

RESIDENT SELECTION CRITERIA
(Available at the Rental Office)
151 and 351 Friedell Street

The purpose of this document is to establish fair, equitable, and easily understood practices for accepting and disqualifying applicants for occupancy in 151 and 351 Friedell Street.

These criteria are in compliance with requirements of the Federal Low-Income Housing Tax Credit Program and the Tax Credit Allocation Committee of the State of California.

POLICY ON NON-DISCRIMINATION

With respect to the treatment of applicants, the Management Agent will not discriminate against any individual or family because of race, color, creed, national or ethnic origin or ancestry, religion, sex, sexual preference, gender identity, age, disability, handicap, military status, source of income, marital status or presence of children in a household, acquired immune deficiency syndrome (AIDS) or AIDS-related conditions (ARC), or any other arbitrary basis. No criteria will be applied or information considered pertaining to attributes of behavior that may be imputed by some to a particular group or category. All criteria shall be applied equitably and all information considered on an applicant shall be related solely to the attributes and behavior of individual members of the household as they may affect residency.

APPLICATION PROCESSING PROCEDURES

A 500 application waiting list will be established by the Property by a lottery process in accordance with the Marketing Plan for the general populations units.

The waiting list will track applicant name and contact information, household size, household income, status of application, regulatory agency preferences, and any other information deemed necessary for the property specified in regulatory agency requirements.

Applicants will be invited for an interview in the order of the waiting list and in accordance to regulatory agency preference (if any). Eligible applicants will be offered an apartment in accordance to the lottery rank order.

If an applicant is eligible for tenancy, but not appropriately sized unit or AMI designation is available, they will be kept on the wait list in their original position.

Agent will respect the bedroom size option chosen by the applicant unless such choice is contrary to the development's occupancy standards. Persons with a disability that require an accessible unit may select a standard unit or an accessible unit, at their discretion.

Annually, letters will be sent to applicants to update their information and confirm they remain interested in a unit at the project. Failure to respond to the Agent's notice to contact the project will result in removal from the waiting list. It is the obligation of the applicant to notify management of any changes to their address, email address, or phone number.

OCCUPANCY GUIDELINES

The following guidelines are set with regard to number of occupants per dwelling unit. These guidelines are set to avoid overcrowding or underutilization of limited affordable housing opportunities. Section 8305 (b) of the Uniform Multifamily Regulations states that the minimum number of persons in household per the chart

below. However, it also states that a Sponsor may assign tenant households to units of sizes other than those indicated as appropriate if the Sponsor reasonably determines that special circumstances warrant such an assignment and the reasons are documented in the tenant's file, and maximum household size does not include children under 6.

Units will be occupied in accordance with the following standards:

No. Bedrooms	Minimum	Maximum
1	1	3
2	2	5
3	4	7
4	6	9
5	8	11

These guidelines may also be waived to:

- Conform to Local, State and Federal law regarding Fair Housing and Equal Opportunity.
- Accommodate a household member with a disabling or medical condition.

A household whose composition no longer meets the above guidelines, may be required to move to the next available unit of the appropriate size.

Every household member regardless of age is to be counted as a person. This includes household members in the military or in school; anyone that will occupy the unit during the upcoming 12 months. In accordance with the Low-Income Housing Tax Credit Program and the Tax Credit Allocation Committee of the State of California, unborn children will be counted for family size in determining annual income.

There are 21 units designed specifically for the mobility, vision and hearing impaired.

Wherever possible, we will offer an accessible unit to an eligible individual whose disability requires the accessibility features of the particular unit; when offering an accessible rental unit to applicants without disabilities, we will require such applicants to agree to move to a non-accessible unit when the accessible unit is needed by a disabled household.

UNIT MIX (Does not include PBV units):

Number of Units	Maximum Tenant Income (Expressed as AMI)	Net Rents*
One Bedroom (35 units)	50% MOHCD	\$1371
One Bedroom (1 units)	30% TCAC	\$973
One Bedroom (1 units)	30% MOHCD	\$771
Two Bedroom (21 unit)	50% MOHCD	\$1523
Two Bedroom (1 units)	30% MOHCD	\$860
Three Bedroom (17 unit)	50% MOHCD	\$1674

Four Bedroom (6 units)	50% MOHCD	\$1769
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*Approximate rental rates based upon current income limits published by the U. S. Dept. of Housing & Urban Development. Rental rates subject to change.

ELIGIBILITY CRITERIA

Preference	Applicant Category
1	Certificate of Preference Holders, which includes direct descendants
2	Displaced Tenant Housing Preference (20% Set Aside)*
3	Neighborhood Resident Housing Preference (40% Set Aside) *
4	Live or Work in San Francisco Preference*
5	All Others

*US Military Veteran receive a priority in the Lottery Preference group.

All applicants must meet the minimum income requirement (to demonstrate rent paying ability) and not to exceed the most restrictive maximum income limits (as published annually by MOHCD, Tax Credit or HUD regulations).

MINIMUM INCOME for this property is set at 2 times the monthly rent. If appealed, the household must demonstrate the ability to pay rent for consideration.

MAXIMUM INCOME limits will be adjusted as published by HUD yearly to reflect changes in the Area Median Income. Applicant households whose annual income exceeds the limits published at the time of move in will not be eligible for occupancy. Gross annual income as defined by HUD includes the gross amount (before deductions for taxes, insurance, etc.) of income, including income from assets and all anticipated income being received by all household members in accordance to the Low-Income Housing Tax Credit Program.

Maximum Annual Gross Income Based on Household Size (2024)							
	1 Person	2 People	3 People	4 People	5 People	6 People	7 People
MOHCD 30% AMI	\$31,450	\$35,950	\$40,450	\$44,950	\$48,550	\$52,150	\$55,750
TCAC 30% AMI	\$41,130	\$47,010	\$52,890	\$58,740	\$63,450	\$68,160	\$72,840
MOHCD 50% AMI	\$52,450	\$59,950	\$67,450	\$74,950	\$80,950	\$86,950	\$92,900

All applicants must supply a government-issued photo I.D and sufficient information to enable the housing provider to request and receive written third-party verification from all income sources including, but not limited to: a) Employment; b) Public Assistance programs; c) Savings and Checking accounts; d) Pensions; e) Disability income; f) All assets including property, stocks, bonds, annuities, retirement accounts, etc.

Households comprised entirely of full-time students must meet special eligibility requirements to live in a Tax Credit unit in accordance to Section 42 or the IRS.

The applicants' landlord references must verify a history of responsible occupancy, behavior, and conduct. Current landlord references will be requested along with a third-party unlawful detainer search. All previous

landlords during the past two years will also be contacted. Landlord references will help to determine whether or not the applicant has a good rent paying history, whether or not there have been any disturbing behavior patterns including repeated lease violations, destruction of property, etc. Any documented behavior which would constitute a material violation of the standard lease to be used at this location may be considered grounds for ineligibility.

A credit reference and background check will be required for all adult household members after the household has been income and asset approved. A poor credit history may be grounds to deem an applicant ineligible for housing. Applicants will have the option to explain mitigating circumstances and/or include supplemental information with their application to explain any issues such as foreclosure, bankruptcy and negative credit.

Any of the following circumstances may be defined as Poor Credit History or grounds for disqualification: (This section must be identical on the Grounds for Disqualification that accompany the rental application)

- Total unmet credit problems in excess of \$2,500 within the last three years.
- An unresolved bankruptcy (within the last three years).
- A total of SEVEN (7) unmet credit problems in excess of \$2500 within the last three years.
- An Unlawful Detainer and/or judgment against an applicant obtained by the current or any previous landlord within the last two years.
- An unmet obligation owed to previous landlord within the last two years.
- The applicant must have made timely payments of the last two years' rental payments.

A check will be made of criminal conviction records for the past five years for all adult Applicants of the household in compliance with Article 49 of the San Francisco Police Code: Fair Chance Ordinance. Background checks will be reviewed after all other requirements have been met. Reports will be obtained from local and/or state records and may also include local Police records. If the Applicant has resided in a state other than California and has a past felony conviction, a report will be required from that state or federal organization. Generally, public records of this sort are only available for the past seven (7) years. Serious felony offenses and/or continued and ongoing criminal activity will be grounds for disqualification if such offenses involve physical violence to persons or property, domestic violence, sexual abuse, the manufacture or sale of narcotics, possession of an illegal weapon, breaking and entering, burglary or drug related criminal offenses. The nature, severity and recency of such offenses and/or ongoing criminal activity will be considered when reviewing the Applicant and only those potentially impacting the health, safety, security or right to peaceful enjoyment of the property of and by other residents, visitors or employees will be considered. Additionally, applicants may be disqualified due to:

- A documented history of violence or abuse (physical or verbal), in which the applicant was determined to be the antagonist.
- A household in which any member is currently engaged in behavior or activity for which the owner has documented proof that may interfere with the health, safety, security, or right to peaceful enjoyment of the property of and by other residents, visitors or employees.

Consideration may be granted to Applicants with past nonviolent criminal records occurring seven or more years in the past with no further criminal record. Applicants will be provided the criminal background record and provided an opportunity to respond and to provide evidence of mitigating factors.

Applicants may be deemed ineligible for the following reasons:

- Failure to present all members of the applicants' household at the scheduled interview(s).
- Failure of any household member to behave in an *orderly, non-violent*, manner during an interview or while on the property.
- Falsification of any information provided on an application.
- Poor Credit History, landlord history and/or criminal background check.
- Household income exceeds the set Income Limits.
- Household income does not meet the Minimum Income required to ensure ability to pay rent.
- Household size does not fit the Occupancy Standard
- Failure to provide requested information and proof of income and assets.

Reasonable Accommodations will be made to meet the needs of disabled applicants.

APPEALS PROCEDURES

If an applicant household is deemed ineligible for occupancy, they will be notified in writing of the determination, and the notification will include the reasons for the determination. All applicants who are determined to be ineligible will also be notified of their right to appeal the determination. The written appeal must be received within 5 calendar days from the date that the determination letter was emailed and include additional information. Criminal appeals allow 14 (fourteen) calendar days. If the applicant(s) does not exercise their appeal right in writing and within the required period, the applicant(s) will be ineligible for housing and their application removed from the processing list as well as from the waiting list.

Applicants who appeal the initial decision of ineligibility will meet with the Property Representative. The applicant may bring to this meeting any documentation, evidence, or additional information. The Property Representative will also confer with staff and review the applicant's file in its entirety. If the appeal fails, a Regional Manager who had no involvement in making the original decision of ineligibility will review. The Owner's Representative will make a decision based on the merits of all information reviewed. A written decision will be placed in the applicants file. All decisions on appeals will be made within 15 calendar days from the appeals meeting date.

RESIDENT ACCEPTANCE

Applicants will be offered at least one apartment based upon lottery rank order. They will be offered the first appropriately sized unit for the household's income (AMI) listed on their signed Unit Selection form. All offers of units will be made in writing.

If an applicant has been unable to accept a unit due to a disability or mitigating circumstances (i.e. medical reasons), the applicant shall retain his/her position on the waiting list and will be referred to JSCo's ["Reasonable Accommodation Policy – Notice to All Applicants and Residents"](#).

Detailed records of all units offered and refused will be kept by the Management Agent.

GRIEVANCE POLICY

If an Applicant or a Resident feels any representative of management has acted in a discriminatory manner with respect to lease requirements, disability status, accommodation request, application processing, management policies, etc., which has adversely affected the rights of the complainant, the first step should

always be informal discussion of the incident between the complainant and management. Day-to-day contact and honest communication between the manager and the residents or applicants are the most successful way to avoid misunderstandings and develop mutual respect. If this fails to resolve the grievance, the following steps should be taken:

1. Informal Grievance Review

The goal of the informal review is to settle the problem without the need for a formal review. If the resident or applicant has a complaint and requests a review, they will have an informal review with the Property Manager or Regional Manager of The John Stewart Company.

- The resident or applicant must personally present their grievance, either orally or in writing, to The John Stewart Company management office at 1388 Sutter Street, San Francisco, CA. 94109, so that management may discuss the grievance with them informally. While they can present their grievance orally, it is better to state the grievance in writing. The grievance may be simply stated, but must specify both the specific ground(s) for the grievance and the action or relief sought.
- The resident or applicant must present their grievance within a reasonable time, not to exceed ten (10) working days following the incident or action upon which the grievance or dispute is based.
- Once requested, an informal review will be held between the resident or applicant and management within five (5) working days following management's receipt of the request.
- Management will prepare a written, dated, and signed summary of the discussion and its response to the grievance within a reasonable time, not to exceed fourteen (14) working days. Management will mail or deliver one copy to the resident or applicant and keep one in its file. Management's answer shall specify 1) the name of the review participants, 2) the date of the review, 3) the nature of the grievance, 4) Management's decision on the grievance (and the specific reasons for Management's decision), 5) the resident or applicant's right to request a formal review, and 6) the procedure to request such a formal review (if the resident or applicant is not satisfied with the Management's decision).

2. Formal Grievance Review

If the resident or applicant is dissatisfied with management's decision after the informal review, they can request a formal review. The formal review will be heard by a Vice President/504 Coordinator or Senior Vice President of The John Stewart Company.

- If the resident or applicant desires a formal review, they may submit a written request to formalreview.sf@jsco.net within five (5) working days after receiving management's written summary of the informal review. If the resident or applicant does not have access to e-mail, then the information may be delivered to the property or the John Stewart Company Regional Office at:

The John Stewart Company
1388 Sutter St Fl 11
San Francisco, CA 94109
Attention: Regional Vice President

- As with the informal review, the resident or applicant must state the nature of their complaint or grievance, the reasons why they disagree with Management's decision resulting from the informal review, and the action or relief they seek.
- The assigned John Stewart Company officer will review the information provided by the resident or applicant and the management staff and make a written determination with ten (10) working days, which shall be final.
- At any time, the resident or applicant has the right to file a complaint with HUD's Office of Fair Housing and Equal Opportunity.

San Francisco Regional Office of FHEO
U.S. Department of Housing and Urban Development
One Sansome Street, Suite 1200
San Francisco, California 94104
(800) 347-3739, TTY (415) 436-6594

Project Based units at 151 and 351 Friedell will not apply to lottery units for the DAHLIA applicants.