

Attachment 1

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Housing Office Strategic Plan

Affordable Housing Plan

Vision: To create a viable plan for increasing the production of affordable housing throughout Monterey County and understanding where the County's Inclusionary Housing Ordinance and Monterey County Local Housing Trust Fund (MCLHTF) fits into that plan.

- Request for proposal (RFP) to identify and select consulting firm/team to prepare plan.
 - Existing Conditions
 - Macro and microeconomic factors of housing development
 - How local conditions influence the macro and microeconomic factors and project viability
 - Identification of similar counties and how they address affordable housing and analysis of why their affordable housing strategies succeeded or failed.
 - Study will result in policy and program recommendations to stimulate private and public development across all affordability levels.
- Monterey County eligible for state and federal Pro Housing designation and grant programs

Monterey County Local Housing Trust Fund

Vision: MCLHTF as financial and physical resource fund to support affordable owner-occupied workforce housing and multifamily projects in a timely manner.

- Regional approach to maximize funding & project pipeline
 - How to approach cities to get buy-in to regional approach
 - Shared staffing resources to manage down payment assistance and housing rehabilitation programs
- Community Land Trust
 - Acquire property and lease to affordable housing owners, i.e. Una Nueva Esperanza model
 - Acquire natural resources, e.g. water rights, for use stimulating affordable housing production
- Ongoing recapitalization
- Implementation Steps
 - Governance
 - County of Monterey
 - Joint Powers Authority
 - Other non-profit board
 - Drafting program policies and procedures
 - Drafting program documentation
 - Program implementation

Inclusionary Housing Ordinance

Vision: Continue implementing the Inclusionary Housing Ordinance as is resulting in very few affordable units and some in-lieu fee revenue to capitalize the MCLHTF pending completion of Affordable Housing Plan

- Update in-lieu fees with existing Ordinance
- Update Administrative Manual to reflect experience over last 20-years
- Drafting Inclusionary Developer Agreements & agreements for density bonus and SB330/Builder's Remedy affordable units

Housing Office Strategic Plan

Kents Court

Vision: To maintain the property as a safe and stable place to live until the County disposes of the property.

- Property Manager RFP
- Short-term property management issues
 - Eugene Burger not responsive to returning rent proceeds or submitting invoices
 - Need on-site presence to collect rent and handle tenant work orders
 - Preventive Maintenance (PM) Schedule and implementation
 - Facilities is working on preparing this Schedule
 - May need to use Facilities/JOC contractors to perform PM
- Long-term property plans
 - Maintain as County owned
 - Transfer land to Community Land Trust, lease space to residents for \$1/year and sell units to residents with affordability restrictions on who can lease space.
 - Transfer to affordable housing developer to continue managing as affordable housing
 - Resident owned co-op manufactured home park
 - Relocate tenants & redevelop/sell property

Housing Program Development & Housing Element 6 Implementation Support

Vision: _____

- Strength, Weakness, Opportunity & Threat (SWOT) Analysis of policies (must identify specific elements of County Code and policies, not general statements), programs to identify specific areas that need to be addressed. The following are proposed main topic divisions for SWOT analysis.
 - Finance
 - Land Use Policies
 - Resources
- Water Allocation Policy Development
 - Leverage water credits to construct affordable units and market rate, what is appropriate “pricing” ratio?
 - Transfer of State Parks “unneeded” water allocation to MCLHTF for affordable housing in Monterey Peninsula Water Management District service area

Administration & Staff Management

Vision: _____

- Improve asset and grant management by implementing new software solutions (possible joint RFP/Qs with Monterey, Salinas, and Seaside):
 - Loan Servicing
 - Grant Management
 - Portfolio Management
- Develop written policies and procedures for the following operational areas:
 - Inclusionary Housing Developer Relations
 - Inclusionary Housing Owner Occupied Relations
 - Affordable Housing Monitoring
 - Community Development Block Grant (CDBG) application processing, review, recommendations, subrecipient management, and grant management.

Housing Office Strategic Plan

- Streamline preparation of affordable housing documents through preparation of new master templates and templates for program specific attachments, i.e., HOME or Permanent Local Housing Allocation funding.
 - Goldfarb Lipman is on retainer, and this included in contract scope of work.
 - May need additional, non-housing, funds to complete effort.

Reporting Activities

Vision of Housing Office as repository of housing production information and ability to analyze data to inform policy and program development

- Annual Housing Report
 - What is purpose of report?
 - Data dump to bring Board and community up to speed on what Housing has done
 - Data on affordable housing countywide
- 2025 Work Plan
- Portfolio management & reporting - Loan servicing software needed (working w/finance to select and have on-line 7/1/25)
- Annual Housing Element Annual Progress Report – Acella support
- Annual Department of Finance Housing Permit Report – Acella Support
- Current Data Collections
 - Affordable Housing Inventory – Multifamily
 - Affordable Housing Inventory – Owner Occupied
 - Housing Element APR Table A2 2018-2023 for all Monterey County Jurisdictions
 - Inclusionary Historic Data
 - Grant and Loan Master Lists
 - Housing Pipeline

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