimbursable cost)  | \$ 8,077              |
|  | Housing Authority conduit State or Federal loan or grant application submitted on behalf of a developer (such as RDLP, BEGIN)   | \$ 8,077              |
|  | Request for change of property management   | \$ 3,231              |
|  | Request for change of project ownership (including withdrawal and replacement of Limited Partner)   | \$ 3,231              |
|  | Request for change of ownership with loan revision (such as resyndication; includes request for Housing Authority Board approval and loan document processing - fee may be included as project cost payable at closing or as reimbursable cost)                       | \$ 14,686             |
|  | Request for loan payoff demand & deed of trust reconveyance   | \$ 368                |
|  | Request for Housing Authority consent within the authority of the Executive Director (such as subordinations, option extensions, easements, non-disturbance agreements - if Housing Authority Board approval is required, a separate fee for that service will apply) | \$ 2,939              |
|  | Request for further advance or loan modification (includes request for Housing Authority Board approval and loan document processing - fee may be included as project cost payable at closing or as reimbursable cost)  | \$ 6,240              |
| <b>Compliance</b>  | Application or annual renewal for temporary rental of owner-occupancy restricted unit   | \$ 733                |
|  | Request for amendment or revision to existing Regulatory Agreement within approval authority of Executive Director; if Housing Authority Board approval is required, a separate fee for that service will apply)  | \$ 881                |
|  | Monitoring fee for Housing Authority subsidized projects (per unit; not applicable for Bond projects where the City is the issuer). The fee applies to any projects approved after the effective date   | \$ 38                 |
| <b>Density Bonus Program / Housing Allocation Plan Contract</b>        | Compliance Monitoring Per Unit Fee - adjusted annually based on the CPI 12 Months Percent Change for the Year Ending April 30th for the San Francisco-Oakland-Hayward Metropolitan Statistical Area.  | \$ 164<br>Multifamily |
|  | Compliance Monitoring Per Unit Fee - adjusted annually based on the CPI 12 Months Percent Change for the Year Ending April 30th for the San Francisco-Oakland-Hayward Metropolitan Statistical Area.  | \$ 83<br>Senior       |

\*Fee schedule authorized by Housing Authority Resolution #1544 on June 11, 2012; fee schedule effective 10/1/2012.

- 1) Fees will increase 3% annually effective July 1 as per Housing Authority Resolution #1645.
- 2) Fees will not be charged if prohibited by funding source.
- 3) Unless otherwise expressly stated in this fee schedule, fee is due with submission of request.
- 4) Density Bonus and Housing Allocation increases annually by the CPI Percent Change as per City Council Resolution #24029.
- 5) The Housing Authority of the City of Santa Rosa approved the delegation of approval Authority to the Executive Director on certain requests, in order to achieve administrative cost savings as per Resolution #1770.

RESOLUTION NO. 1770

RESOLUTION OF THE HOUSING AUTHORITY OF THE CITY OF SANTA ROSA  
DELEGATING APPROVAL AUTHORITY TO THE EXECUTIVE DIRECTOR OR  
DESIGNEE FOR CERTAIN REQUESTS RELATED TO MULTIFAMILY RENTAL AND  
OWNERSHIP HOUSING AGREEMENT MODIFICATIONS TO ACHIEVE  
ADMINISTRATIVE COST SAVINGS

WHEREAS, The Housing Authority currently maintains an ownership portfolio of 280 homes throughout Santa Rosa, consisting of loans, option agreements, and resale restriction agreements for which the Housing Authority staff performs detailed eligibility processing and loan underwriting for the issuance of new loans, option agreements, and resale restriction agreements for new homes and resales; and

WHEREAS, post issuance of loans and agreements, staff performs loan servicing tasks including loan payoffs, receipt payments, collection efforts, releasing of liens when appropriate, and subordination requests; and

WHEREAS, on December 12, 2011, the Housing Authority, by Resolution No. 1534, approved a delegation of authority to Executive Director or designee for consideration and action on items such as timeline extensions, subordination of loan agreements, amendment to regulatory agreements, density bonus increase program compliance monitoring fee annual CPI adjustment, and policy statement of temporary rental of owner-occupied restricted units; and

WHEREAS, the previously approved delegation of approval authority now requires updates consistent with current lending practices, the type of requests received from borrower/owners, and provisions for homeownership agreements; and

WHEREAS, in anticipation of ownership agreements and loans maturing beginning in May 2024, it is desired to streamline the administrative review process of certain request to extend or modify loans and agreements for single-family homeowners that would traditionally be brought forward to the Housing Authority for consideration and action, to achieve administrative cost savings by eliminating the time and expense to prepare agenda items for each request; and

NOW, THEREFORE, BE IT RESOLVED that the Housing Authority of the City of Santa Rosa delegates approval authority to the Executive Director or designee, for consideration and action on the items listed on Exhibit A, entitled "Housing Authority Delegation of Approval Authority to Executive Director or Designee for Consideration and Action," a copy of which is attached to, and made part of this resolution, subject to and consistent with the criteria set forth in Exhibit A for each item.

IN HOUSING AUTHORITY DULY PASSED this 25<sup>TH</sup> day of March, 2024.

AYES: (5) Commissioner Downey, Commissioner Owen, Commissioner Smith, Vice Chair  
Newton, Chair LaPenna

NOES:

ABSENT: (1) Commissioner Friedman

ABSTAIN: (1) Commissioner Conte

ATTEST: Megan Basinger  
Secretary

APPROVED: Tom LaPenna  
Tom LaPenna (Jun 13, 2024 15:23 PDT)  
Chair

APPROVED AS TO FORM: Ethan Walsh  
Ethan Walsh (Jun 18, 2024 09:50 PDT)  
City Attorney

## EXHIBIT A

### HOUSING AUTHORITY DELEGATION OF APPROVAL AUTHORITY TO EXECUTE DIRECTOR OR DESIGNEE FOR CONSIDERATION AND ACTION

| Item for Consideration and Action by<br>Executive Director or Designee   | Approval Criteria   |
|--|---|
| 1. Construction timeline extension   | <ul style="list-style-type: none"> <li>• Shift in timelines of other financing sources; or</li> <li>• Construction delays beyond the control of the borrower/owner that will not compromise completion of the project</li> </ul>  |
| 2. Subordination Agreements<br>(Rental and Ownership)  | <ul style="list-style-type: none"> <li>• Loan to value ratio remains unchanged or no higher than 150% and/or more favorable lien position;</li> <li>• Requirement of senior lender; and</li> <li>• Equal or lower rate and term refinance with no cash-out.</li> </ul>  |
| 3. Assignment and Assumption<br>Agreements and Change of<br>Ownership  | <ul style="list-style-type: none"> <li>• Change in ownership structure;</li> <li>• Limited partner exit; or</li> <li>• Sale or Transfer of property/project.</li> </ul>   |
| 4. Amendment to Regulatory<br>Agreements (Amendments,<br>Amended and Restated Agreements,<br>etc.)                   | <ul style="list-style-type: none"> <li>• To clarify language regarding rent limits and rental subsidies;</li> <li>• As a requirement of senior lender, federal or state law or provision;</li> <li>• Due to change of financing structure or project design;</li> <li>• To provide non-restricted units to comply with state requirements for on-site managers;</li> <li>• To meet current lending policies; or</li> <li>• If a reduction in project unit total, must be no more than 10% reduction.</li> </ul> |
| 5. Timeline extension for Housing<br>Authority Option to Purchase<br>Unused Mitigation Credits                       | <ul style="list-style-type: none"> <li>• No available purchasers</li> <li>• Compliance with all other provisions of applicable agreement</li> </ul>   |
| 6. Compliance Monitoring Fee Annual<br>CPI Adjustments   | <ul style="list-style-type: none"> <li>• Automatic adjustment based on CPI</li> </ul>   |
| 7. Santa Rosa Creek Commons Service<br>Agreement annual renewal  | <ul style="list-style-type: none"> <li>• Requirement of senior lender</li> </ul>  |
| 8. Homeownership Loan Modifications  | <ul style="list-style-type: none"> <li>• Term extensions up to 15 years, due upon sale, transfer, default, or certain refinances; or</li> <li>• Modifications from amortized monthly payments to deferred loans at 3% interest or shared appreciation with a 15-year term.</li> </ul>   |
| 9. Modification to other<br>Homeownership Agreements<br>(Resale Restriction, Option, other<br>liens of record, etc.) | <ul style="list-style-type: none"> <li>• As required by senior lender;</li> <li>• In the event to of a refinance; or</li> <li>• To cure a default</li> </ul>  |












# Resolution 1770

Final Audit Report

2024-06-18


|                 |   |
|-----------------|---|
| Created:        | 2024-06-13                                  |
| By:             | Ashley Paul (apaul@srcity.org)              |
| Status:         | Signed                                      |
| Transaction ID: | CBJCHBCAABAABGg393hPR-bJEBUbHnh1cTJEYeLhIWg |

## "Resolution 1770" History

-  Document created by Ashley Paul (apaul@srcity.org)  
2024-06-13 - 9:50:09 PM GMT
-  Document emailed to Megan Basinger (mbasinger@srcity.org) for signature  
2024-06-13 - 9:50:38 PM GMT
-  Email viewed by Megan Basinger (mbasinger@srcity.org)  
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-  Document e-signed by Megan Basinger (mbasinger@srcity.org)  
Signature Date: 2024-06-13 - 9:51:24 PM GMT - Time Source: server
-  Document emailed to tdlapenna@gmail.com for signature  
2024-06-13 - 9:51:25 PM GMT
-  Email viewed by tdlapenna@gmail.com  
2024-06-13 - 9:54:51 PM GMT
-  Signer tdlapenna@gmail.com entered name at signing as Tom LaPenna  
2024-06-13 - 10:23:52 PM GMT
-  Document e-signed by Tom LaPenna (tdlapenna@gmail.com)  
Signature Date: 2024-06-13 - 10:23:54 PM GMT - Time Source: server
-  Document emailed to ethan.walsh@bbklaw.com for signature  
2024-06-13 - 10:23:55 PM GMT
-  Email viewed by ethan.walsh@bbklaw.com  
2024-06-14 - 1:24:22 AM GMT
-  Signer ethan.walsh@bbklaw.com entered name at signing as Ethan Walsh  
2024-06-18 - 4:50:44 PM GMT



**Adobe Acrobat Sign**

 Document e-signed by Ethan Walsh (ethan.walsh@bbklaw.com)

Signature Date: 2024-06-18 - 4:50:46 PM GMT - Time Source: server

 Agreement completed.

2024-06-18 - 4:50:46 PM GMT



**Adobe Acrobat Sign**

RESOLUTION NO. 1544

RESOLUTION OF THE HOUSING AUTHORITY OF THE CITY OF SANTA ROSA  
ADOPTING HOUSING AUTHORITY OF THE CITY OF SANTA ROSA PROCESSING  
FEES AND CHARGES (FEE SCHEDULE).

WHEREAS, the Housing Authority of the City of Santa Rosa (Authority) is undergoing financial pressures due to the loss of low-mod funds previously received from the Redevelopment Agency for the City of Santa Rosa, which was dissolved earlier this year, in addition to a significant reduction in in-lieu fees and transfer tax revenues supporting affordable housing programs in the City of Santa Rosa; and

WHEREAS, the Authority held a duly noticed public hearing on June 11, 2012, where it considered whether to adopt a schedule of fees and charges for certain services provided by the Authority, including consideration of a staff report and presentation, public comment written and oral, and other information presented to the Authority at the public hearing on this issue; and

WHEREAS, the Authority finds it necessary and appropriate to adopt a schedule of fees and charges for certain services provided by the Authority in order to sustain the continuing efforts of the Authority to promote and support affordable housing programs in the City of Santa Rosa to be administered by the Santa Rosa Housing Trust.

NOW, THEREFORE, BE IT RESOLVED that the Housing Authority of the City of Santa Rosa hereby adopts the following fees and charges (Fee Schedule) for the services and work specified in the Fee Schedule:

| HOUSING AUTHORITY of the CITY OF SANTA ROSA PROCESSING<br>FEES & CHARGES* |   |         |
|---|---|---------|
| Single Family Residence<br>(includes condominium or mobilehome)           | Subordination (existing fee is \$75)  | \$100   |
|   | Reconveyance/Release  | \$100   |
|   | Loan Payoff Demand  | \$100   |
| Project Management Services   | Loan application to Housing Authority Board   | \$1,500 |
|   | Other request for Housing Authority Board approval (any matter that requires staff to seek Housing Authority Board approval, except where Housing Authority Board approval is included in another fee for service in this fee schedule) | \$1,500 |
|   | Loan/Contract document processing (fee amount may be included as project cost to be paid at closing or as reimbursable cost)  | \$5,500 |



|                   |   |          |
|-------------------|---|----------|
|                   | Housing Authority conduit State or Federal loan or grant application submitted on behalf of a developer (such as RDLP, BEGIN)   | \$5,500  |
|                   | Request for change of property management   | \$2,200  |
|                   | Request for change of project ownership (including withdrawal and replacement of Limited Partner)   | \$2,200  |
|                   | Request for change of ownership with loan revision (such as resyndication; includes request for Housing Authority Board approval and loan document processing - fee may be included as project cost payable at closing or as reimbursable cost)                       | \$10,000 |
|                   | Request for loan payoff demand & deed of trust reconveyance   | \$250    |
|                   | Request for Housing Authority consent within the authority of the Executive Director (such as subordinations, option extensions, easements, non-disturbance agreements - if Housing Authority Board approval is required, a separate fee for that service will apply) | \$2,000  |
|                   | Request for further advance or loan modification (includes request for Housing Authority Board approval and loan document processing - fee may be included as project cost payable at closing or as reimbursable cost)  | \$4,250  |
| <b>Compliance</b> | Application or annual renewal for temporary rental of owner-occupancy restricted unit   | \$500    |
|                   | Request for amendment or revision to existing Regulatory Agreement within approval authority of Executive Director; if Housing Authority Board approval is required, a separate fee for that service will apply)  | \$600    |
|                   | Monitoring fee for Housing Authority subsidized projects (per unit; not applicable for Bond projects where the City is the issuer). The fee applies to any projects approved after the effective date.  | \$25     |

\* 1) Fees will increase 3% annually from the effective date; 2) Fees will not be charged if prohibited by funding source; 3) Unless otherwise expressly stated in this fee schedule, fee is due with submission of request.

BE IT FURTHER RESOLVED, that the Fee Schedule shall become effective on the later of (i) sixty (60) days following the date of its adoption, or (ii) October 1, 2012.

BE IT FURTHER RESOLVED, that the Authority hereby directs and authorizes the Executive Director of the Housing Authority to charge and collect the fees consistent with and as set forth in the Fee Schedule as of the effective date thereof.

BE IT FURTHER RESOLVED, that the Authority finds that the Fee Schedule approved in this resolution is for the purposes of meeting operating expenses and, accordingly, the Authority finds this resolution exempt from the provisions of the

California Environmental Quality Act under section 21080(b) and State CEQA Guidelines section 15273(a). The Housing Authority further finds that the Fee Schedule adopted by the resolution is not subject to the California Environmental Quality Act under the provisions of the State CEQA Guidelines section 15061(b)(3) in that the Housing Authority finds that there is no possibility such Fee Schedule will have a significant effect on the environment.

DULY AND REGULARLY ADOPTED by the Housing Authority of the City of Santa Rosa this 11th day of June, 2012.

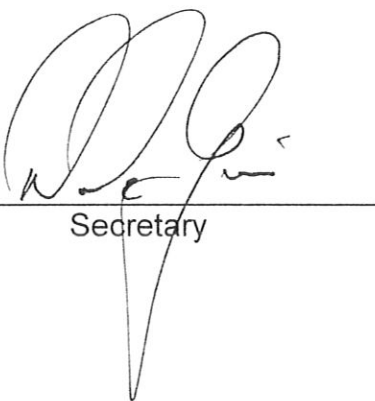
AYES: Burke, Olsen, Arnone, and Vice-Chairman Gonzalez

NOES: Harris

ABSENT: Lemke and Chairperson Castro

ABSTAIN:

APPROVED:   
Chairman

ATTEST:   
Secretary

RESOLUTION NO. 1645

RESOLUTION OF THE HOUSING AUTHORITY OF THE CITY OF SANTA ROSA  
APPROVING ADJUSTMENT OF HOUSING AUTHORITY FEE INCREASE EFFECTIVE DATE  
FROM OCTOBER 1 TO JULY 1 ANNUALLY TO BE CONSISTENT WITH THE CITYWIDE  
MASTER FEE SCHEDULE

WHEREAS, to sustain the services provided by the Santa Rosa Housing Trust in its administration of affordable housing programs, the Housing Authority adopted Resolution No. 1544 establishing processing fees and charges in June 2012; and

WHEREAS, Resolution No. 1544 not only established fees effective October 1, 2012, but also provided for a 3% increase on October 1 of each year; and

WHEREAS, other City departments increase their fees annually, some on January 1 and some on July 1; and

WHEREAS, the Housing Authority operates on a July 1 – June 30 fiscal year; and

WHEREAS, to be consistent with the Housing Authority's budgeting process, fiscal year, and other City departments' fee schedule increase dates, the Housing Authority should align its fee increase date with other departments.

NOW, THEREFORE, BE IT RESOLVED that the Housing Authority of the City of Santa Rosa hereby approves adjustment of the annual effective date for increase of Housing Authority of the City of Santa Rosa Processing Fees and Charges (Fee Schedule) from October 1 to July 1 starting with Fiscal Year 2018/2019.

DULY AND REGULARLY ADOPTED by the Housing Authority of the City of Santa Rosa this 26<sup>th</sup> day of February, 2018.

AYES: (4) Lemke, Olsen, Burke, and Chair Harris

NOES: (0)

ABSENT: (2) ~~BXXXXX~~ Bolduc and Downey

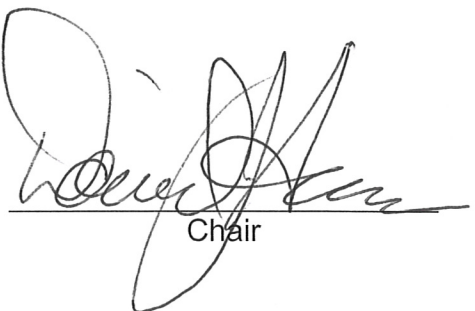
ABSTAIN: (0)

Vacant: (1)

ATTEST:

  
\_\_\_\_\_  
Secretary

APPROVED:

  
\_\_\_\_\_  
Chair

RESOLUTION NO. 24029

RESOLUTION OF THE COUNCIL OF THE CITY OF SANTA ROSA DELEGATING RESPONSIBILITY TO CONDUCT DENSITY BONUS AGREEMENT COMPLIANCE TO THE HOUSING AUTHORITY OF THE CITY OF SANTA ROSA, INCREASING THE ANNUAL COMPLIANCE FEE FOR RENTAL UNITS, AND CONFIRMING OTHER EXISTING FEES

WHEREAS, the City of Santa Rosa is about to adopt an ordinance governing residential density bonuses pursuant to Government Code sections 65915; and

WHEREAS, it is necessary to monitor the agreements and contracts granting density bonuses to ensure that the targeted housing is being provided in compliance with the agreement; and

WHEREAS, the Housing Authority of the City of Santa Rosa has conducted such monitoring in the past; and

WHEREAS, the current annual compliance fee for rental units is insufficient to cover the costs of conducting that monitoring.

NOW, THEREFORE, BE IT RESOLVED by the Council of the City of Santa Rosa that:

1. The responsibility for conducting monitoring of density bonus agreements and contracts is delegated to the Housing Authority of the City of Santa Rosa; and
2. The annual monitoring compliance fee is increased to \$40 per senior rental unit and \$80 per affordable rental unit; and
3. The annual compliance fee may be increased annually hereafter, based upon the Consumer Price Index, by action of the Housing Authority; and
4. Except as changed by this resolution, previously imposed fees for processing density increase applications and for monitoring density increase agreements and contracts, as set forth in Exhibit A, attached to and made a part hereof, shall remain in effect.

IN COUNCIL DULY PASSED this 22nd day of June, 1999.

AYES: (6) Mayor Condron; Councilmembers Martini, Vas Dupre, Evans, Rabinowitsh, Wright  
NOES: (0)  
ABSENT: (1) Councilmember Runyan  
ABSTAIN: (0)

APPROVED: Janet Condron  
Mayor

ATTEST: Audrey Haggard  
Assistant City Clerk

APPROVED AS TO FORM:

[Signature]  
City Attorney

**EXHIBIT A**

**EXISTING DENSITY INCREASE FEES**

**1. Application Processing Fee for Density Bonus Project.**

Rental project: \$300.

For-Sale project: \$500.

**2. Monitoring-Compliance Fee for a Targeted Unit.**

For-Sale project: ½ point on sales price to be paid at time of each title transfer of each targeted dwelling unit.