

Housing Compliance (HCD) Report



California Department of Housing and Community Development
 Redevelopment Agency Reporting System
 Schedule Menu



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Page Agency: SAN JOSE Fiscal Year :2008/2009 Prepared by: Alina Kwak

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On the reporting pages that follow, you will be presented navigational pages (like this one) and data entry pages. The navigational pages suggest an order but allow you to select which section of the report you would like to work with or view. The Data Entry pages allow you to add and change information in the report. Once the save button is pressed, the form will perform some simple validations before overwriting any existing information that might have existed (the previous data is not stored, so there is not an "Undo Button").

The following areas need to be completed for SAN JOSE's Report to be finalized.

FORM	PAGE(s)	ITEM(s)	SCREEN(click on)
			Agency Information
HCD COVER			Not Applicable: Only to Paper Forms
Sch A, B & D			Area and Activity
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Redevelopment Agency Reporting System - Schedule Menu

California Department of Housing and Community Development



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Page Agency:SAN JOSE Fiscal Year :2008/2009 Prepared by: Alina Kwak

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Please use this form to provide current information about SAN JOSE

Address: 200 East Santa Clara
 14th Floor
 City: SAN JOSE
 County: SANTA CLARA
 State: CA
 Zip: 95113
 Telephone: (408)795-1838 Extension: 0
 Fax: (408)292-6755
 E-Mail: bob.staedler@sanjoseca.gov
 Description:

Update

California Redevelopment Agencies-Fiscal Year 2008/2009
Project Area Contributions to Low and Moderate Income Housing Funds
Sch A Project Area Summary Report
SAN JOSE

Project Area	100% of Tax Increment	20% Set Aside Requirement	Tax Increment Allocated	Amount Exempted	Deferral Repayment	Tax Incr. Deposited to Hsng Fund	Percent of Tax Incr Dep	Repayment Deferrals	Other Income	Total Deposited to Housing
MERGED PROJECT AREA	\$194,929,441	\$38,985,888	\$38,985,888	\$0	\$0	\$38,985,888	20.00%	\$0	\$73,445,718	\$112,431,606
Agency Totals:	\$194,929,441	\$38,985,888	\$38,985,888	\$0	\$0	\$38,985,888	20.00%	\$0	\$73,445,718	\$112,431,606

Note: Print this report in Landscape Orientation (Use the Print Icon just above, then Properties then Landscape)

California Redevelopment Agencies - Fiscal Year 2008/2009
 Sch A/B Project Area Program Information
SAN JOSE

Project Area: **MERGED PROJECT AREA**

UNITS LOST

	<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Moderate</u>	<u>Total</u>
<u>Reporting Period: Current</u>					
<u>Redevelopment</u>					
Category Households Removed - Non Elderly	4	0	0	0	4
<u>Reporting Period: Next</u>					
<u>Other</u>					
Category Households Permanently Displaced - Non Elderly	96	0	0	0	96

REPLACEMENT HOUSING PLAN

<u>Report Period</u>	<u>Custodian Name</u>	<u>Adoption Date</u>
Current	Associated Right of Way Services	27-JAN-09
Next	Associated Right of Way Services	30-JAN-10
	Associated Right of Way Services	27-JAN-09

FUTURE UNIT CONSTRUCTION

<u>Contract Name</u>	<u>Execution Date</u>	<u>Estimated Completion Date</u>	<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Total</u>
Habitat for Humanity/Delmas, Jerome, Fuller	02/06/07	12/31/11	1	0	0	1

OWNER-OCCUPIED UNITS

	<u>Report Year</u>	<u>Amount</u>	<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Total</u>
Sales:	2008/2009	\$363,623	0	1	4	5

California Redevelopment Agencies - Fiscal Year 2008/2009
 Sch A/B Project Area Program Information
SAN JOSE

Project Area: **OUTSIDE PROJECT AREA**

UNITS LOST

<u>Reporting Period: Current</u> <u>Redevelopment</u>	<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Moderate</u>	<u>Total</u>
Category Households Removed - Non Elderly	1	0	0	0	1

REPLACEMENT HOUSING PLAN

<u>Report Period</u>	<u>Custodian Name</u>	<u>Adoption Date</u>
Current	Associated Right of Way Services	02-DEC-08

FUTURE UNIT CONSTRUCTION

<u>Contract Name</u>	<u>Execution Date</u>	<u>Estimated Completion Date</u>	<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Total</u>
Bill Wilson Center/The Commons	08/04/08	12/31/09	21	6	1	28
ROEM/Corde Terra Seniors	05/19/08	11/01/09	199	0	2	201

OWNER-OCCUPIED UNITS

<u>Report Year:</u>	<u>Amount</u>	<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Total</u>
Sales: 2008/2009	\$249,311	0	0	5	5

Agency parcels acquired

ADDRESS

APN #	No.	Dir.	Street	Site Description	Proj. Area	Acq. Date
25929041	456		Autumn St	SFR	Julian Stockton	4/10/2009
46764001	88	E	San Fernando St	88 Parking Garage	San Antonio Plz	8/27/2009
46764002	88	E	San Fernando St	88 Parking Garage	San Antonio Plz	8/27/2009
56752028	5647		Gallup	Four-plex	Hoffman Via Monte	9/10/2008
56752029	1171		Mesa	Four-plex	Hoffman Via Monte	12/5/2008
25928028	610	W	Julian	Westinghouse	Julian Stockton	2/3/2009

Agency parcels sold or transferred

ADDRESS

APN #	No.	Dir.	Street	Site Description	Proj. Area	Acq. Date
48610090	1696		Story	Vacant	Story/King	2/27/2009
48610093	1101		King	Vacant	Story/King	2/27/2009
46763079	25	S	Third	Globe Public Parking	Century Center	2/4/2009

California Redevelopment Agencies - Fiscal Year 2008/2009
 Status of Low and Moderate Income Housing Funds
 Sch. C Agency Financial Summary
 SAN JOSE

Adjusted Beginning Balance	Project Area Receipts	Agency Other Revenue	Total Expenses	Net Resources Available	Other Housing Fund Assets	Total Housing Fund Assets	Encumbrances	* Unencumbered Balance	Unencumbered Designated	Unencumbered Not Dsgntd
\$34,335,240	\$112,431,606	\$0	\$95,744,738	\$51,022,108	\$0	\$51,022,108	\$50,776,670	\$245,438	\$0	\$245,438

Expenses	Debt Service	Housing Construction	Housing Rehabilitation	Planning and Administration Costs	Property Acquisition	Subsidies	Total
2008/2009	\$20,914,626	\$15,189,234	\$1,093,192	\$14,885,827	\$35,735,517	\$7,926,342	\$95,744,738

*The Unencumbered Balance is equal to Net Resources Available minus Encumbrances

Note: Print this report in Landscape Orientation (Use the Print Icon just above, then Properties then Landscape)

California Redevelopment Agencies - Fiscal Year 2008/2009
Status of Low and Moderate Income Housing Funds
Sch C Agency Financial and Program Detail
SAN JOSE

	Beginning Balance	\$34,335,240
	Adjustment to Beginning Balance	\$0
	Adjusted Beginning Balance	\$34,335,240
Total Tax Increment From PA(s)	\$38,985,888	
	Total Receipts from PA(s)	\$112,431,606
	Other Revenues not reported on Schedule A	\$0
	Sum of Beginning Balance and Revenues	\$146,766,846

<u>Expenditure</u>	<u>Item</u>	<u>Subitem</u>	<u>Amount</u>	<u>Remark</u>
Debt Service				
	Interest Expense		\$292,886	
	Other		\$20,621,740	Debt Service payment
		Subtotal of Debt Service	\$20,914,626	
Housing Construction				
			\$15,189,234	
		Subtotal of Housing Construction	\$15,189,234	
Housing Rehabilitation				
			\$1,093,192	
		Subtotal of Housing Rehabilitation	\$1,093,192	
Planning and Administration Costs				
	Administration Costs		\$14,885,827	
		Subtotal of Planning and Administration Costs	\$14,885,827	
Property Acquisition				
	Acquisition Expense		\$35,548,167	
	Relocation Costs		\$187,350	
		Subtotal of Property Acquisition	\$35,735,517	

California Redevelopment Agencies - Fiscal Year 2008/2009
 Status of Low and Moderate Income Housing Funds
 Sch C Agency Financial and Program Detail
 SAN JOSE

Expenditure			
<u>Item</u>	<u>Subitem</u>	<u>Amount</u>	<u>Remark</u>
Subsidies from the LMIHF			
1st Time Homebuyer Down Payment Assistance		\$7,926,342	
	Subtotal of Subsidies from the LMIHF	\$7,926,342	
	Total Expenditures	\$95,744,738	

Net Resources Available \$51,022,108

Indebtedness For Setasides Deferred \$0

Other Housing Fund Assets		
<u>Category</u>	<u>Amount</u>	<u>Remark</u>
Total Other Housing Fund Assets		

Total Fund Equity \$51,022,108

2004/2005	\$29945042			
2005/2006	\$30013987			
2006/2007	\$32304378	sum of 4 Previous Years' Tax Increment for 2008/2009	Prior Year Ending Unencumbered Balance	Excess Surplus for 2008/2009
2007/2008	\$37039821	\$129303228	\$401,775	\$0

Sum of Current and 3 Previous Years' Tax Increments \$138,344,074

Adjusted Balance \$245,438

Excess Surplus for next year \$0

Net Resources Available \$51,022,108

Unencumbered Designated \$0

Unencumbered Undesignated \$245,438

Total Encumbrances \$50,776,670

Unencumbered Balance \$245,438

Unencumbered Balance Adjusted for Debt Proceeds \$0

Unencumbered Balance Adjusted for Land Sales \$0

Excess Surplus Expenditure Plan No

Excess Surplus Plan Adoption Date

California Redevelopment Agencies - Fiscal Year 2008/2009
 Status of Low and Moderate Income Housing Funds
 Sch C Agency Financial and Program Detail
 SAN JOSE

Site Improvement Activities Benefiting Households				
<u>Income Level</u>	<u>Low</u>	<u>Very Low</u>	<u>Moderate</u>	<u>Total</u>

Land Held for Future Development					
<u>Site Name</u>	<u>Num Of Acres</u>	<u>Zoning</u>	<u>Purchase Date</u>	<u>Estimated Start Date</u>	<u>Remark</u>
Sycamore Terrace	.92	Residen tial	02/16/1996	01/30/2012	Developer looking for construction lender
Sycamore Terrace	.51	Residen tial	08/15/2001	01/30/2012	Developer looking for construction lender
Ford and Monterey	3.05	R-1-1	10/30/2006	12/30/2010	Eden Housing selected as Developer of property
Willow Glen Woods	5	Light industri al	12/30/2002	01/30/2011	Awaiting predevelopment funds
Willow Glen Woods	.94	Light industri al	10/30/2002	01/30/2012	For-Sale project, awaiting market improvement

Use of the Housing Fund to Assist Mortgageors

Income Adjustment Factors	<input type="text"/>	Requirements Completed	<input type="text"/>
Home	\$2,114,495	Hope	\$ <input type="text"/>

Non Housing Redevelopment Funds Usage

Other funding resources to leverage city investment.

Resource Needs

LMIHF Deposits/Withdrawals				
<u>Document Name</u>	<u>Document Date</u>	<u>Custodian Name</u>	<u>Custodian Phone</u>	<u>Copy Source</u>

Achievements

Description
 New Construction to Rent
 Agency Name: City of San Jose Housing Department
 Agency Contact: Kristen Clements
 Telephone Number for the Project: (408) 535-8236

DESCRIPTION
 Casa Feliz Studios, located in downtown San Jose, is a 60 unit Single Room Occupancy (SRO) rental building serving extremely low income tenants (20-35% AMI). These energy-efficient SROs provide private bathrooms and kitchens on this infill site near transit. The four story building has one level of parking below, a courtyard with a front porch, and landscaped common areas front and back. This building was designed to replace an

California Redevelopment Agencies - Fiscal Year 2008/2009
Status of Low and Moderate Income Housing Funds
Sch C Agency Financial and Program Detail
SAN JOSE

Achievements

Description

existing SRO and to enhance the surrounding neighborhood.

The tight, 0.4 acre infill site with a requirement of 60 replacement units dictated an extremely creative, efficient design. The small, tight parcel required taking advantage of every opportunity to provide natural light, particularly into the interior core, common spaces. Another priority was the provision of as much natural ventilation and toxic-free building materials as possible. Each unit has its own ventilation system with linoleum flooring, low VOC-emitting adhesives and non-urea formaldehyde built in cabinets. Casa Feliz is registered as a LEED NC 2.2 project and is expected to achieve LEED NC Gold.

Casa Feliz green building strategies include:

- Forbo Linoleum (Marmoleum) Floors
- Shaw Ecoworx recycled content carpet
- Bamboo floors in common area
- Over 90% construction waste recycling
- All low flow plumbing fixtures
- All water based low-VOC emitting adhesives
- Recycled content "Fiber Force" fence boards
- Non-formaldehyde, and low-VOC emitting cabinets
- Forest Stewardship Council certified sustainably
- Harvested ironwood site benches
- 99% recyclable Steelcase office chairs
- 16.1 Kw Photovoltaic System
- Casa Feliz is a non-smoking building
- Vegetated roof supplying a wildlife habitat

Twenty-one (or 35%) of the units are set aside for residents with developmental disabilities. Services for Casa Feliz residents with developmental disabilities will be provided through the San Andreas Regional Center. Housing Choices Coalition will provide Resident Services Coordination to Casa Feliz residents with developmental disabilities, and facilitate communication between these residents and property management. This population is in extreme need of housing, and the developmentally disabled tenants rely upon public transit and do not drive automobiles. Residents are provided with a free, annual Eco Pass for county-wide buses and light rail transportation, and therefore the buildings' parking requirement is for twenty-two parking spaces. These parking spaces are provided below the building in a naturally ventilated below grade garage.

Construction was financed by tax credits, tax-exempt bond financing from U.S. Bank (\$10.5 million) and residual receipts loans and grants from the City of San Jose (\$1,000,000 w/a \$150,000 grant), AHP (\$400,000), and the State of California (\$1,171,000). The General Partner contributed to the construction budget in the form of deferred developer fee to ensure that the required \$15.6 million of construction funds were available.

HISTORY

The original Casa Feliz was built in 1960 as one of the first privately developed fraternity houses in the City of San Jose. In the 1990's, it was converted to a 60 unit SRO with group bathrooms and communal kitchen to serve low income recipients of mental health services. The non-profit group who was General Partner of Casa Feliz went into bankruptcy in the late 1990's and the building was managed for over seven years in this condition. The building fell into severe disrepair and became an eyesore for the host neighborhood.

In 2003, First Community Housing formed a partnership with the John Stewart Company, who was managing the building, to replace the existing building with a new SRO residential structure and to continue providing housing to at-risk populations. Owing to state law that requires a unit to unit replacement in affordable housing, Casa Feliz was re-designed with 60 units including a one bedroom Manager's Apartment and 59 SRO units averaging 255 square feet each. Each unit has a full bath, easily adapted to full accessibility at a tenant's request, and a kitchenette and built in cabinets. Because the zoning in this neighborhood limited building height to three stories, a special zoning variance was required in order to construct a four-story building that could house 60

California Redevelopment Agencies - Fiscal Year 2008/2009
Status of Low and Moderate Income Housing Funds
Sch C Agency Financial and Program Detail
SAN JOSE

Achievements

Description

units. All former residents were relocated with assistance from the City of San Jose Housing Department and The John Stewart Company. FCH held community outreach and focus group workshops in anticipation of the design effort because there had been some neighborhood concern about how the building would affect the historic fabric of the neighborhood. After several neighborhood meetings with the architect, it was decided that a more contemporary building would add new energy to the neighborhood.

Preliminary meetings with the City Public Works Department resulted in a requirement to replace and upgrade the existing storm sewer to a 100 year flood capacity for an estimated cost of over \$300,000. A vegetated roof was looked at as a way of mitigating the storm sewer requirement. Preliminary analysis showed that the installation of a living roof could reduce the storm water runoff to such an extent that only a new 10 year event pipe would be required and this could be accomplished, equivalent to or less than the 100 year storm sewer upgrade.

AGENCY ROLE AND ACHIEVEMENT

On February 15, 2005, in conformance with State relocation law, the City of San Jose Housing Department implemented the Relocation Plan for the then-current residents of Casa Feliz in an amount not to exceed \$1,020,000. There were 68 residents and former residents involved in the relocation, including 16 individuals 55 years of age or older. All residents were successfully relocated by September 1, 2005 and the property was vacated, closed, and secured; many of the former residents continue to receive relocation payments.

In addition, Casa Feliz received a \$1,000,000 loan and a \$150,000 Workforce Housing Grant from the City of San Jose to install a photovoltaic system at Casa Feliz. The grid-tied Photovoltaic system has a maximum peak output of 16.1 Kw (AC) and a CEC-Rated output of 14.27 Kw(AC), when adjusted for site conditions and panel and inverter efficiency. The system is designed to cover up to 6% of the property's common area electric load, which could save the property approximately \$4,460 per year in utility costs, based on a net time-of-use metering rate from PG&E. This reduction in the property's operating costs translates directly into increased financial stability at the property and helps keep the rents at the community as low as possible.

The 70 180w photovoltaic panels are located on the roof and the inverter and other equipment are located in the electrical room in the parking garage. A web based monitoring system shows how much electricity the system is providing at any given moment in time. This easily accessible information effectively monitors and maintains the system, catching any potential maintenance issues that might create a dip in production. There is a monitor in the community room specifically to inform residents and visitors to remind people about energy conservation.

California Redevelopment Agencies - Fiscal Year 2008/2009
Sch D General Project Information
SAN JOSE

Project Area Name: **MERGED PROJECT AREA**

Project Name: Casa Feliz
Address: 525 South Ninth Street San Jose 95112
Owner Name: First Community Housing/The Jon Stewart Company

SPECIAL NEEDS UNITS

<u>Category</u>	<u>Sub Category</u>	<u>Count</u>
Special Need Unit	Special Needs	21
Special Need Unit	Disabled (Mental)	21

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Replacement</u>								
<u>Bedroom</u>								
New Construction								
Non-Agency	Rental	1 Bedroom	59	1	0	0	0	60
Bedroom Total			59	1	0	0	0	60
<u>Replacement</u>								
<u>Unit</u>								
New Construction								
Non-Agency	Rental	Non-Elderly	59	1	0	0	0	60
Unit Total			59	1	0	0	0	60

PROJECT FUNDING SOURCE

<u>Funding Source</u>	<u>Amount</u>
Redevelopment Funds	\$1,168,000
State Funds	\$8,204,785
Private Funds	\$400,000
Owner Equity	\$318,359
TCAC/Federal Award	\$6,255,699

California Redevelopment Agencies - Fiscal Year 2008/2009
Sch D General Project Information
SAN JOSE

Project Area Name: **MERGED PROJECT AREA**

Project Name: **Housing Rehabilitation Program**

Address: **SNI Areas San Jose**

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Other Provided with LMIHF</u>								
<u>Unit</u>								
Mobilehome Owner, Resident								
Non-Agency	Owner	Elderly	0	1	0	0	0	1
Non-Substantial Rehabilitation								
Non-Agency	Owner	Non-Elderly	9	4	0	0	0	13
Non-Agency	Owner	Elderly	15	2	0	0	0	17
Unit Total			24	7	0	0	0	31

Project Name: **Vista on San Carlos**

Address: **1523 West San Carlos Street San Jose 95126**

Owner Name: **ROEM**

NON ASSISTED PROJECT UNITS

<u>Category</u>	<u>vlow</u>	<u>low</u>	<u>mod</u>	<u>amod</u>	<u>Building Permit Number</u>	<u>Building Permit Date</u>
New Constructions	0	0	0	16	2007023413	23-AUG-07
					2005002413	24-JAN-05
					2007023407	23-AUG-07
					2007023402	23-AUG-07
					2007023409	23-AUG-07
					2007023414	23-AUG-07

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Inclusionary</u>								
<u>Unit</u>								
New Construction								
Non-Agency	Owner	Non-Elderly	0	0	16	0	0	16
Unit Total			0	0	16	0	0	16

PROJECT FUNDING SOURCE

<u>Funding Source</u>	<u>Amount</u>
Redevelopment Funds	\$4,851,000

California Redevelopment Agencies - Fiscal Year 2008/2009
 Sch D General Project Information
 SAN JOSE

Project Area Name: **OUTSIDE PROJECT AREA**

Project Name: **Curtner Studios**
 Address: **701 Curtner Avenue San Jose 95125**
 Owner Name: **First Community Housing**

SPECIAL NEEDS UNITS

<u>Category</u>	<u>Sub Category</u>	<u>Count</u>
Special Need Unit	Special Needs	27
Special Need Unit	Disabled (Mental)	27

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Inclusionary</u>								
<u>Unit</u>								
Substantial Rehabilitation Pre 1994								
Non-Agency	Rental	Non-Elderly	165	13	1	0	0	179
Unit Total			165	13	1	0	0	179

PROJECT FUNDING SOURCE

<u>Funding Source</u>	<u>Amount</u>
Federal Funds	\$5,042,845
Other Local Funds	\$1,350,000
Private Funds	\$9,688,479
Owner Equity	\$413,084
TCAC/Federal Award	\$4,435,776

California Redevelopment Agencies - Fiscal Year 2008/2009
Sch D General Project Information
SAN JOSE

Project Area Name: **OUTSIDE PROJECT AREA**

Project Name: **Homebuyer Assistance Program**

Address: **various**

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Other Provided with LMIHF</u>								
			<u>Unit</u>					
Subsidy								
Non-Agency	Owner	Non-Elderly	0	0	113	0	0	113
<u>Other Provided without LMIHF</u>								
			<u>Unit</u>					
Subsidy								
Non-Agency	Owner	Non-Elderly	0	18	95	0	0	113
Unit Total			0	18	208	0	0	226

PROJECT FUNDING SOURCE

<u>Funding Source</u>	<u>Amount</u>
Redevelopment Funds	\$6,636,795
Federal Funds	\$903,000
State Funds	\$2,850,000

Project Name: **Housing Rehabilitation Program**

Address: **Outside RDA Project Areas San Jose**

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Other Provided with LMIHF</u>								
			<u>Unit</u>					
Acquisition Only								
Non-Agency	Owner	Elderly	5	0	0	0	0	5
Non-Agency	Owner	Non-Elderly	4	0	0	0	0	4
Non-Substantial Rehabilitation								
Non-Agency	Owner	Elderly	13	6	0	0	0	19
Non-Agency	Owner	Non-Elderly	3	2	0	0	0	5
Unit Total			25	8	0	0	0	33

California Redevelopment Agencies - Fiscal Year 2008/2009
Sch D General Project Information
SAN JOSE

Project Area Name: **OUTSIDE PROJECT AREA**

Project Name: **Murphy/Ringwood**
Address: **s/w corner of Murphy Ave. and Ringwood Ave. San Jose 95131**
Owner Name: **Habitat for Humanity**

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Inclusionary</u>								
		<u>Unit</u>						
New Construction								
Non-Agency	Owner	Non-Elderly	11	0	0	0	0	11
Unit Total			11	0	0	0	0	11

PROJECT FUNDING SOURCE

<u>Funding Source</u>	<u>Amount</u>
Redevelopment Funds	\$1,238,000

Project Name: **San Jose State University Faculty Homebuyer**
Address: **Program Various**

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Other Provided with LMIHF</u>								
		<u>Unit</u>						
Subsidy								
Non-Agency	Owner	Non-Elderly	0	0	5	0	0	5
<u>Other Provided without LMIHF</u>								
		<u>Unit</u>						
Subsidy								
Non-Agency	Owner	Non-Elderly	0	0	7	0	0	7
Unit Total			0	0	12	0	0	12

PROJECT FUNDING SOURCE

<u>Funding Source</u>	<u>Amount</u>
Redevelopment Funds	\$300,000
Other Local Funds	\$420,000

California Redevelopment Agencies - Fiscal Year 2008/2009
 Sch D General Project Information
 SAN JOSE

Project Area Name: **OUTSIDE PROJECT AREA**

Project Name: **Teacher Homebuyer Program**

Address: **Various**

UNIT INVENTORY

			<u>Very Low</u>	<u>Low</u>	<u>Moderate</u>	<u>Above Mod</u>	<u>Became Ineligible</u>	<u>Total</u>
<u>Other Provided with LMIHF</u>								
<u>Unit</u>								
Subsidy								
Non-Agency	Owner	Non-Elderly	0	0	49	0	0	49
<u>Other Provided without LMIHF</u>								
<u>Unit</u>								
Subsidy								
Non-Agency	Owner	Non-Elderly	0	19	0	0	0	19
Unit Total			0	19	49	0	0	68

PROJECT FUNDING SOURCE

<u>Funding Source</u>	<u>Amount</u>
Redevelopment Funds	\$2,605,000
Federal Funds	\$945,000

SCHEDULE HCD E
CALCULATION OF INCREASE IN AGENCY'S INCLUSIONARY OBLIGATION FOR ACTIVITIES
 (This Form is Information Only: Actual Obligation is based on Implementation Plan)

Report Year: 2008/2009

Agency: SAN JOSE

NOTE: This form is a summary of the totals of all new construction or substantial rehabilitation units from forms HCD-D7 which are developed in a project area by any entity (agency or non-agency).

PART I [H & SC Section 33413(b)(1)] AGENCY DEVELOPED	
1. New Units	0
2. Substantially Rehabilitated Units	0
3. Subtotal - Baseline of Units (add line 1 & 2)	0
4. Subtotal of Inclusionary Obligation Accrued this Year for Units (line 3 x 30%)	0
5. Subtotal of Inclusionary Obligation Accrued this year for <u>Very-Low</u> Income Units (line 4 x 50%)	0
PART II [H & SC Section 33413(b)(2)] NON-AGENCY DEVELOPED UNITS	
6. New Units	188
7. Substantially Rehabilitated Units	7
8. Subtotal - Baseline of Units (add lines 6 & 7)	195
9. Subtotal of Inclusionary Obligation Accrued this year for Units (line 8 x 15%)	29
10. Subtotal of Inclusionary Obligation Accrued this year for Very Low Income Units (line 9 x 40%)	11
PART III TOTALS	
11. Total Increase in Inclusionary Obligations During This Fiscal Year (add line 4 & 9)	29
12. Total Increase in Very Low Income Units Inclusionary Obligations During This Fiscal Year (add line 5 & 10)	11

**SCHEDULE HCD E1
CALCULATION OF INCREASE IN AGENCY'S INCLUSIONARY OBLIGATION FOR ACTIVITIES
(This Form is Information Only: Actual Obligation is based on Implementation Plan)**

Report Year: 2008/2009

Agency: SAN JOSE

Project Area: MERGED PROJECT AREA

Project: CASA FELIZ

NOTE: This form is a summary of the totals of all new construction or substantial rehabilitation units from forms HCD-D7 which are developed in a project area by any entity (agency or non-agency).

PART I [H & SC Section 33413(b)(1)] AGENCY DEVELOPED	
1. New Units	0
2. Substantially Rehabilitated Units	0
3. Subtotal - Baseline of Units (add line 1 & 2)	0
4. Subtotal of Inclusionary Obligation Accrued this Year for Units (line 3 x 30%)	0
5. Subtotal of Inclusionary Obligation Accrued this year for Very-Low Income Units (line 4 x 50%)	0
PART II [H & SC Section 33413(b)(2)] NON-AGENCY DEVELOPED UNITS	
6. New Units	60
7. Substantially Rehabilitated Units	0
8. Subtotal - Baseline of Units (add lines 6 & 7)	60
9. Subtotal of Inclusionary Obligation Accrued this year for Units (line 8 x 15%)	9
10. Subtotal of Inclusionary Obligation Accrued this year for Very-Low Income Units (line 9 x 40%)	4
PART III TOTALS	
11. Total Increase in Inclusionary Obligations During This Fiscal Year (add line 4 & 9)	9
12. Total Increase in Very-Low Income Units Inclusionary Obligations During This Fiscal Year (add line 5 & 10)	4

SCHEDULE HCD E1
CALCULATION OF INCREASE IN AGENCY'S INCLUSIONARY OBLIGATION FOR ACTIVITIES
 (This Form is Information Only: Actual Obligation is based on Implementation Plan)

Report Year: 2008/2009

Agency: SAN JOSE

Project Area: MERGED PROJECT AREA

Project: MODERN ICE

NOTE: This form is a summary of the totals of all new construction or substantial rehabilitation units from forms HCD-D7 which are developed in a project area by any entity (agency or non-agency).

PART I [H & SC Section 33413(b)(1)] AGENCY DEVELOPED	
1. New Units	0
2. Substantially Rehabilitated Units	0
3. Subtotal - Baseline of Units (add line 1 & 2)	0
4. Subtotal of Inclusionary Obligation Accrued this Year for Units (line 3 x 30%)	0
5. Subtotal of Inclusionary Obligation Accrued this year for <u>Very-Low</u> Income Units (line 4 x 50%)	0
PART II [H & SC Section 33413(b)(2)] NON-AGENCY DEVELOPED UNITS	
6. New Units	40
7. Substantially Rehabilitated Units	0
8. Subtotal - Baseline of Units (add lines 6 & 7)	40
9. Subtotal of Inclusionary Obligation Accrued this year for Units (line 8 x 15%)	6
10. Subtotal of Inclusionary Obligation Accrued this year for Very Low Income Units (line 9 x 40%)	2
PART III TOTALS	
11. Total Increase in Inclusionary Obligations During This Fiscal Year (add line 4 & 9)	6
12. Total Increase in Very Low Income Units Inclusionary Obligations During This Fiscal Year (add line 5 & 10)	2

**SCHEDULE HCD E1
CALCULATION OF INCREASE IN AGENCY'S INCLUSIONARY OBLIGATION FOR ACTIVITIES
(This Form is Information Only: Actual Obligation is based on Implementation Plan)**

Report Year: 2008/2009

Agency: SAN JOSE

Project Area: MERGED PROJECT AREA

Project: ONE EAST @ JULIAN

NOTE: This form is a summary of the totals of all new construction or substantial rehabilitation units from forms HCD-D7 which are developed in a project area by any entity (agency or non-agency).

PART I [H & SC Section 33413(b)(1)] AGENCY DEVELOPED	
1. New Units	0
2. Substantially Rehabilitated Units	0
3. Subtotal - Baseline of Units (add line 1 & 2)	0
4. Subtotal of Inclusionary Obligation Accrued this Year for Units (line 3 x 30%)	0
5. Subtotal of Inclusionary Obligation Accrued this year for Very-Low Income Units (line 4 x 50%)	0
PART II [H & SC Section 33413(b)(2)] NON-AGENCY DEVELOPED UNITS	
6. New Units	8
7. Substantially Rehabilitated Units	0
8. Subtotal - Baseline of Units (add lines 6 & 7)	8
9. Subtotal of Inclusionary Obligation Accrued this year for Units (line 8 x 15%)	1
10. Subtotal of Inclusionary Obligation Accrued this year for Very Low Income Units (line 9 x 40%)	0
PART III TOTALS	
11. Total Increase in Inclusionary Obligations During This Fiscal Year (add line 4 & 9)	1
12. Total Increase in Very Low Income Units Inclusionary Obligations During This Fiscal Year (add line 5 & 10)	0

**SCHEDULE HCD E1
CALCULATION OF INCREASE IN AGENCY'S INCLUSIONARY OBLIGATION FOR ACTIVITIES
(This Form is Information Only: Actual Obligation is based on Implementation Plan)**

Report Year: 2008/2009

Agency: SAN JOSE

Project Area: MERGED PROJECT AREA

Project: SAINTE CLAIRE BUILDING

NOTE: This form is a summary of the totals of all new construction or substantial rehabilitation units from forms HCD-D7 which are developed in a project area by any entity (agency or non-agency).

PART I [H & SC Section 33413(b)(1)] AGENCY DEVELOPED	
1. New Units	0
2. Substantially Rehabilitated Units	0
3. Subtotal - Baseline of Units (add line 1 & 2)	0
4. Subtotal of Inclusionary Obligation Accrued this Year for Units (line 3 x 30%)	0
5. Subtotal of Inclusionary Obligation Accrued this year for Very-Low Income Units (line 4 x 50%)	0
PART II [H & SC Section 33413(b)(2)] NON-AGENCY DEVELOPED UNITS	
6. New Units	0
7. Substantially Rehabilitated Units	7
8. Subtotal - Baseline of Units (add lines 6 & 7)	7
9. Subtotal of Inclusionary Obligation Accrued this year for Units (line 8 x 15%)	1
10. Subtotal of Inclusionary Obligation Accrued this year for Very Low Income Units (line 9 x 40%)	0
PART III TOTALS	
11. Total Increase in Inclusionary Obligations During This Fiscal Year (add line 4 & 9)	1
12. Total Increase in Very Low Income Units Inclusionary Obligations During This Fiscal Year (add line 5 & 10)	0

**SCHEDULE HCD E1
CALCULATION OF INCREASE IN AGENCY'S INCLUSIONARY OBLIGATION FOR ACTIVITIES
(This Form is Information Only: Actual Obligation is based on Implementation Plan)**

Report Year: 2008/2009

Agency: SAN JOSE

Project Area: MERGED PROJECT AREA

Project: SKYLINE @ TAMIEN STATION

NOTE: This form is a summary of the totals of all new construction or substantial rehabilitation units from forms HCD-D7 which are developed in a project area by any entity (agency or non-agency).

**PART I
[H & SC Section 33413(b)(1)]
AGENCY DEVELOPED**

1. New Units	0
2. Substantially Rehabilitated Units	0
3. Subtotal - Baseline of Units (add line 1 & 2)	0
4. Subtotal of Inclusionary Obligation Accrued this Year for Units (line 3 x 30%)	0
5. Subtotal of Inclusionary Obligation Accrued this year for Very-Low Income Units (line 4 x 50%)	0

**PART II
[H & SC Section 33413(b)(2)]
NON-AGENCY DEVELOPED UNITS**

6. New Units	48
7. Substantially Rehabilitated Units	0
8. Subtotal - Baseline of Units (add lines 6 & 7)	48
9. Subtotal of Inclusionary Obligation Accrued this year for Units (line 8 x 15%)	7
10. Subtotal of Inclusionary Obligation Accrued this year for Very Low Income Units (line 9 x 40%)	3

**PART III
TOTALS**

11. Total Increase in Inclusionary Obligations During This Fiscal Year (add line 4 & 9)	7
12. Total Increase in Very Low Income Units Inclusionary Obligations During This Fiscal Year (add line 5 & 10)	3

**SCHEDULE HCD E1
CALCULATION OF INCREASE IN AGENCY'S INCLUSIONARY OBLIGATION FOR ACTIVITIES
(This Form is Information Only: Actual Obligation is based on Implementation Plan)**

Report Year: 2008/2009

Agency: SAN JOSE

Project Area: MERGED PROJECT AREA

Project: VISTA ON SAN CARLOS

NOTE: This form is a summary of the totals of all new construction or substantial rehabilitation units from forms HCD-D7 which are developed in a project area by any entity (agency or non-agency).

**PART I
[H & SC Section 33413(b)(1)]
AGENCY DEVELOPED**

1. New Units	0
2. Substantially Rehabilitated Units	0
3. Subtotal - Baseline of Units (add line 1 & 2)	0
4. Subtotal of Inclusionary Obligation Accrued this Year for Units (line 3 x 30%)	0
5. Subtotal of Inclusionary Obligation Accrued this year for Very-Low Income Units (line 4 x 50%)	0

**PART II
[H & SC Section 33413(b)(2)]
NON-AGENCY DEVELOPED UNITS**

6. New Units	32
7. Substantially Rehabilitated Units	0
8. Subtotal - Baseline of Units (add lines 6 & 7)	32
9. Subtotal of Inclusionary Obligation Accrued this year for Units (line 8 x 15%)	5
10. Subtotal of Inclusionary Obligation Accrued this year for Very Low Income Units (line 9 x 40%)	2

**PART III
TOTALS**

11. Total Increase in Inclusionary Obligations During This Fiscal Year (add line 4 & 9)	5
12. Total Increase in Very-Low Income Units Inclusionary Obligations During This Fiscal Year (add line 5 & 10)	2

Redevelopment Agency City of San Jose

General Footnotes to Annual HCD Report FY Ended 6/30/09

Schedule A Page 1 of 1 "Other Income"

In order to raise capital to finance affordable housing projects, short- and long-term strategies are utilized. During FY 08-09 \$73,445,718 in "Other Income" is made up of the following amounts:

Interest Income	\$867,790
Rent Income	\$44,976
Loan Repayments	\$21,096,194
Debt Proceeds	\$0
Line of Credit Draw	\$51,436,758

Schedules A/B, Pages 1 & 2

(Housing Units Anticipated to be completed During the Next 2 Years)

Per HCD new instructions, once a project is reported here it is not to be reported in subsequent HCD Annual Reports. Agency will footnote any projects that are no longer expected to be developed or developed with fewer affordable units and will report only increases in these schedules.

Corde Terra Seniors was previously reported under Outside Project Area as having 68 very low and 131 low-income units. This unit mix has changed and is reflected in the FY 08-09 HCD report.

In prior years due to field restrictions on the HCD on-line database, the column titled "Execution Date" could not be entered if it were more than two years prior to the estimated completion date. Since most all Agency housing projects actually take longer than 24 months from date of execution of the development agreement to complete, HCD agreed to allow the input of incorrect execution dates that are less than two years for the stated completion dates in order to comply with the practical intent of this question. For the FY 2008-2009 report, this restriction was removed and execution dates greater than two years from the completion date are now entered into the on-line database. With the exception of Habitat for Humanity/Delmas, Jerome, Fuller and Bill Wilson Center/The Commons, execution date refers to the Date of Affordability Restriction Recordation. The funding committed date is entered for Habitat for Humanity/Delmas, Jerome, Fuller and Bill Wilson Center/The Commons.

(Displacement and losses over reporting year)

Gifford Avenue (4 VLI households) was inaccurately reported in the FY 07-08 report as being located outside of a project area.

(Estimate of Households Displaced over Current FY)

Markham Terrace (95 VLI SRO households) was inaccurately reflected in the FY 07-08 report as being located outside of a project area. It has been corrected in this year's report as located inside a project area. Also, 92 ELI SRO households at Markham Terrace were permanently displaced in FY 08-09 as opposed to 95 ELI SRO households reported under the "Project Area Households to be Permanently Displaced Over Current Fiscal Year" in the FY 07-08 report.

Updated the "Name of Agency Custodian" field to reflect the consultant that the City of San Jose Housing Department has contracted to manage the Department's relocation services.

Schedule C Page 2 of 5

"Prior Year Ending Unencumbered Balance"

The \$401,775 value in this category represents the cash balance in the Housing Department's Low and Moderate Income Housing Fund at the end of FY 2008-2009. This entire value was committed to upcoming new affordable housing development projects. A more appropriate characterization of this value is "Prior Year Ending Cash Balance."

Schedule C Page 1 of 1

"Unencumbered Not Designated"

The \$245,438 value represents unencumbered funds that are not designated for a specific purpose.

Schedule D, all pages

"Agency-Developed" vs. "Non-Agency Developed" Units

The current draft guidelines for the preparation of the report to HCD instruct preparers to call any housing development that involves redevelopment funds to be labeled as "Agency-Developed" Units. However, HCD has agreed to allow the Agency to categorize units developed by private developers using redevelopment funds as "Agency Assisted Non-Agency Developed". This categorization is consistent with previous years annual reporting to HCD.

Schedule D, all pages

"Elderly" Units

The HCD definition of "elderly" is in conflict with the definition of "senior" housing, as specified by the California Civil Code Section 51.3. Since state law requires compliance with the Civil Code in order to construct units restricted by age, the San José Housing Department uses that definition in reporting age restricted units. For example, HCD defines an "elderly" person as 60 years or older while the Civil Code defines a "senior citizen" as 62 years of age or older, or if residing in a qualified senior citizen housing development, 55 years or older. Additionally, for the purposes of this report, senior residents who were assisted through the City's housing rehabilitation programs are also indicated as "elderly" units.

"Manager" Units

Manager Units for 100% affordable rental housing developments are entered in the "MOD" category.

Schedule D, all pages

"Funding Sources" – Redevelopment Funds & Private Funds

"Redevelopment Funds" refers to the Low- and Moderate-Income Housing Fund (the 20% Funds) as well as 80% Funds provided by the Redevelopment Agency. HOME funds are being reported as "Federal Funds." The following funds are reported as "State Funds:" Prop 1C (Infill, TOD, MHP), EHAP, and Prop 46 funds. Funding from the County of Santa Clara Office of Affordable Housing, Affordable Housing Fund (AHF), are reported as "Other Local Funds." The following sources are reported as "Private Funds:" Senior loan, Housing Trust Fund, excess income, and Federal Home Loan Bank – AHP. Tax credit equity (Limited Partner) is reported under "TCAC/Federal Award." Deferred developer fee is reported under "Owner's Funds."

Schedule D-1 (not shown in the printable reports)
“Federally Assisted Housing Developments”

Schedule D-1 asks whether a particular development is a “federally assisted multi-family rental project.” Since the definition of that term includes the federal Low-Income Housing Tax Credit program (Section 42 of the Internal Revenue Code), virtually all development financed by the Housing Department are being reported in the on-line database as “federally assisted” since they received either 9% or 4% tax credits.

Schedule D-1 (not shown in printed reports)
“Term of Affordability Restriction”

The City's recorded affordability restrictions stipulate that the term of the restriction (generally 55 years for rental projects and 45 years for ownership projects) begins on the date that a Certificate of Occupancy/Notice of Completion is issued for the Assisted Unit or the date that the Assisted Unit is occupied, whichever occurs first. For purposes of recording the start date of the term of Affordability Restriction on Schedule D-1, either the first day of the month following the month of Certificate of Occupancy/Notice of Completion or the date that the first Assisted Unit is occupied, whichever occurs first, is used as the date that the restrictions would have become effective.

Schedule D, Outside Project Area, “Homeownership Program”

The Homeownership program refers to non-inclusionary units in which the City provided a subsidy to first-time homebuyers.

Schedule D, Merged & Outside Project Area,
“Housing Rehabilitation Program”

Under “Non-Agency Developed and Owner-Occupied,” the following loans and grants through the Housing Rehabilitation Program were reported under the following categories: “Substantial Rehabilitation Units” – HPP Loan, \$100,000; “Non-Substantial Rehabilitation Units” – Grants and Z-Loan - \$15,000; reported under Outside Project Area only, Mobile Home loans and grants.

Schedule D, Merged Project Area

“Casa Feliz”

Casa Feliz Studio Apartments is a tear down and rebuild of Casa Feliz Manor House. It was rebuilt as a 60 unit efficiency and is reflected as one bedroom apartments in the HCD report.

Schedule E

Schedule E is automatically generated by HCD's on line program from Agency's inputs in Schedule D. There is no real increase in the Agency inclusionary obligation from FY 07-08 activity because our Inclusionary Housing Policy along with the Housing Department's affordable projects provides that this Agency has more than the required number of inclusionary units to fulfill our obligation.