

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 [\(tenant tenant's email\)](mailto:(tenant 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)

(Print Name)

(Date)

(Tenant Signature)

(Print Name)

(Date)

Owner or Designee:

By: (Owner/Designee Signature)

Name: _____

(Print Name)

Title: _____

Date: _____

Lease Addendum - Deciles

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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.

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.

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: 8/15/2024 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)

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/WHPRents_Incomes.pdf

WHP Rent calculation:

(1) Monthly Rent (per Lease):	<u>2200</u> /month
(2) Mandatory fees/charges for:	<u>25</u> /month
	<u>5</u> /month
	<u>30</u> /month
	<u>2230</u> /month
	<u>50</u> /month
	<u>2180</u> /month

Total mandatory fees/charges: 30 /month

(3) Total monthly Rent: (1)+(2) 2230 /month

(4) Utility allowance 50 /month

(5) WHP Rent: (3)-(4) 2180 /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 re certify 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 checked="" 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/WHPRents_Incomes.pdf

WHP Rent calculation:

(1) Monthly Rent (per Lease):	<u>2200</u> /month
(2) Mandatory fees/charges for:	<u>25</u> /month
valet trash	
pest control	
	<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/WHPRents_Incomes.pdf

WHP Rent calculation:

(1) Monthly Rent (per Lease): 2200 /month

(2) Mandatory fees/charges for: valet trash 25 /month

pest control 5 /month

Total mandatory fees/charges: 30 /month

(3) WHP Rent: (1)+(2) 2230 /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**

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 2

P	Q	R									
WHP rent per worksheet	Worksheet o file	Overcharge	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	
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

