



HOUSING & COMMUNITY SERVICES
MEMORANDUM

Date: JULY 24, 2023
To: HOUSING AUTHORITY COMMISSIONERS
From: JENNIFER MENDOZA, HOUSING & COMMUNITY SERVICES TECHNICIAN
Subject: ANNUAL ADJUSTMENT TO THE HOUSING AUTHORITY FEE SCHEDULE

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 Program 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, including Density Increase Program compliance fee adjustments on Resolution No. 1534.

Attachments: Housing Authority Processing Fees & Charges as of July 1, 2023
Housing Authority Resolution No. 1534
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, 2023*

Single Family Residence (includes condominium or mobilehome)	Subordination	\$ 137
	Reconveyance/Release (Max per California Civil Code § 2941 & 2943)	\$ 45
	Loan Payoff Demand	\$ 137
Project Management Services	Loan application to Housing Authority Board	\$ 2,076
	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)	\$ 2,076
	Loan/Contract document processing (fee amount may be included as project cost to be paid at closing or as reimbursable cost)	\$ 7,613
	Housing Authority conduit State or Federal loan or grant application submitted on behalf of a developer (such as RDLP, BEGIN)	\$ 7,613
	Request for change of property management	\$ 3,045
	Request for change of project ownership (including withdrawal and replacement of Limited Partner)	\$ 3,045
	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)	\$ 13,843
	Request for loan payoff demand & deed of trust reconveyance	\$ 347
	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)	\$ 2,771
	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)	\$ 5,882
Compliance	Application or annual renewal for temporary rental of owner-occupancy restricted unit	\$ 691
	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)	\$ 830
	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	\$ 36
Density Bonus Program	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.	\$ 156 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.	\$ 79 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 Program increases annually by the CPI Percent Change as per Housing Authority 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, approving revision of the Housing Authority policy statement of temporary rental of an owner-occupancy restricted unit, in order to achieve administrative cost savings as per Resolution #1534.

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 FEES & CHARGES*		
Single Family Residence (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
Compliance	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.

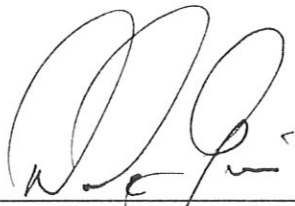
AYES: Burke, Olsen, Arnone, and Vice-Chairman Gonzalez

NOES: Harris

ABSENT: Lemke and Chairperson Castro

ABSTAIN:

ATTEST:



Secretary

APPROVED:



Chairman

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 26th day of February, 2018.

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

NOES: (0)

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

ABSTAIN: (0)

Vacant: (1)

ATTEST:

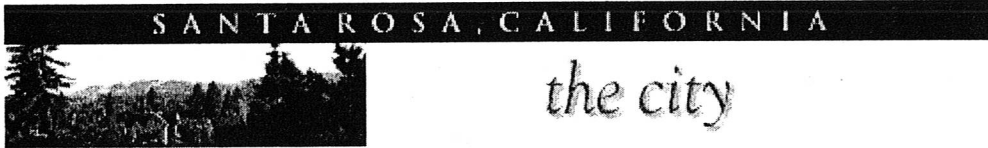


Secretary

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.

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.

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

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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 Condrón; Councilmembers Martini, Vas Dupre, Evans, Rabinowitsh, Wright
 NOES: (0)
 ABSENT: (1) Councilmember Runyan
 ABSTAIN: (0)

APPROVED: Janet Condrón
 Mayor

ATTEST: Audrey Hays
 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.

RESOLUTION OF THE HOUSING AUTHORITY OF THE CITY OF SANTA ROSA APPROVING DELEGATION OF APPROVAL AUTHORITY TO THE EXECUTIVE DIRECTOR OR DESIGNEE ON CERTAIN REQUESTS, AND APPROVING REVISION OF THE HOUSING AUTHORITY POLICY STATEMENT OF TEMPORARY RENTAL OF AN OWNER-OCCUPANCY RESTRICTED UNIT, IN ORDER TO ACHIEVE ADMINISTRATIVE COST SAVINGS

WHEREAS, there is potential to provide future cost savings to the Housing Authority's budget by streamlining the administrative review process of certain items traditionally brought forward to the Housing Authority for consideration and action; and

WHEREAS, it is desired to achieve administrative cost savings in order to make more resources available for program purposes; and

WHEREAS; the items listed on the attached Exhibit A are suitable for delegation of approval authority to the Executive Director or designee, subject to the identified criteria for each item, thereby eliminating the time and expense to prepare agenda items for Housing Authority meetings; and

WHEREAS, the Housing Authority's administrative policy for the temporary rental of owner-occupancy restricted units, as adopted on July 25, 2005, by Resolution No. 1336 (Temporary Rental Policy) currently allows consideration and action by the Executive Director or designee for a maximum of three years, after which Housing Authority consideration and action is required, thereby creating potential administrative costs to the Housing Authority budget in preparation of agenda items; and

WHEREAS, temporary rentals of owner-occupancy restricted units incur administrative costs to process applications and monitor compliance with rental agreements; and

WHEREAS, it is desired to update the Temporary Rental Policy including the following revision;

Elimination of the three year time limit on delegation of approval authority to the Executive Director or designee, instead providing delegation of approval authority to the Executive Director or designee to consider and act on requests consistent with the applicable recorded subdivision covenants.

NOW, THEREFORE, BE IT RESOLVED that the Housing Authority of the City of Santa Rosa delegates approval authority to the Executive Director, or its 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 a part of this resolution, subject to and consistent with the criteria set forth in Exhibit A for each item.

BE IT FURTHER RESOLVED that the revised Housing Authority Policy, entitled "Policy Statement of Temporary Rental of an Owner-Occupancy Restricted Unit" be adopted, a copy of which is attached to, and made a part of this resolution.

BE IT FURTHER RESOLVED that approvals by the Executive Director or designee pursuant to this resolution shall be reported to the Housing Authority in the Monthly Activities Report.

DULY AND REGULARLY ADOPTED by the Housing Authority of the City of Santa Rosa this 12th day of December, 2011.


AYES: Burke, Arnone, Olsen, Gonzalez, and Chairperson Lemke

NOES: Castro-Herrera and Harris

ABSENT:

ABSTAIN:

ATTEST:


Secretary

APPROVED:


Chairman

EXHIBIT A

**HOUSING AUTHORITY DELEGATION OF APPROVAL AUTHORITY
TO EXECUTIVE DIRECTOR OR DESIGNEE FOR CONSIDERATION AND ACTION**

Item for Consideration and Action by Executive Director or Designee	Approval Criteria
1. Construction timeline extension	<ul style="list-style-type: none"> • Shift in timelines of other financing sources • Construction delays beyond the control of the applicant that will not compromise completion of the project
2. Subordination of Loan Agreement	<ul style="list-style-type: none"> • Loan to value ratio remains unchanged or no higher than 150% and/or more favorable lien position • Requirement of senior lender
3. Amendment to Regulatory Agreement to provide non-restricted unit(s)	<ul style="list-style-type: none"> • To meet State requirement for on-site resident manager(s), at legally required ratio
4. Amendment to Regulatory Agreement for revision of project unit total, or change in unit mix within approved total units (percentage of units by income level or type)	<ul style="list-style-type: none"> • Requirement of senior lender • Change of financing structure or project design • If a reduction in project unit total, must be no more than 10% reduction
5. Timeline extension for Housing Authority Option to Purchase Unused Mitigation Credits	<ul style="list-style-type: none"> • No available purchasers • Compliance with all other provisions of applicable agreement
6. Density Increase Program Compliance Monitoring Fee Annual CPI Adjustment	<ul style="list-style-type: none"> • Automatic adjustment based on CPI
7. Santa Rosa Creek Commons Service Agreement annual renewal	<ul style="list-style-type: none"> • Requirement of senior lender

HOUSING AUTHORITY OF THE CITY OF SANTA ROSA POLICY STATEMENT
Effective Date _____

TEMPORARY RENTAL OF AN OWNER-OCCUPANCY RESTRICTED UNIT

I. INTRODUCTION

A. PURPOSE

The purpose of the Temporary Rental of an Owner-Occupancy Restricted Unit Policy is to establish an administrative procedure for the Executive Director or designee to review and make a determination on requests for temporary rental of owner-occupancy restricted units.

II. PROCEDURES FOR REQUESTS

The following steps must be taken in order for the Department of Economic Development and Housing to consider the request:

- A. The property owner must submit a written request to rent the residence. The request for temporary rental should be due to unforeseen circumstances and include the reason the owner is unable to reside in the home, and the estimated length of time that the unit will be rented.
- B. The Executive Director or designee will review the request and issue a written determination consistent with the provisions of the applicable subdivision covenant.
- C. If the request is approved, the owner may be assessed an annual fee for application processing and compliance monitoring, as implemented by the Housing Authority.
- D. A Temporary Rental Agreement which includes the following, will be executed: 1) the unit will be targeted to a household whose income is consistent with the provisions of the applicable subdivision covenant, and 2) the maximum rent will be an affordable rent based on the applicable targeted income level, less an allowance for tenant-paid utilities, consistent with the usual and standard method used by the Housing Authority for calculation of affordable rent.
- E. The Temporary Rental Agreement will specify the maximum allowed income level of the tenant(s), the maximum monthly rent to be charged for the unit, and the compliance requirements. Temporary Rental Agreements are valid for one (1) year.

- F. If a property owner finds it necessary to request an extension of the temporary rental, and has complied with the Temporary Rental Agreement, a written request may be submitted as detailed above, for review and determination of the Executive Director or designee.

III. APPEALS

- A. The property owner may appeal the determination of the Executive Director or designee to the Housing Authority.
- B. Staff will prepare a report and present the appeal to the Housing Authority.

Adopted by Resolution No. _____, dated _____

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