

Workforce Housing Program

Property Manager Training

January 16, 2025

Agenda

- Welcome
- New topics:
 - On-line access for Property Managers to view list of occupied units
 - Upcoming BCC discussion of WHP topics (tentative date Feb 27, 2025)
- Ongoing WHP topics:
 - 2024 Income and Rent ranges
 - Income Eligibility requirement (Lease Addendum)
 - WHP Rent Compliance Review (WHP Rent Calculation Worksheet)
 - Mandatory/Optional fees
 - Low Occupancy
 - notices of non-compliance;
 - remedies options and suggestions for property managers
- Q and A

New items

- On-line Portal development
- Upcoming BCC discussion of WHP topics

Workforce Housing Units

Why does this project include Workforce Housing Units?

- 2006 Program, Density Bonuses

What is the Property Manager's Responsibility

- To rent the Workforce units to eligible households at a correct rent
- Manager discretion, within guardrails

What is the County's Responsibility?

- To ensure the workforce units are provided, and to support property managers and tenants

Income Eligibility

- Typically 4 categories, detailed in the WHP Restrictive Covenant
 - Low, Moderate 1, Moderate 2, Middle
- Definition of Annual Household Income:
 - documentable gross income before taxes received annually by income earners residing in the WHP tenant's household only.
 - at least one income earner must be employed in Palm Beach County.
 - does not include investment, retirement, or checking/savings account balances, but may include distributions to the WHP tenant from retirement accounts, and periodic determinable allowances such as alimony and child support.
 - irregular income such as overtime and bonus payments may be considered income at the discretion of the WHP rental unit owner or designee.
- Income certification is required at move-in and is optional lease at-renewal

Incomes and Rents

WHP Income Category			Studio	1 BR	2 BR	3BR	4BR
Low	60-80% of MFI	\$62,400 - \$83,200	\$1,125 – 1,500	\$1,205 - 1,607	\$1,446 - 1,928	\$1,671 - 2,228	\$1,864 - 2,486
Moderate 1	>80-100% of MFI	>\$83,200 - \$104,000	\$1,500 - 1,875	\$1,607 – 2,009	\$1,928 - 2,410	\$2,228 - 2,785	\$2,486 - 3,108
Moderate 2	>100-120% of MFI	\$104,000 - \$124,800	\$1,875 - 2,250	\$2,009 - 2,410	\$2,410 - 2,892	\$2,785 - 3,342	\$3,108 - 3,729
Middle	>120-140% of MFI	>\$124,800 - \$145,600	\$2,250 - 2,625	\$2,410 - 2,812	\$2,892 - 3,374	\$3,342 - 3,899	\$3,729- 4,350

Incomes and Rents - Deciles

Rental Prices for projects approved under the Workforce Housing code adopted August 22, 2019

WHP Income Category (% of Median Family Income)			Studio	1 BR	2 BR	3BR	4BR
Low	60-70%	\$62,400 - \$72,800	\$1,125 - \$1,313	\$1,205 - \$1,406	\$1,446 - \$1,687	\$1,671 - \$1,950	\$1,864 - \$2,175
	>70-80%	>\$72,800- \$83,200	\$1,313 - \$1,500	\$1,406 - \$1,607	\$1,687 - \$1,928	\$1,950 - \$2,228	\$2,175 - \$2,486
Moderate 1	>80-90%	>\$83,200 - \$93,600	\$1,500 - \$1,688	\$1,607 - \$1,808	\$1,928 - \$2,169	\$2,228 - \$2,507	\$2,486 - \$2,797
	>90-100%	>\$93,600- \$104,000	\$1,688 - \$1,875	\$1,808 - \$2,009	\$2,169 - \$2,410	\$2,507 - \$2,785	\$2,797 - \$3,108
Moderate 2	>100-110%	>\$104,000 - \$114,400	\$1,875 - \$2,063	\$2,009 - \$2,210	\$2,410 - \$2,651	\$2,785 - \$3,064	\$3,108 - \$3,419
	>110-120%	>\$114,400- \$124,800	\$2,063 - \$2,250	\$2,210 - \$2,410	\$2,651 - \$2,892	\$3,064 - \$3,342	\$3,419 - \$3,729
Middle	>120-130%	>\$124,800 - \$135,200	\$2,250 - \$2,438	\$2,410 - \$2,611	\$2,892 - \$3,133	\$3,342 - \$3,621	\$3,729 - \$4,040
	>130-140%	>\$135,200- \$145,600	\$2,438 - \$2,625	\$2,611 - \$2,812	\$3,133 - \$3,374	\$3,621 - \$3,899	\$4,040 - \$4,350

Lease Addendum

LEASE ADDENDUM FOR RENTAL UNIT PALM BEACH COUNTY WORKFORCE HOUSING PROGRAM

This addendum serves as written declaration and documents the income of the tenant(s) occupying a WHP rental unit, as verified by the property owner or designee.

1. At or before lease execution, but no later than ten (10) days after a tenant's lease period begins, this completed and executed Lease Addendum must be submitted by the property owner/designee to County Staff at PZB-WHPRentals@pbcgov.org for compliance determination. Property managers are encouraged to submit draft lease addenda (not executed) for preliminary review. Any issues identified in the compliance review are required to be addressed within ten (10) days.
2. Within three (3) days of compliance determination by County Staff, the property owner/designee must provide a copy of this addendum to the tenant at (enter tenant's email)

Development: _____

Unit Number: _____ Number of Bedrooms: _____ WHP Rent: \$ _____

Lease starts: _____ Lease ends: _____

This is an ☐ initial certification or a ☐ recertification.

Household Income is defined as the documentable gross income before taxes received annually by income earners residing in the WHP tenant's household, used to determine the Income Category and subcategory if applicable. At least one income earner must be employed in Palm Beach County. Household Income does not include investment, retirement, or checking/savings account balances, but may include distributions to the WHP tenant from retirement accounts, and periodic determinable allowances such as alimony and child support. Irregular income such as overtime and bonus payments may be considered at the discretion of the WHP rental unit owner or designee.

Identify each income earner in the household that will be occupying this unit. (add lines if needed)

Tenant's Name	Tenant's Annual Income
_____	_____
_____	_____
_____	_____
Total Household Income:	_____

2024 WHP Income Category (please check)

- ☐ Low (60-80% of MFI): \$62,400 - \$83,200
- ☐ Moderate-1 (>80-100% of MFI): >\$83,200 - \$104,000
- ☐ Moderate-2 (>100-120% of MFI): >\$104,000 - \$124,800
- ☐ Middle (>120-140% of MFI): >\$124,800 - \$145,600

For any questions, contact County WHP staff at PZB-WHPRentals@pbcgov.org or 561-233-5300.

Development: _____ Unit Number: _____

Under penalties of perjury, I declare that I have read the foregoing Lease Addendum for Rental Unit and that the facts stated in it are true.

Tenant(s)

_____ (Tenant Signature)	_____ (Tenant Signature)
_____ (Print Name)	_____ (Print Name)
_____ (Date)	_____ (Date)

Owner or Designee:

By: (Owner/Designee Signature) _____

Name: _____
(Print Name)

Title: _____

Date: _____

Lease Addendum - Deciles

LEASE ADDENDUM FOR RENTAL UNIT PALM BEACH COUNTY WORKFORCE HOUSING PROGRAM

This addendum serves as written declaration and documents the income of the tenant(s) occupying a WHP rental unit, as verified by the property owner or designee.

1. At or before lease execution, but no later than ten (10) days after a tenant's lease period begins, this completed and executed Lease Addendum must be submitted by the property owner/designee to County Staff at PZB-WHPRentals@pbcgov.org for compliance determination. Property managers are encouraged to submit draft lease addenda (not executed) for preliminary review. Any issues identified in the compliance review are required to be addressed within ten (10) days.
2. Within three (3) days of compliance determination by County Staff, the property owner/designee must provide a copy of this addendum to the tenant at _____
(enter tenant's email)

Development: _____

Unit Number: _____ Number of Bedrooms: _____ WHP Rent: \$ _____

Lease starts: _____ Lease ends: _____

This is an ☐ initial certification or a ☐ recertification.

Household Income is defined as the documentable gross income before taxes received annually by income earners residing in the WHP tenant's household, used to determine the Income Category and subcategory if applicable. At least one income earner must be employed in Palm Beach County. Household Income does not include investment, retirement, or checking/savings account balances, but may include distributions to the WHP tenant from retirement accounts, and periodic determinable allowances such as alimony and child support. Irregular income such as overtime and bonus payments may be considered at the discretion of the WHP rental unit owner or designee.

Identify each income earner in the household that will be occupying this unit. (add lines if needed)

Tenant's Name	Tenant's Annual Income
_____	_____
_____	_____
_____	_____
Total Household Income:	_____

2024 WHP Income Category (please check)

- | | |
|---|------------------------|
| <input type="checkbox"/> Low (60-70% of MFI): | \$62,400 - \$72,800 |
| <input type="checkbox"/> Low (>70-80% of MFI): | >\$72,800 - \$83,200 |
| <input type="checkbox"/> Moderate-1 (>80-90% of MFI): | >\$83,200 - \$93,600 |
| <input type="checkbox"/> Moderate-1 (>90-100% of MFI): | >\$93,600 - \$104,000 |
| <input type="checkbox"/> Moderate-2 (>100-110% of MFI): | >\$104,000 - \$114,400 |
| <input type="checkbox"/> Moderate-2 (>110-120% of MFI): | >\$114,400 - \$124,800 |
| <input type="checkbox"/> Middle (>120-130% of MFI): | >\$124,800 - \$135,200 |
| <input type="checkbox"/> Middle (>120-140% of MFI): | >\$135,200 - \$145,600 |

For any questions, contact County WHP staff at PZB-WHPRentals@pbcgov.org or 561-233-5300.

October 2023 Code Changes

- Clarified for all projects
 - Mandatory and Voluntary Fee Structure
 - Real-time Compliance Reporting
 - Enforcement Parameters
 - Timeframes for Reporting and Responding
 - Minimum Occupancy Requirements
- Eliminated for new projects and opt-ins
 - Annual Reporting
 - Utility Allowance

Fees Assessed to Tenants

- Mandatory fees are fees for items that are required of all tenants, and over which the tenant does not exercise any control over the option or the usage.
 - These include items such as pest control fees, fees for common area amenities, or other fees charged to all tenants.

Mandatory fees must be capped by the maximum WHP rent.

- Voluntary fees are any fees over which the tenant exercises control over the option or the usage.
 - Examples of voluntary fees include fees for optional amenities and services, such as pet fees, optional storage area fees, or fees for services such as internet access, if optional and not mandatory for all residents.

Voluntary fees are not required to be capped by the maximum WHP rent, even if the fee is billed through the property management company or a third party biller.

Timeframe for Reporting

- The required documents to be submitted no later than 10 days after a tenant's lease period begins
 - ☐ New tenants: Lease Addendum and Rent Calculation Worksheet
 - ☐ Renewals-not recertified: Rent Calculation Worksheet
 - ☐ Renewals-recertified (with 60-day notice to tenant): Lease Addendum and Rent Calculation Worksheet
 - ☐ Recertification during the course of the lease (if requested by tenant, and at discretion of property manager): Lease Addendum and Rent Calculation Worksheet
- Documentation is to be submitted to: PZB-WHPRentals@pbcgov.org

Other timeframes

- Within 3 business days, staff will review the submittal for compliance with program requirements and notify the property manager if the unit is compliant or if issues have been identified.
- Property managers have maximum of 10 business days to address any issues identified by staff
- When the unit is deemed compliant property managers have to provide copies of Lease Addendum and/or WHP Rent Calculation Worksheet to tenants.

WHP Rent Calculation Worksheet

This Rent Calculation Worksheet (RCW) documents the rent to be charged for the Workforce Housing Program (WHP) rental unit, to help avoid overcharges and subsequent credits to WHP tenants.

- The property owner/designee provides this RCW to County Staff at P2B-WHPRentals@pbcgov.org for compliance determination at or before the following events (check one):

- ☐ At initial certification at lease execution/new move-ins
Date of lease execution: _____
- ☐ At lease renewal (whether or not the property opts to recertify tenant's income)
Date of renewal execution: _____
- ☐ At any adjustments approved during the lease term
Effective date of adjustment: _____

Property managers are encouraged to submit draft RCW for preliminary review. Any issues identified in the compliance review are required to be addressed within ten (10) days.

- Within three (3) days of compliance determination by County Staff, the property owner/designee must provide a copy of this RCW to the tenant at _____
(enter tenant's email)

Development: _____ Unit Number: _____

Unit type: ☐ Studio; ☐ 1 bedroom; ☐ 2 bedroom; ☐ 3 bedroom; ☐ 4 bedroom

Tenant Name: _____

Lease starts: _____ Lease ends: _____

Total Household Income as certified by property owner or designee: _____

WHP Income Category (at time initial WHP certification or re-certification)

- ☐ LOW (60%-80% of AMI) ☐ MOD1 (>80%-100% of AMI)
☐ MOD2 (>100%-120% of AMI) ☐ MIDDLE (>120%-140% of AMI)

Maximum WHP Rent in effect _____

Link to WHP ranges: https://discover.pbcgov.org/pzb/planning/PDF/Projects/Housing/WHPRentals_Incomes.pdf

WHP Rent calculation:

- (1) Monthly Rent (per Lease): _____/month
- (2) Mandatory fees/charges for: _____/month
_____/month
Total mandatory fees/charges: _____/month
- (3) Total monthly Rent: (1)+(2) _____/month
- (4) Utility allowance _____/month
- (5) WHP Rent: (3)-(4) _____/month

Property owner or designee: _____

Print Name: _____ Date: _____
(Signature & Title)

For any questions, contact County WHP staff at P2B-WHPRentals@pbcgov.org or 561-233-5300

Information for WHP Tenants

You are receiving this document because you are renting a unit that is subject to the Palm Beach County (PBC) Workforce Housing Program (WHP). This document contains important information for tenants of WHP units.

Who can occupy a WHP unit? Rental WHP units must be rented only to income-eligible households, and must be rented at or below the prices in effect at the time of lease execution, as published annually by PBC.

How and when is income eligibility determined? Your household's income is certified as eligible by the property manager, through completion of a separate document, the WHP Lease Addendum. The household income is then used to establish the income category (or subcategory, if applicable) on the Lease Addendum. The income category also identified on this Rent Calculation Worksheet; along with the number of bedrooms in the WHP unit, this sets the limit on the rent to be charged. Household Income includes documentable gross income before taxes received annually by income earners residing in the WHP tenant's household. At least one income earner must be employed in Palm Beach County. Household Income does not include investment, retirement, or checkingsavings account balances; however, at the discretion of the property owner or designee, it may include distributions from retirement accounts, periodic determinable allowances such as alimony and child support, and irregular income such as overtime and bonus payment.

When is the income certified? Income is certified at the time of initial lease execution. In addition, the property owner also has the option to recertify tenants at the time of lease renewal, but must provide 60 days' notice. (Recertification at lease renewal requires a new Lease Addendum and Worksheet; renewals without recertification will require a new Worksheet.) Property owners may also recertify tenants during the course of a lease at the tenant's request, but are not obligated to do so. Note that recertification may result in reassignment to a different income category or subcategory; when WHP units are not available in the new category, property managers are encouraged to work with tenants to avoid displacement.

How is the rent set? The Maximum WHP Rent is set by Palm Beach County for each income category and subcategory, by number of bedrooms. The current rent ranges can be viewed here: https://discover.pbcgov.org/pzb/planning/PDF/Projects/Housing/WHPRentals_Incomes.pdf. The rent ranges are updated every July 1st. The rent to be charged is based on the rent range in effect at the time of lease execution, regardless of the move in date. For renewals, the rent is based on the rent range in effect on the date of execution of the renewal, regardless of the start date of the new lease term.

What is included in the rent charged for a WHP unit? The WHP does not specify the services and amenities that must be provided or available for a WHP rental unit, but does establish how charges can be applied for services and amenities:

- Fees for items that are required of all tenants, and over which the tenant does not exercise any control over the option or the usage, are deemed "mandatory" fees and must be capped by the Maximum WHP Rent. These must be included in the total monthly rent (line 3) and cannot be charged above the Maximum WHP rent. Examples include fees for pest control, common area amenities, or other services charged to all tenants.
- Any fee over which the tenant does exercise control over the option or the usage, is deemed "voluntary" and will not need to be capped by the Maximum WHP Rent, even if the fee is billed through the property management company or a third party biller. Examples of voluntary fees include fees for optional amenities and services, such as pet fees, optional storage area fees, or fees for services such as internet access, if optional and not mandatory for all residents.
- The property management retains the right to offer a service or amenity as either voluntary or mandatory, but must abide by the above with regard to the charge for the service.
- Most properties are required to provide a "utility allowance," reflected on line 4 of the Worksheet. This is a monthly rent reduction to help offset tenant-paid costs of water, sewer, gas and/or electric service provided directly to the unit. The WHP Rent identified on line 5 shall not exceed Maximum WHP Rent in effect minus the applicable utility allowance.
- The WHP rent you pay each month should not exceed Line 5, which is the total of the base rent plus all mandatory charges and fees, minus the utility allowance amount. In addition to this amount, you may pay for any optional services or amenities you have selected, and utilities.

For any questions, contact County WHP staff at P2B-WHPRentals@pbcgov.org or 561-233-5300

Compliance Determination

A unit will be considered compliant if the submittal demonstrates that:

- The Lease Addendum is accurately completed and signed by all parties, reflecting the tenant's correct income category based on the Annual Household Income as defined in the WHP code
- The WHP rent includes all mandatory fees and reflects the Utility Allowance, if applicable
- The WHP rent does not exceed the Maximum WHP rent published by the County, minus any applicable Utility Allowance, for the tenant's income category
- The WHP rent reflects the rent range in effect at the time of lease execution or renewal

Example 1. Compliance Determination

(Utility Allowance is required/ provided)

Mandatory Fees

Trash, pest control
\$30 total

Utility Allowance

Additional charges

Garage – \$100, Pet -\$50
Water/sewer - \$80

Compliance determination:

Max WHP Rent \$2410 - \$50= \$2360
WHP Rent \$2180 <\$2360 -**compliant**

WHP Rent Calculation Worksheet

This Rent Calculation Worksheet (RCW) documents the rent to be charged for the Workforce Housing Program (WHP) rental unit, to help avoid overcharges and subsequent credits to WHP tenants.

- The property owner/designee provides this RCW to County Staff at PZB-WHPRentals@pbcgov.org for compliance determination at or before the following events (check one):
 - ☒ At initial certification at lease execution/new move-ins
Date of lease execution: 8/15/2024
 - ☐ At lease renewal (whether or not the property opts to recertify tenant's income)
Date of renewal execution: _____
 - ☐ At any adjustments approved during the lease term
Effective date of adjustment: _____

Property managers are encouraged to submit draft RCW for preliminary review. Any issues identified in the compliance review are required to be addressed within ten (10) days.
- Within three (3) days of compliance determination by County Staff, the property owner/designee must provide a copy of this RCW to the tenant at _____.
(enter tenant's email)

Development: _____ Unit Number: _____

Unit type: ☐ Studio; ☐ 1 bedroom; ☒ 2 bedroom; ☐ 3 bedroom; ☐ 4 bedroom

Tenant Name: _____

Lease starts: 8/15/2024 Lease ends: 8/14/2025

Total Household Income as certified by property owner or designee: 91,000

WHP Income Category (at time initial WHP certification or re-certification)

<input type="checkbox"/> LOW (60%-80% of AMI)	<input checked="" type="checkbox"/> MOD1 (>80% -100% of AMI)
<input type="checkbox"/> MOD2 (>100% -120% of AMI)	<input type="checkbox"/> MIDDLE (>120% -140% of AMI)

Maximum WHP Rent in effect 2410

Link to WHP ranges: https://discover.pbcgov.org/psb/planning/PDF/Projects/Housing/WHPRents_Incomes.pdf

WHP Rent calculation:

(1) Monthly Rent (per Lease):	<u>2200</u> /month
(2) Mandatory fees/charges for: <u>valet trash</u>	<u>25</u> /month
<u>pest control</u>	<u>5</u> /month
Total mandatory fees/charges:	<u>30</u> /month
(3) Total monthly Rent: (1)+(2)	<u>2230</u> /month
(4) Utility allowance	<u>50</u> /month
(5) WHP Rent: (3)-(4)	<u>2180</u> /month

Property owner or designee: _____
(Signature & Title)

Print Name: _____ Date: _____

For any questions, contact County WHP staff at PZB-WHPRentals@pbcgov.org or 561-233-5300

Example 2. Compliance Determination - Subcategories (Utility Allowance is required/ provided)

Mandatory Fees

Trash, pest control
\$30 total

Utility Allowance

Additional charges

Garage – \$100, Pet – \$50
Water/sewer - \$80

Compliance determination:

Max WHP Rent \$2169 - \$50 = \$2119

WHP Rent \$2180 > \$2119 – **not compliant**

WHP Rent Calculation Worksheet

This Rent Calculation Worksheet (RCW) documents the rent to be charged for the Workforce Housing Program (WHP) rental unit, to help avoid overcharges and subsequent credits to WHP tenants.

1. The property owner/designee provides this RCW to County Staff at PZB-WHPRentals@pbcgov.org for compliance determination at or before the following events (check one):

☒ At initial certification at lease execution/new move-ins
Date of lease execution: 8/15/2024

☐ At lease renewal (whether or not the property opts to recertify tenant's income)
Date of renewal execution: _____

☐ At any adjustments approved during the lease term
Effective date of adjustment: _____

Property managers are encouraged to submit draft RCW for preliminary review. Any issues identified in the compliance review are required to be addressed within ten (10) days.

2. Within three (3) days of compliance determination by County Staff, the property owner/designee must provide a copy of this RCW to the tenant at _____
(enter tenant's email)

Development: _____ Unit Number: _____

Unit type: ☐ Studio; ☐ 1 bedroom; ☐ 2 bedroom; ☐ 3 bedroom; ☐ 4 bedroom

Tenant Name: _____

Lease starts: 8/15/24 Lease ends: 8/14/25

Total Household Income as certified by property owner or designee: 91,000

WHP Income Category (at time initial WHP certification or re-certification)

<input type="checkbox"/> LOW (60%-70% of AMI)	<input type="checkbox"/> MOD1 (>80% -90% of AMI)
<input type="checkbox"/> LOW (>70% -80% of AMI)	<input type="checkbox"/> MOD1 (>90% -100% of AMI)
<input type="checkbox"/> MOD2 (>100%-110% of AMI)	<input type="checkbox"/> MIDDLE (>120% -130% of AMI)
<input type="checkbox"/> MOD2 (>110% -120% of AMI)	<input type="checkbox"/> MIDDLE (>130% -140% of AMI)

Maximum WHP Rent in effect 2169

Link to WHP ranges: https://discover.pbcgov.org/pzb/planning/PDF/Projects/Housing/WHPRentals_Incomes.pdf

WHP Rent calculation:

(1) Monthly Rent (per Lease):	<u>2200</u>	/month
(2) Mandatory fees/charges for:	<u>valet trash</u>	<u>25</u> /month
	<u>pest control</u>	<u>5</u> /month
Total mandatory fees/charges:	<u>30</u>	/month
(3) Total monthly Rent: (1)+(2)	<u>2130</u>	/month
(4) Utility allowance	<u>50</u>	/month
(5) WHP Rent: (3)-(4)	<u>2180</u>	/month

Property owner or designee: _____
(Signature & Title)

Print Name: _____ Date: _____

For any questions, contact County WHP staff at PZB-WHPRentals@pbcgov.org or 561-233-5300

Example 3.Compliance Determination

(No Utility Allowance is required, Utilities are metered/sub-metered)

Mandatory Fees

Trash, pest control
\$30 total

Additional charges

Garage – \$100, Pet -\$50
Water/sewer - \$80 (metered)

Compliance determination:

Max WHP Rent \$2410
WHP Rent \$2230 <\$2410 - **compliant**

WHP Rent Calculation Worksheet

This Rent Calculation Worksheet (RCW) documents the rent to be charged for the Workforce Housing Program (WHP) rental unit, to help avoid overcharges and subsequent credits to WHP tenants.

1. The property owner/designee provides this RCW to County Staff at PZB-WHPRentals@pbcgov.org for compliance determination at or before the following events (check one):

☒ At initial certification at lease execution/new move-ins
Date of lease execution: 8/15/24

☐ At lease renewal (whether or not the property opts to recertify tenant's income)
Date of renewal execution: _____

☐ At any adjustments approved during the lease term
Effective date of adjustment: _____

Property managers are encouraged to submit draft RCW for preliminary review. Any issues identified in the compliance review are required to be addressed within ten (10) days.

2. Within three (3) days of compliance determination by County Staff, the property owner/designee must provide a copy of this RCW to the tenant at _____
(enter tenant's email)

Development: _____ Unit Number: _____

Unit type: ☐ Studio; ☐ 1 bedroom; ☒ 2 bedroom; ☐ 3 bedroom; ☐ 4 bedroom

Tenant Name: _____

Lease starts: 8/15/24 Lease ends: 8/14/25

Total Household Income as certified by property owner or designee: 91,000

WHP Income Category (at time initial WHP certification or re-certification)

☐ LOW (60%-80% of AMI) ☒ MOD1 (>80% -100% of AMI)
☐ MOD2 (>100% -120% of AMI) ☐ MIDDLE (>120% -140% of AMI)

Maximum WHP Rent in effect 2410

Link to WHP ranges: https://discover.pbcgov.org/pzb/planning/PDF/Projects/Housing/WHPRentals_Incomes.pdf

WHP Rent calculation:

(1) Monthly Rent (per Lease):		<u>2200</u> /month
(2) Mandatory fees/charges for:	<u>valet trash</u>	<u>25</u> /month
	<u>pest control</u>	<u>5</u> /month
Total mandatory fees/charges:		<u>30</u> /month
(3) WHP Rent: (1)+(2)		<u>2230</u> /month

Property owner or designee: _____
(Signature & Title)

Print Name: _____ Date: _____

For any questions, contact County WHP staff at PZB-WHPRentals@pbcgov.org or 561-233-5300

Example 4. Compliance Determination

(No Utility Allowance is required, utilities are formula based/flat fee)

Mandatory Fees

Trash, pest control

Water/sewer - \$80 (RUB/ flat fee)

Total mandatory fees - \$110

Additional charges

Garage – \$100, Pet – \$50

Compliance determination:

Max WHP Rent \$2410

WHP Rent \$2310 < \$2410 - **compliant**

WHP Rent Calculation Worksheet

This Rent Calculation Worksheet (RCW) documents the rent to be charged for the Workforce Housing Program (WHP) rental unit, to help avoid overcharges and subsequent credits to WHP tenants.

1. The property owner/designee provides this RCW to County Staff at PZB-WHPRentals@pbcgov.org for compliance determination at or before the following events (check one):

☒ At initial certification at lease execution/new move-ins
Date of lease execution: 8/15/24

☐ At lease renewal (whether or not the property opts to recertify tenant's income)
Date of renewal execution: _____

☐ At any adjustments approved during the lease term
Effective date of adjustment: _____

Property managers are encouraged to submit draft RCW for preliminary review. Any issues identified in the compliance review are required to be addressed within ten (10) days.

2. Within three (3) days of compliance determination by County Staff, the property owner/designee must provide a copy of this RCW to the tenant at _____
(enter tenant's email)

Development: _____ Unit Number: _____

Unit type: ☐ Studio; ☐ 1 bedroom; ☒ 2 bedroom; ☐ 3 bedroom; ☐ 4 bedroom

Tenant Name: _____

Lease starts: 8/15/24 Lease ends: 8/14/25

Total Household Income as certified by property owner or designee: 91,000

WHP Income Category (at time initial WHP certification or re-certification)

☐ LOW (60%-80% of AMI) ☐ MOD1 (>80% -100% of AMI)
☐ MOD2 (>100% -120% of AMI) ☐ MIDDLE (>120% -140% of AMI)

Maximum WHP Rent in effect 2410

Link to WHP ranges: https://discover.pbcgov.org/pzb/planning/PDF/Projects/Housing/WHPRentals_Incomes.pdf

WHP Rent calculation:

(1) Monthly Rent (per-Lease):		<u>2200</u> /month
(2) Mandatory fees/charges for:		
	<u>valet trash</u>	<u>25</u> /month
	<u>pest control</u>	<u>5</u> /month
	<u>water/sewer RUB/ flat fee</u>	<u>80</u> /month
		____ /month
Total mandatory fees/charges:		<u>110</u> /month
(3) WHP Rent: (1)+(2)		<u>2310</u> /month

Property owner or designee: _____
(Signature & Title)

Print Name: _____ Date: _____

For any questions, contact County WHP staff at PZB-WHPRentals@pbcgov.org or 561-233-5300

Compliance Monitoring and Enforcement

- Compliance of each unit will be tracked by the County and used to determine whether the project is addressing its WHP obligations at the individual unit and overall project level.
- Code enforcement action may be initiated if WHP requirements are not met for an individual WHP unit, or if a project's overall compliance falls below 90% of its obligation for more than 60 days.

Tracking Database example 1

A	B	C	D	E	F	G	H	I	J				K	L	M	N		O	P	Q	R
WHP Rental Unit Number	Number of Bedrooms	Leaseholder Name	Lease Start Date	Lease End Date	WHP Certification Date	Total Household Income at WHP certification date	WHP Income Category at certification date	Monthly Rent per lease	Mandatory Fees (indicate each fee below)				Concessions	Total Monthly Rent (I+J.1+J.2+J.4)-(K)	Max WHP Rent per the applicable WHP rent schedule	Applicable Utility allowance	Required Utility allowance	Max WHP Rent in effect reduced by Applicable Utility	WHP rent per worksheet	Worksheet on-file	Overcharge
									J.1	J.2	J.3	J.4									
4173	3	Tenant 1	11/01/2023	10/31/2024	07/22/2021	\$84,000.00	MOD 2	2300						2300	3039	n/a	n/a	3,039	2300	yes	--
4169	3	Tenant 2	05/01/2024	04/30/2025	07/22/2021	\$65,000.00	MOD 1	2450						2450	2533	n/a	n/a	2533	2450	yes	--
4165	3	Tenant 3	7/1/2024	6/30/2025	6/15/2024	\$109,634.00	MOD 2	2550						2550	3039	n/a	n/a	3039	2550	yes	--
														0							--
														0							--
														0							--

WHP Rental Unit Number	Number of Bedrooms	Leaseholder Name	Lease Start Date	Lease End Date	WHP rent per worksheet	Worksheet on-file	Overcharge	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25
4173	3	Tenant 1	11/01/2023	10/31/2024	2300	yes	--	31	31	30	31							
4169	3	Tenant 2	05/01/2024	04/30/2025	2450	yes	--	31	31	30	31	30	31	31	28	31	30	
4165	3	Tenant 3	7/1/2024	6/30/2025	2550	yes	--	31	31	30	31	30	31	31	28	31	30	31
							--											
							--											
Days Occupied								93	93	90	93	60	62	62	56	62	60	31
Days in a month								31	31	30	31	30	31	31	28	31	30	31
Days required								93.0	93.0	90.0	93.0	90.0	93.0	93.0	84.0	93.0	90.0	93.0
Occupancy rate								100%	100%	100%	100%	67%	67%	67%	67%	67%	67%	33%
LOW								0	0	0	0	0	0	0	0	0	0	0
MOD 1								1	1	1	1	1	1	1	1	1	1	0
MOD 2								2	2	2	2	1	1	1	1	1	1	1
MIDDLE								0	0	0	0	0	0	0	0	0	0	0
WHP Units								3	3	3	3	2	2	2	2	2	2	1

Tracking Database example 2

P	Q	R								
WHP rent per worksheet	Worksheet of file	Overcharge								
			Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Ja
0		--								
0		--								
0		--								
Days occupied			1660	1759	1691	1594	1416	1138	1031	
Days in a month			30	31	31	30	31	30	31	
Days required	57	WHP units obligat	1710.0	1767.0	1767.0	1710.0	1767.0	1710.0	1767.0	
Occupancy rate			97%	100%	96%	93%	80%	67%	58%	
LOW	14		17	17	16	16	12	8	6	
MOD 1	14		23	24	24	24	21	18	17	
MOD 2	14		13	14	12	11	10	9	8	
MIDDLE	15		2	2	3	3	3	3	3	
WHP Units	57		55	57	55	53	46	38	33	
Vacant Units			2	0	2	4	11	19	24	

Take-aways

- Importance of submitting information timely
- Low occupancy – non compliance notice
- More than 60 days of Low Occupancy (under 90%) - Code Enforcement
- Suggestions for tracking WHP units
 - Keep WHP files separate
 - Keep eligibility records for tenant tenure
 - Coming soon: access to our database- on-line portal
- Meet with managers as requested, and quarterly group meetings
- WHP website - Information for Property Managers/Owners of WHP Units

