



**Roaring Fork School District Rental Properties**  
*Policies and Guidelines*

*Spring 2017*

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## **Objective & Overview**

In November of 2015, Roaring Fork Schools passed a voter approved \$122 million bond for capital construction, improvements and upgrades. \$15 million (\$5 million per community) was allocated to purchase rental housing units in an effort to create a staff housing program with the goal to assist in recruiting and retaining staff. These rental units, limited to five years in term, will provide employees a bridge to permanent housing as the affordable nature will allow staff to save money for future home purchases. It is also a goal that ownership transition is a phase of a more comprehensive housing strategy that will be implemented in the future as rental income becomes available.

The Housing Guidelines Steering Committee started working in May 2016 to examine and discuss the components necessary to run the district staff housing program. After a couple of meetings, it became clear that bigger questions and issues were emerging that needed to be addressed; mainly equity, process, and rent amounts.

Between December 2016 and March 2017, the Housing Guidelines Steering Committee reviewed best practices and lessons learned from other affordable housing models. While affordable teacher/staff housing is becoming more common across America, the review revealed an absence of models that deal with the complexities of equity. In working toward a shared understanding of the current housing crisis, individual Committee members balanced their loyalties to constituent groups against the needs and interests of the District as a whole and of the broader Roaring Fork Valley community. With every decision, the committee strived to prioritize equity as they crafted recommendations that would result in housing opportunities for current and future district staff, but also contribute positively to the District and the Valley.

The Steering Committee's proposed housing guidelines were developed to communicate to the employees of the District the process that will be used to allocate housing during the inaugural academic year of the program (2017-18) and beyond. It is also understood that the guidelines will be updated for subsequent years as both the impacts of the program are evaluated and the needs of the District evolve.

## **General Conditions**

The Roaring Fork School District will own a variety of properties for the sole purpose of attracting and retaining high-quality staff through the availability of rental properties. These properties will be available for rent to district employees according to the guidelines provided herein, provided the employee(s) meet the eligibility requirements and abide by the restrictions established by this policy.

The terms of these guidelines are not exhaustive. The District may lease the properties for such rental amounts and upon such terms and conditions as may be deemed necessary or advisable by the Board of Education. This policy is intended only to establish a recommended procedure for leasing the properties

and shall not create a property interest or other legally enforceable right in any individual to lease or occupy the properties. Staff is reminded that affordable housing is a privilege granted through the generosity of Roaring Fork Valley communities through a bond election. The District expects staff to comply with all regulations in the spirit in which they were intended.

Roaring Fork School District (the District) will use available employee housing to best serve the District and strive to balance the need for recruitment and retention.

- Employees of the District will be notified of available units for rent as soon as possible.
- The District's property management company will process all applications based on District needs.
- Once a rental unit has been designated as such, the Superintendent or their designee has the authority to offer a lease or lease renewal consistent with the determination of district need.
- All rental leases will be from July 1 to June 30, renewable every year for up to five years. A lease may be for less than one year if the lease starts after July 1 but will not extend past June 30. Leases will be terminated 30 days after employment is terminated. A written amendment to the current lease will suffice to extend a lease. Rates may be changed July 1 of any year with 30 days' notice.
- Rental rates will be set by the Board of Education in consultation with the Superintendent or their designee and will not change based on occupants. These rates may be reviewed by the BOE (Board of Education) from time to time.

## **Eligibility**

Any person who is employed full-time by the school district shall be eligible to enter the housing lottery for available properties. "Full-time" district employment is defined as 30 hours or more per week. "Part-time" district employment is defined as 20-30 hours per week. In the event of insufficient interest by full-time employees (if units remain available), part-time staff may be considered. An individual who owns real estate must submit to the district a letter of intent to sell the property within nine months. In determining eligibility, each dependent child of a qualified applicant counts equal to a qualified adult.

## **Definitions**

*Applicant* - person or group of persons applying for a rental unit.

*Average household income* - the total amount of all wage earners' gross income living in a unit divided by the total number of wage earners. Wage earners who are less than full-time will be excluded from the calculation unless their part-time income exceeds the full time wage earner's gross income.

*Gross income* - The total income of a person including gross wages, maintenance and child support, income derived from a business, trust, employment, or income-producing property, before deductions for expenses, depreciation, taxes, and similar allowances.

Gross wages of qualified certified employees for purposes of this calculation shall be based on the current year contracted salary, excluding pay for extra duties and assignments (certified salary schedule amount only).

Gross wages of qualified non-certified employees for the purposes of this calculation shall be based on their hourly wage multiplied by the number of hours per day and days per year in their normal work schedule (excluding overtime).

*Full time employee* - district employment defined as 30 hours or more per week.

*Part time employee* - district employment defined as 20-30 hours per week.

*Qualified employee* - an individual who works for the school district and meets the eligibility requirements.

*Qualified dependent* - A qualified dependent is a dependent who lives with the qualified adult a minimum of 100 days per year as demonstrated by court documents or a notarized custody affidavit. If at the time of the application the qualified adult is expecting the birth of a child, the unborn child can be counted as a dependent upon receipt of a letter from a doctor stating the due date.

*Non qualified adult* - an individual who does not meet the eligibility requirements.

## **Qualification Guidelines**

### **Income verification:**

Employees - income will be determined based on district salary as defined under gross income and previous year tax returns, including federal, state income taxes and W-2 or 1099 forms.

Non-employees - Previous year tax returns and/or 2 months most recent pay stubs will be used to verify income of adults in the household who are not employed by the District.

Additional Income - All tax returns will be reviewed for additional sources of income beyond income earned in a job (e.g. businesses, partnerships, alimony, etc) and this income will be calculated as part of gross income.

### **Certified and non-certified employees:**

Non-certified employees - Eligible for up to 20% of the total units. This percentage may be less if the total number of non-certified employee applications received for housing is less than 40% of the total applications received.

Certified employees - Eligible for a minimum of 80% of the total units. This percentage may be more if the total number of non-certified employee applications received for housing is less than 40% of the total applications received.

**Occupancy guidelines:** No more than two people (aged 5 and up) will be permitted per bedroom at the time of lease signing.

**Unit choice:** All applicants must select both the community and the apartments size they desire. They may only chose one and may not switch until the next application period.

**Verification of Qualified Household Size:** The total number of persons in a household, including qualified adults and dependents, are counted in determining the unit size for which applicants may qualify. The priority is a minimum of one qualified person per bedroom.

For example:

- Two qualified employees would be eligible for a 1 or 2 bedroom apartment.
- Three qualified employees would be eligible for a 2 or 3 bedroom apartment.
- A qualified employee married to a non-qualified adult would be eligible for a 1 bedroom apartment.
- Two qualified employees with two qualified children would be eligible for a 2 or 3 bedroom apartment.
- A qualified employee with 2 children over age five would be eligible for a 2 or 3 bedroom apartment. However, if one or both children were under the age of 5, they would be eligible for a 1 bedroom apartment.

## Qualification Process

Aiming to be as equitable as possible, while balancing the needs of the District and its employees, housing will be allocated via a points-based qualification process, as follows:

### 1. Applicants will be given points based on the criteria below:

Criteria	Points
Qualified employees sharing a unit with an average (of contributing wage earners') household income of less than certified staff median income/year. This includes spouses/partners and roommates.	2 pts per qualified employee + 1 pt per qualified dependent
A single qualified employee with children where 80% of household income is less than the certified staff median income/year.	2 pts + 1 pt per qualified dependent
Qualified employees with non-qualified spouses/partners with children and an average (of contributing wage earners') household income of less than certified staff median income/year	1 pt + 1 pt per qualified employee + 1 pt per qualified dependent
Qualified employees with non-qualified spouses/partners with an average (of contributing wage earners') household income of less than certified staff median income/year	1 pt
Individual employees seeking a one-bedroom apartment	1 pt

making less than the certified staff median income/year.	
Any qualified employee not described in a section above	0 pts
<b>Additional points will be awarded for the following:</b>	
Those applying for housing in the community in which they work	1 pt per qualified employee

## 2. Processing of Applications

For each community, applications will be grouped by unit size, then processed by total points earned. Within each unit size group, a tie in total points earned will be determined by a random selection.

## Rental Units

All units - those currently available and those still in development - are included in the launch.

- **Willits (Basalt)** – 17 units. Ready for move-in summer 2017. (6 1-BR, 7 2-BR, 4 3-BR)
- **Carbondale** – 16-20 units. Anticipated availability late 2018. (mix of configurations TBD)
- **Ironbridge (Glenwood Springs)** – 6 units. Ready for move-in summer 2017. (4 2-BR, 2 3-BR)
- **Remaining Glenwood Springs Units** – 10-12 units. Anticipated availability late 2018. (mix of configurations TBD)

In the program’s first year, roughly 12% (2 units per community) of rooms will be reserved for new staff. This percent represents roughly two units per community and is intended to serve as a guideline and target in subsequent years.

## Rent Amounts

In the interest of equity, a tiered rent approach is used. Current rent amounts are available [here](#). Rent amounts are applicable for one year and subject to change with each lease renewal.

## Duration

Leases will be renewed annually with a term limit of 5 years.

## Changes & Updates to Guidelines

The District will review these guidelines annually and may make appropriate changes. Renters will be subject to changes in guidelines at the time of lease renewal.



## **Interpretation of Guidelines**

Certain aspects of income and eligibility criteria established in the guidelines may be subject to interpretation. In these cases, the superintendent or his/her designee shall make the final determination as to interpretation.

## **Lease Considerations**

These items will be subject to Homeowner Association rules and regulations for individual properties.

1. All leases shall be issued for a one year term with the option to renew annually for a total of 5 years. 5-year term, subject to annual review of gross income.
2. Lease shall continue only so long as the individual remains employed by the district and maintains satisfactory job performance as determined by the Superintendent or their designee. In the event that a person is terminated during the period of time that the lease is in effect, they will receive notice of when they need to vacate the unit but it shall not be less than 30 days.
3. Lessee may allow relatives and other district employees to occupy the premises as roommate /sub-lessee only upon prior approval by the Superintendent or their designee.
4. Short term/vacation rentals of units or bedrooms will not be allowed (includes AirBNB, VRBO, HomeAway or like services).
5. Individuals not employed by the District must be approved to occupy the premises by the Superintendent or their designee.
6. Renter shall be responsible for upkeep and general maintenance of the property, and shall pay the established rental fee and be subject to other obligations as provided in a lease to be executed between the parties. The lease term shall not extend beyond one year.
7. The District shall be responsible for repairs beyond general maintenance, provided that such repairs are not required because of an intentional or negligent act or omission by one of the occupants or their licensees, invitees or guests.
8. In case of the vacancy of a bedroom in a two or three-bedroom unit, the remaining tenant(s) may attempt to fill the vacancy with a qualified employee within a forty-five day vacancy limit, or the vacancy shall be advertised and filled according to the District's guidelines. The District will consult with any remaining tenant(s) before selecting a new tenant to try to maximize the compatibility between the remaining and replacement tenants. Utilities will be billed to the tenants where appropriate.
9. All occupants must follow the rules and guidelines of the homeowner's association, where applicable, or district rules and regulations with regards to the location of the units. Local HOA rules/regs will supercede any lease considerations included in this document.
10. Smoking shall not be allowed in any district units.
11. Small pets (under 25 lbs) will be considered where allowed and ultimately approved by the District. An additional pet deposit will be required. Previous renting references will be requested and checked.
12. Basic homeowner's dues are paid for by the district as part of the rental fee. Any additional amenities such as golf, pool privileges, etc. that may not be included in the basic dues are the

responsibility of the tenants.

13. Units are allotted to the individuals who sign the lease. Guests are limited to stay no more than 28 days in a 12-month period.
14. Leases will be subject to other lease terms that may not be stated in this document.