City of Piedmont
COUNCIL AGENDA REPORT

DATE: July 20, 2026

TO: Mayor and Council

FROM: Rosanna Bayon Moore, City Administrator

SUBJECT: Receipt of the 2025 Annual Progress Report to the California Department of Housing and Community Development Regarding the Implementation of the 6th Cycle (2023-2031) Housing Element

RECOMMENDATION

Receive the attached 2025 Annual Progress Report (APR) for the implementation of the Piedmont General Plan 6th Cycle (2023-2031) Housing Element programs.

EXECUTIVE SUMMARY

The 2025 Housing Element Annual Progress Report (APR) tracks the implementation of Piedmont's 6th Cycle (2023–2031) Housing Element. In compliance with Government Code Section 65400, the APR details the City's ongoing progress toward meeting its State-mandated Regional Housing Needs Allocation (RHNA) target of 587 housing units by 2031, which are distributed across very low, low, moderate, and above-moderate income affordability tiers.

In 2025, 14 new homes completed construction, all of which were accessory dwelling units (ADUs), representing an increase from nine completed units in 2024. In 2025, the City issued 15 building permits (consisting of 14 ADUs and one SB 9 unit) and approved 16 planning entitlements for new homes, denying only one ministerial SB 9 development. Using a local rental survey and regional planning methodologies to determine ADU affordability, staff categorized the 15 permitted units as four very low-income, five low-income, three moderate-income, and three above-moderate-income units.

In addition to direct unit construction, Piedmont made significant progress implementing the 77 programs outlined in its Housing Element. Key achievements in 2025 included relaxing zoning restrictions for mixed-use development, and adopting the Moraga Canyon Specific Plan. Building on these planning initiatives, the City posted a Request for Qualifications (RFQ) in May 2026 to begin a process to select a development team for Moraga Canyon.

## BACKGROUND

State law requires all cities and counties in California to prepare a "Housing Element," which establishes a long-range plan to meet a community's fair share of regional housing needs. The Housing Element provides an analysis of development constraints and the immediate and long-term housing needs in Piedmont, identifying land and financial resources to meet the City's fair share of housing growth, establishing policies that address those needs based on the collective vision and values of the Piedmont community, and including programs that would help implement those policies. Information about Housing Element law is available on the HCD website at https://www.hcd.ca.gov/planning-and-community-development/housing-elements.

Pursuant to Government Code Section 65400, local governments are required to submit electronically, in a pre-established spreadsheet format, a Housing Element Annual Progress Report (APR) to the California Department of Housing and Community Development (HCD). Piedmont staff filed the 2025 APR with HCD on April 1, 2026, and staff is presenting the APR to Council, in accordance with State law. The purpose of the APR is to inform the State, decision-makers and the public on the status and progress of implementing the City's Housing Element including tracking overall housing unit production and affordability, and to provide updates on the implementation of policies and programs. The reporting requirements are established by California law and have expanded significantly in scope and detail in recent years.

The State-mandated targets for the production of new units by the end of 2031 in Piedmont are 587 housing units in the following affordability categories: 238 above moderate income; 92 moderate income; 94 low income; and 163 very low income.

## ANNUAL PROGRESS REPORT

Pursuant to Government Code Section 65400, the Annual Progress Report must be prepared using an Excel spreadsheet form prescribed by HCD. Piedmont's Annual Progress Report for 2025 is posted to the City's website and linked as Attachment B. It details the following approvals:

- ***Completed Housing Units***: 14 new homes completed construction (compared to 9 in 2024)
- ***Building Permits***: Building staff issued 15 building permits, consisting of 14 to construct new accessory dwelling units (ADUs), plus one building permit for a SB 9 housing unit (compared to a total of 14 ADUs and two SB 9 housing units in 2024)
- ***Planning Approvals***: Planning staff approved 16 permits for new homes in 2025, consisting of 14 permits for ADUs, plus one single-family home and one SB 9 housing unit (compared to 18 ADUs, one single-family home, and two SB 9 duplex units in 2024)

In addition, in 2025 the City made significant progress implementing 77 Housing Element programs, including adopting zoning amendments and completion of the Moraga Canyon Specific Plan. A request for qualifications seeking a developer or development team to construct housing and other improvements in Moraga Canyon was posted to the City website in May 2026. The status of each of the housing programs is described in Table D of the APR.

In 2025, four of the building permits that were issued were for small ADUs and Junior ADUs. Based on a survey of rental units in the Piedmont-Oakland housing market, these units are listed in the APR as affordable to households earning very low incomes (VL), meaning households earning less than 50 percent of the area median income for Alameda County (income of approximately $71,950 a year maximum for a household of three people). The RHNA allocation for very low-income households is 21 units annually. (This annual goal is calculated by dividing the 6th Cycle RHNA goal of 163 very low-income units by the 8 years of the planning period.)

Five building permits issued in Piedmont in 2025 were for ADUs that would likely have rents affordable to residents earning low-income wages between 50 percent to less than 80 percent of the area median income for Alameda County. City staff characterize these units as low income. In 2025, this income was approximately $112,550 maximum a year for a three-person household.

Three new ADUs that were issued building permits in 2025 are characterized as moderate-income housing (M) based on the rental survey. Moderate incomes are 80 percent to 120 percent of the area median income for Alameda County. In 2025, this income was a maximum of approximately $172,600 a year for a household of three people (and more for larger households).

The remaining two ADUs and one SB 9 housing unit that were issued building permits in 2025 are estimated to be affordable to above-moderate-income (AM) households earning greater than 120 percent of the area median income.

In addition to the building permits issued, the City issued final approval of construction for 14 housing units in 2025, all of which are ADUs. For comparison, the City issued final approval for construction of nine new housing units in 2024, 12 housing units in 2023, 14 housing units in 2022, and 16 housing units in 2021.

Lastly, in 2025, the Planning Division approved 16 planning entitlements for new housing units in 2025, consisting of 14 permits for ADUs, plus one single-family home, and one SB 9 housing unit. For comparison, the City approved planning entitlements for 21 new units in 2024, 26 entitlements in 2023, 28 entitlements in 2022, 33 entitlements in 2021, and 25 entitlements in 2020. In 2025, the only planning entitlement to be denied was one SB 9 ministerial development (Howard Avenue). The projects receiving planning approvals in 2025 are expected to receive building permits in 2026.

***Rental Survey Methodology***

City of Piedmont staff used both the Association of Bay Area Governments / Metropolitan Transportation Commission (ABAG / MTC) methodology dated January 2026 and a rental survey (Attachment A) to determine the potential affordability of the ADUs that obtained permit approval in Piedmont in 2025. In some cases, the potential rent that could be obtained based on the floor area and number of bedrooms of each ADU does not result in the exact distribution recommended in the ABAG / MTC memo. For example, there are fewer ADUs affordable to very low-income households resulting in a share less than the 30 percent maximum for the 2025 APR. This approach is less than the maximum percentage allowed in the ABAG / MTC recommended methodology but is believed to be a more accurate representation of market conditions.

***Housing Element Programs***

In 2025, the City made significant progress implementing the 77 housing programs outlined in the Housing Element. Table D of Attachment B provides each of the Housing Element housing programs and the steps that the City has taken to implement the program. As shown in Table D, Piedmont decision-makers and staff are implementing new programs to increase production beyond the construction activity seen in prior years. New programs include increasing the allowed residential density along portions of Grand Avenue and Highland Avenue, increasing permitted building heights along Grand Avenue, planning for development in Moraga Canyon, and streamlining CEQA review. In 2025, the City of Piedmont relaxed zoning restrictions for mixed-use development and adopted the Moraga Canyon Specific Plan. A request for qualifications seeking a developer or development team to construct housing and other improvements in Moraga Canyon was posted to the City website in May 2026.

***Senate Bill 423***

Senate Bill 423 (SB 423) and Government Code section 65913.4 updates SB 35 (originally adopted in 2017) and provides a streamlined and ministerial review path for projects in jurisdictions that are not meeting their RHNA at both lower income and market-rate income levels. *Ministerial* projects do not require review and approval through a public hearing, review under the California Environmental Quality Act (CEQA), or neighborhood notification. Ministerial projects are subject to local objective design standards (ODS).

The California Department of Housing and Community Development (HCD) determines the eligibility levels for the Streamlined Ministerial Approval Process (SMAP) based on the Housing Element APRs filed by jurisdictions, statewide. The most recent SMAP determination (Attachment C) was released on July 1, 2026.

Currently, Piedmont is one of 178 jurisdictions in the State of California subject to the SB 423 SMAP streamlining for proposed developments with at least 50 percent of the units affordable to people earning less than 80 percent of the area median income for Alameda County. A larger number of California jurisdictions are subject to the lowest eligibility threshold. According to HCD, 329 jurisdictions are now subject to SMAP for projects with only 10% affordability or more. More information about the SMAP determinations and overall progress addressing the State's housing crisis is included as Attachment D. Piedmont's progress will be assessed by HCD again in June 2027 when reviewing the APR for 2026 and preceding years.

CONCLUSION

The 2025 Annual Progress Report shows that the City of Piedmont is making good faith efforts to implement the programs in the 6th Cycle Housing Element and to meet the State-mandated RHNA, and it demonstrates the on-going work underway by Piedmont decision-makers and staff to enable housing production in all income categories in accordance with State law.

By: Pierce Macdonald, Senior Planner

ATTACHMENTS

| | | |
|---|---|---|
| Attachment A | Pages 6 – 17 | Rental Survey |
| Attachment B | Linked | 2025 Housing Element Annual Progress Report |
| Attachment C | Page 18 | SMAP Determination, dated July 1, 2026 |
| Attachment D | Pages 19 – 21 | HCD SMAP and APR Briefing and Announcement |

**ATTACHMENT A – 2025 ADU Affordability and Rental Survey**

In January 2026, the Association of Bay Area Governments / Metropolitan Transportation Commission (ABAG / MTC) published a technical assistance memo, titled "ADU Affordability Survey Findings and Recommendations." In partnership with Bay Area jurisdictions, ABAG has been administering an affordability survey to learn more about the rents of newly built accessory dwelling units (ADUs) in the Bay Area. In 2024 and 2025, participating jurisdictions distributed the survey as part of the permitting process. This data is complimented by similar studies in Oakland and San José.

The technical assistance memo states that, based on the results of the surveys and discussions between ABAG / MTC and California Department of Housing and Community Development (HCD), HCD is comfortable with the City of Piedmont and other ABAG jurisdictions using the following assumptions about the affordability of ADUs in their Annual Progress Reports (APRs) for two more years (APR 2025 and 2026):

- 30% maximum very low income
- 30% maximum low income
- 30% maximum moderate income
- 10% maximum above moderate income

City of Piedmont staff use both the ABAG / MTC methodology and a rental survey to determine the potential affordability of the ADUs that obtained planning and building permit approval in Piedmont in 2025. In some cases, the potential rent that could be obtained based on the floor area and number of bedrooms of each ADU does not result in the exact distribution recommended in the ABAG / MTC memo. For example, there are fewer ADUs affordable to very low-income households resulting in a share less than the 30 percent maximum for the 2025 annual progress report. This approach is conservative because in each case the resulting share is less than the maximum percentage in the ABAG / MTC recommended methodology.

**2025 Rental Market**

The City of Piedmont surveyed the average rent and unit size for Piedmont and the surrounding Oakland area. Real estate websites, providing information and services for people seeking rental housing in a publicly accessible format, were used to find average rental rates and other characteristics of local rental housing in 2025. Rental information for Oakland is readily available. Oakland was found to be a larger sample and more reflective of trends in the local rental market.

Average rents in Piedmont in 2025 total $2,473 per month, the same as that reported in 2024 (a decrease compared to $2,609 in 2023 and $2,725 in 2022 (RentCafe.com)). This rent is less than that reported for the surrounding City of Oakland $2,565 per month on average for a 769-square-foot unit (down from $2,581 per month in 2024 for a 771-square-foot unit, and a decrease from $2,680 in 2023 and $2,850 in 2022 for an average 780-square-foot unit). Average rental unit size in Piedmont in 2025 decreased to 750 square feet down from approximately 770 square feet in 2024. According to RentCafe, in Oakland, 79% of units are rented at a rate greater than $2,000.

The age and small number of Piedmont rental units and the lack of amenities, such as gyms, parking garages, or roof-top gardens, present in many large rental housing developments, could suggest why Piedmont apartments and ADUs rent for slightly less than Oakland as a percentage of overall units (i.e. fewer luxury apartments in Piedmont).

***RentCafe.com*** reports the average rent in Piedmont in 2025 as $2,473 per month. Average unit size is approximately 750 s.f. As stated above, the average rent reported for Oakland was slightly more at $2,565 per month for a 769-square-foot apartment.

This survey incorporates data from ***Zumper.com*** and ***Rentometer.com***. Reliable data for Piedmont was not available from all online sources for 2025 because of the small sample of apartments and the large number of houses for rent (rather than apartments). For example, Zumper.com estimated the average rent of a 1-bedroom apartment in Piedmont at $2,040, a decrease from $2,795 in 2023, based on a sample of one apartment (10% of average of 10 listing per month).

- ***Zumper.com*** reports that the average rent in Oakland in 2025 for a one-bedroom apartment is $1,950 per month, a decrease from $2,046 in 2024 and $2,050 per month in 2023. The sample size is approximately 1,000 apartments surveyed. The average rent for a studio apartment was $1,544 (down from $1,695 per month in 2024). The average rent for a two-bedroom apartment was $2,650, down from $2,725 in 2024.

- ***Rentometer.com*** reports that the average rent for a one-bedroom unit in Piedmont in 2025 (based on a survey of units in both Piedmont and Oakland) is $2,255 per month up from $2,004 in 2024.

  The average rent in Oakland in 2025, based on a survey of 999 one-bedroom units, is $2,149, down from $2,240 in 2024 and $2,381 in 2023. The average rent of a studio apartment in Oakland was $1,901 down from $1,991 in 2024 and up from $1,883 in 2023. The average rent of a two-bedroom apartment in Oakland was $2,939, up from $2,936 in 2024 and down from $3,062 in 2023.

  The average rent of a studio apartment in Piedmont was $1,609, and a 2-bedroom, $3,828. The average rent for a one-bedroom unit was $2,255.

- ***ApartmentList.com was used to prepare the 2024 rental survey. In 2025, ApartmentList.com changed format and no longer provides rental market data.***

This City of Piedmont prepared rental survey shows the cost per square foot based on the average rents provided by RentCafe.com for the City of Oakland market and assigns a 49.3% premium to two-bedroom apartments based on the percentage increase of rents provided by Zumper and Rentometer.

**2025 Piedmont Average Rents Per Square Footage**

| 2025 Average Rent RentCafe | Average Apartment Size | Rent $ Per Square Footage | Rent VL | Rent L | Rent M | Rent AM |
|---|---|---|---|---|---|---|
| $2,473 | 750 | 3.30 | See below. | See below. | See below. | See below. |
| | | | | | | |

**2025 Oakland Average Rents Per Square Footage**

| 2025 Average Rent RentCafe | Average Apartment Size | Rent $ Per Square Footage* | Rent (sf.) VL | Rent (sf) L | Rent (sf.) M | Rent (sf., 1-bedroom + s.f., 2-beds) AM |
|---|---|---|---|---|---|---|
| $2,565 | 769 | 3.34 | | | | |
| | | | | | | |

**A. Zumper Bedroom Count Premium**

| 2025 Average Rent Zumper | 1-Bedroom | 2-Bedroom (+$745 39% premium) |
|---|---|---|
| $1,905 | $1,905 | $2,650 |

**B. Rentometer Oakland Bedroom Count Premium**

| 2025 Average Rent Rentometer Oakland | 1-Bedroom | 2-Bedroom (+$790 36.8% premium) |
|---|---|---|
| $2,149 | $2,149 | $2,939 |

**C. Rentometer Piedmont Bedroom Count Premium**

| 2025 Average Rent Rentometer Piedmont | 1-Bedroom | 2-Bedroom (+$1,573 69.8% premium) |
|---|---|---|
| $2,255 | $2,255 | $3,828 |

**D. Average Rents A to C - Average Premium for 2-Bedroom Apartment**

| Average Rent | 1-Bedroom | 2-Bedroom | Average Premium 2-Bedroom Unit |
|---|---|---|---|
| $2,103 | $2,103 | $3,139 | 49.3% |

## Housing Affordability by Incomes

According to California HCD, the maximum allowable rents in 2025 for low-income (L) category units in Alameda County (less than 80% AMI) are $2,238 per month (studio); $2,398 per month (one-bedroom); and $2,878 (two bedrooms).

The maximum allowable rents for very low-income (VL) category units of one bedroom or studio in Alameda County (less than 50% AMI) are between $1,398 (studio) and $1,598 (one-bedroom unit). The rent for two bedrooms is $1,798 (two bedroom).

The maximum allowable rents for moderate-income (M) category units are $3,356 (studio); $3,835 (one bedroom); and $4,315 (two bedrooms).

The maximum allowable rents for extremely low-income households (EL) (30% AMI or less) are $840 (studio or SRO); $960 (one bedroom); and $1,080 (size not viable for two bedrooms).

**Methodology and Premium for Two-Bedroom Apartments**

The average rents for a one-bedroom apartment surveyed by Zumper and Rentometer (including both Piedmont and Oakland), are less than the average rent surveyed by RentCafe at $2,565for an average 769-square-foot apartment in Oakland. The rent per square foot was calculated by dividing the average unit size by the average rental rate.

This survey uses the higher number, provided for the Oakland rental market, by RentCafe for analysis of probable rents in Piedmont. This survey adjusts the rents for a two-bedroom or more apartment according to the premium for two-bedroom apartments surveyed by Zumper and Rentometer at approximately 49.3% more than a one-bedroom apartment.

Therefore, the average $3.34 per square foot rent, provided by RentCafe for the Oakland market, is adjusted up to $4.99 per square foot for the rents for a two-bedroom apartment. This approach is conservative because it is likely that the RentCafe survey included some two-bedroom apartments in the average $3.34 rent per square foot.

**Conclusion**

In 2025, a total of 15 new housing units obtained building permits and began construction. Of the 15 new housing units, all but one are ADUs. Using the ABAG / MTC recommended methodology, staff found the following:

- Four (4) of the new housing units can be characterized as affordable to households with very low incomes.
- Five (5) of the new housing units are characterized as affordable to households earning low incomes.
- Four (4) of the new housing units are characterized as affordable to households earning moderate incomes.
- Lastly, two (2) ADUs are characterized as affordable to households earning above moderate incomes. A total of three above moderate-income units obtained building permits, consisting of the two ADUs and the addition of the one single-family residence at 146 Wildwood Gardens.

For addresses, sizes, and numbers of bedrooms, see the list of New Housing Units Obtaining Building Permits in 2025 and Dwelling Unit Applications Seeking Planning Entitlements on the following pages.

**New Housing Units Obtaining Building Permits in 2025 in Piedmont, CA**

| | Address | Size | Bedrooms | Estimated Rent Per S.F. | Projected Rent |
|---|---|---|---|---|---|
| 1 | 318 B Hillside Avenue ADU | 450 s.f. | 1 | 3.34 | L - $1,503 |
| 2 | 318 C Hillside Avenue ADU | 525 s.f. | 0 | 3.34 | L - $1,754 |
| 3 | 237 B El Cerrito Avenue ADU | 798 s.f. | 2 | 4.99 | AM - $3,982 |
| 4 | 1049 B Harvard Road ADU | 342 s.f. | 0 | 3.34 | VL - $1,142 |
| 5 | 1159 B Harvard Road ADU | 523 s.f. | 0 | 3.34 | L - $1,747 |
| 6 | 21 B Cambridge Way ADU | 500 s.f. | 1 | 3.34 | L - $1,670 |
| 7 | 365 B San Carlos Avenue ADU | 800 s.f. | 0 | 3.34 | AM - $2,672 |
| 8 | 146 Wildwood Gardens SFR | SFR | N/A - SFR | N/A | AM - N/A |
| 9 | 146 B Wildwood Gardens ADU | 486 s.f. | 0 | 3.34 | L - $1,623 |
| 10 | 71 B Dudley Avenue | 952 s.f. | 2 | 4.99 | AM - $4,751 |
| 11 | 158 B Wildwood Gardens | 667 s.f. | 1 | 3.34 | L - $2,228 |
| 12 | 1529 B Grand Avenue ADU | 417 s.f. | 1 | 3.34 | VL - $1,393 |
| 13 | 307 B El Cerrito Avenue ADU | 790 s.f. | 0 | 3.34 | M - $2,639 |
| 14 | 235 B Mountain Avenue ADU | 432 s.f. | 0 | 3.34 | L - $1,443 |
| 15 | 221 B Bonita Avenue ADU | 472 s.f. | 0 | 3.34 | L - $1,577 |

ADU Affordability Distribution, incorporating ABAG Study

| | |
|---|---|
| | Very Low 4 units (<30%) |
| | Low 5 units (<30%) |
| | Moderate 3 units (<30%) |
| | Above Moderate 3 units (>10%) |

**Dwelling Unit Applications Seeking Planning Entitlements 2025 in Piedmont CA**

| | Address | Size | Bedrooms | Estimated Rent PSF | Projected Rent |
|---|---|---|---|---|---|
| 1 | 1135 B Oakland Ave | 696 sf basement conversion | 0 | 3.34 | 2,325 |
| 2 | 283 B Scenic Ave | 1,180 sf within new SFR | 2 | 4.99 | 5,888 |
| 3 | 318 C Hillside Ave | 525 sf garage conversion | 0 | 3.34 | 1,754 |
| 4 | 307 B El Cerrito Ave | 790 sf basement conversion | 0 | 3.34 | 2,639 |
| 5 | 50 B La Salle Ave | 850 sf ADU detached | 0 | 3.34 | 2,839 |
| 6 | 235 B Mountain Ave | 432 sf ADU detached | 0 | 3.34 | 1,443 |
| 7 | 124 B Mesa Ave | 529 sf ADU addition | 0 | 3.34 | 1,767 |
| 8 | 45 B Lake Ave | 777 sf detached 2 story | 1 | 3.34 | 2,595 |
| 9 | 48 B Ronada Ave | 799 sf basement addition | 1 | 3.34 | 2,669 |
| 10 | 62 B York Dr | 352 sf garage conversion | 0 | 3.34 | VL 1,176 |
| 11 | 101 B Bonita Ave | 838 sf detached | 1 | 3.34 | 2,799 |
| 12 | 255 B La Salle Ave | 387 sf detached | 0 | 3.34 | VL 1,293 |
| 13 | 571 B Crofton Ave | 800 sf garage conversion | 2 | 4.99 | 3,992 |
| 14 | 21 B Sierra Ave | 675 sf detached | 0 | 3.34 | 2,255 |
| 15 | Howard Ave ADU 1 | 800 sf attached basement | 2 | 4.99 | 3,992 |
| 16 | Howard Ave ADU 2 | 800 sf attached basement | 2 | 4.99 | 3,992 |
| 17 | 31 B Jerome Ave | 481 sf detached | 0 | 3.34 | 1,607 |
| 18 | 2058 Oakland Ave | lot split only | N/A | | |
| 19 | 1332 C Grand Ave | 800 sf detached cottage | 1 | 3.34 | 2,672 |
| 20 | 1835 Trestle Glen | lot split only | N/A | | |
| 21 | 154 Scenic Ave | SFD | N/A | | |
| 22 | 152 Scenic Ave | SFD | N/A | | |
| 23 | 21 Sierra Ave | SFD | N/A | | |

| | | | | | |
|---|---|---|---|---|---|
| 24 | Howard Ave 1 | 800 sf attached | 2 | 4.99 | 3,992 |
| 25 | Howard Ave 2 | 800 sf attached | 2 | 4.99 | 3,992 |
| 26 | 31 Jerome Ave | 1,000 sf + SFR | N/A | | |
| 27 | 356 B Mountain Ave | 370 sf garage conversion | 0 | 3.34 | VL 1,236 |
| 28 | 316 B Pala Ave | 410 sf JADU basement | 0 | 3.34 | VL 1,369 |
| 29 | 154 B Scenic Ave | 776 sf attached basement | 2 | 4.99 | 3,872 |
| 30 | 152 B Scenic Ave | 800 sf attached basement | 2 | 4.99 | 3,992 |

ADU Affordability Distribution, incorporating ABAG Study

| | |
|---|---|
| | Very Low 5 units (<30%) - $1,176 to $1,443 |
| | Low 5 units (<30%) - $1,607 to $2,325 |
| | Moderate 7 units (<30%) - $2,595 to $2,839 |
| | Above Moderate 11 units (>10%) $ 3,872 to $5,888 |

Alameda County Housing & Community Development
Income and Rent Limits

The following Income and Rent Limits are compiled from HUD, State HCD, and TCAC. To access the reference material please use the following links.

| | |
|---|---|
| HUD | https://www.huduser.gov/portal/datasets/il.html |
| State HCD | https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits |
| TCAC | https://www.treasurer.ca.gov/ctcac/compliance.asp |

The current limits are effective as of the following dates.

| | | |
|---|---|---|
| HUD | | |
| | Income Limits | April 1, 2025 |
| | Rent Limits | June 1, 2025 |
| State HCD | | |
| | Income Limits | April 23, 2025 |
| | Rent Limits | June 1, 2025 |
| TCAC | | |
| | Income Limits | April 1, 2025 |
| | Rent Limits | April 1, 2025 |

Please note that the compiled limits are based on the limits used by projects within Alameda County HCD's portfolio of affordable housing projects. To determine which limits to use please always reference the Regulatory Agreement for the project.

Alameda County Housing & Community Development
Income Limits
(TCAC as of 04/01/2025, HUD as of 04/01/2025, State HCD as of 04/23/2025)

| | | HH Size | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Source | Income Level | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| State HCD | 15% | $16,750 | $19,150 | $21,550 | $23,950 | $25,850 | $27,800 | $29,700 | $31,600 |
| TCAC | 20% | $22,380 | $25,580 | $28,780 | $31,960 | $34,520 | $37,080 | $39,640 | $42,200 |
| **TCAC** | **30%** | **$33,570** | **$38,370** | **$43,170** | **$47,940** | **$51,780** | **$55,620** | **$59,460** | **$63,300** |
| **HUD[1]** | **30%** | **$33,600** | **$38,400** | **$43,200** | **$47,950** | **$51,800** | **$55,650** | **$59,500** | **$63,300** |
| TCAC | 35% | $39,165 | $44,765 | $50,365 | $55,930 | $60,410 | $64,890 | $69,370 | $73,850 |
| TCAC | 40% | $44,760 | $51,160 | $57,560 | $63,920 | $69,040 | $74,160 | $79,280 | $84,400 |
| TCAC | 45% | $50,355 | $57,555 | $64,755 | $71,910 | $77,670 | $83,430 | $89,190 | $94,950 |
| **TCAC** | **50%** | **$55,950** | **$63,960** | **$71,950** | **$79,900** | **$86,300** | **$92,700** | **$99,100** | **$105,500** |
| **HUD[1]** | **50%** | **$55,950** | **$63,950** | **$71,950** | **$79,900** | **$86,300** | **$92,700** | **$99,100** | **$105,500** |
| TCAC | 55% | $61,545 | $70,345 | $79,145 | $87,890 | $94,930 | $101,970 | $109,010 | $116,050 |
| **TCAC** | **60%** | **$67,140** | **$76,740** | **$86,340** | **$95,880** | **$103,560** | **$111,240** | **$118,920** | **$126,600** |
| **HUD** | **60%** | **$67,140** | **$76,740** | **$86,340** | **$95,880** | **$103,560** | **$111,240** | **$118,920** | **$126,600** |
| TCAC | 70% | $78,330 | $89,530 | $100,730 | $111,860 | $120,820 | $129,780 | $138,740 | $147,700 |
| **TCAC** | **80%** | **$89,520** | **$102,320** | **$115,120** | **$127,840** | **$138,080** | **$148,320** | **$158,560** | **$168,800** |
| **HUD[1]** | **80%** | **$87,550** | **$100,050** | **$112,550** | **$125,050** | **$135,100** | **$145,100** | **$155,100** | **$165,100** |
| **TCAC** | **100%** | **$111,900** | **$127,900** | **$143,900** | **$159,800** | **$172,600** | **$185,400** | **$198,200** | **$211,000** |
| **State HCD** | **100%** | **$111,850** | **$127,850** | **$143,800** | **$159,800** | **$172,600** | **$185,350** | **$198,150** | **$210,950** |
| State HCD | 120% | $134,250 | $153,400 | $172,600 | $191,750 | $207,100 | $222,450 | $237,750 | $253,100 |

Notes:
1. State HCD's 30%, 50%, and 80% income levels match HUD's published 30%, 50%, and 80% income levels.
2. The 2025 published HUD Median Family Income for a Household of 4 is $159,800.

Alameda County Housing & Community Development
Rent Limits
(TCAC as of 04/01/2025, HUD as of 06/01/2025, State HCD as of 06/01/2025)

| | | Bedroom Size[1] | | | | |
|---|---|---|---|---|---|---|
| Source | Income Level | ST/SRO | 1 BR | 2 BR | 3 BR | 4 BR |
| **TCAC** | **20%** | **$559** | **$599** | **$719** | **$831** | **$927** |
| **County HCD[2]** | **20%** | **$559** | **$639** | **$719** | **$799** | **$863** |
| **TCAC** | **30%** | **$839** | **$899** | **$1,079** | **$1,246** | **$1,390** |
| **County HCD[2]** | **30%** | **$840** | **$960** | **$1,080** | **$1,198** | **$1,295** |
| TCAC | 35% | $979 | $1,049 | $1,259 | $1,454 | $1,622 |
| TCAC | 40% | $1,119 | $1,199 | $1,439 | $1,662 | $1,854 |
| TCAC | 45% | $1,258 | $1,348 | $1,618 | $1,869 | $2,085 |
| **TCAC** | **50%** | **$1,398** | **$1,498** | **$1,798** | **$2,077** | **$2,317** |
| **HUD[3]** | **50%** | **$1,398** | **$1,498** | **$1,798** | **$2,077** | **$2,317** |
| **County HCD[2]** | **50%** | **$1,398** | **$1,598** | **$1,798** | **$1,997** | **$2,157** |
| TCAC | 55% | $1,538 | $1,648 | $1,978 | $2,285 | $2,549 |
| **TCAC** | **60%** | **$1,678** | **$1,798** | **$2,158** | **$2,493** | **$2,781** |
| **County HCD[2]** | **60%** | **$1,678** | **$1,918** | **$2,158** | **$2,397** | **$2,589** |
| **HUD[3]** | **65%** | **$1,798** | **$1,928** | **$2,316** | **$2,667** | **$2,955** |
| **County HCD[2]** | **65%** | **$1,818** | **$2,078** | **$2,338** | **$2,596** | **$2,804** |
| TCAC | 70% | $1,958 | $2,098 | $2,518 | $2,908 | $3,244 |
| TCAC | 80% | $2,238 | $2,398 | $2,878 | $3,324 | $3,708 |
| County HCD[2] | 90% | $2,517 | $2,877 | $3,237 | $3,595 | $3,883 |
| TCAC | 100% | $2,796 | $2,996 | $3,596 | $4,154 | $4,634 |

**HOME Rent Limits**

| | | Bedroom Size[1] | | | | |
|---|---|---|---|---|---|---|
| Source | Income Level | ST | 1 BR | 2 BR | 3 BR | 4 BR |
| HUD[3] | Low HOME | $1,398 | $1,498 | $1,798 | $2,077 | $2,317 |
| HUD[3] | High HOME | $1,798 | $1,928 | $2,316 | $2,667 | $2,955 |

**Fair Market Rents**

| | | Bedroom Size[1] | | | | |
|---|---|---|---|---|---|---|
| Source | Income Level | ST | 1 BR | 2 BR | 3 BR | 4 BR |
| HUD[3] | Fair Market | $1,937 | $2,201 | $2,682 | $3,432 | $4,077 |

Notes:
1. To find rent limits for 5 bedroom and 6 bedroom units please refer to TCAC and HUD's published limits. Those bedroom sizes are not included in the table as the County's affordable housing portfolio does not include units of those sizes.
2. County HCD rent limits should only be used for projects that used the Assumed Household Size of 1 person per ST, 2 people per 1 BR, 3 people for 2 BR, 4 people per 3 BR, 5 people per 4 BR. The County HCD rent limits are calculated as 1/12th of 30% of the AMI's income limit. Please confirm with each project's Regulatory Agreement that this is the correct calculation to use when determining each units rent limit.
3. State HCD's HOME rent limits match HUD's published HOME rent limits.

# Background Documentation

RentCafe.com Rental Type Piedmont Average Rent Blog Calculators

Piedmont ca Price Beds Baths Rent Specials Available Now Filters

**When were prices and availability in Piedmont, Alameda County, CA last updated?**

Prices and availability in Piedmont, Alameda County, CA were last updated on 13 Feb 2026.

**What are the best apartments in Piedmont, Alameda County, CA?**

The best apartment in Piedmont, Alameda County, CA is: 1658 B Lower Grand Ave.

**What is the average rent in Piedmont, Alameda County, CA?**

The average rent in Piedmont, Alameda County, CA is $2,473.

**What type of rental buildings are in Piedmont, Alameda County, CA?**

In Piedmont, 10% of the residents are renting compared to 90% owning a home, according to data from the U.S. Census Bureau. Large-scale apartment buildings with more than 50 units represent none of Piedmont's rentals, 12% are small-scale complexes with under 50 units, and 88% are single-family rentals.

**What do typical apartment communities look like in Piedmont, Alameda County, CA?**

The average age of rental buildings in Piedmont is 34 years old, with 42% being newer apartment buildings completed since 2000. The average height of apartment buildings in the city is 6 stories, of which 31% are garden-style apartment communities, 58% are mid-sized buildings, and 20% are high-rises. These characteristics describe large-scale apartment communities of 50 apartments or more.

**What apartment floorplans are common in Piedmont, Alameda County, CA?**

Rental apartments in Piedmont come in a range of sizes and floorplans. Studio apartments represent 13% of units for rent, ideal for singles, renters on a budget and people who value central locations more than space. Rentals with 1-bedroom floorplans make up 69% of the total apartments in the city, while 2-bedroom floorplans represent around 17% of all rentals in Piedmont. The rest are larger floorplans with 3 bedrooms or more, typically preferred by families, larger households or roommates sharing space.

RentCafe.com Rental Type **Oakland Average Rent** Cost of Living in Oakland Blog Calculators

## Oakland, CA Rental Market Trends

Last updated: February 09, 2026 | Source: RentCafe Market Analysis, Yardi Matrix, U.S. Census Bureau

### Highlights

- The average rent for an apartment in Oakland is $2,565, a 1% increase compared to the previous year, when the average rent was $2,540.
- Studio Apartments at $2,007 offer the most budget-friendly option with 509 square feet, ideal for single renters prioritizing location over space.
- One-bedroom apartments provide 693 square feet for $2,360, balancing privacy and affordability.
- Two-beedroom units at $3,158 offer 1,041 square feet, perfect for roommates or small families.
- Three-bedroom apartments deliver maximum space (1,393 sq ft) for $4,412, suitable for larger households.

rentcafe.com/average-rent-market-trends/us/ca/oa...

Average rent in Oakland, CA

Last updated: February 09, 2026

| | Average Rent | Average Apartment Size |
|---|---|---|
| All Rentals | $2,565 | 769 sq. ft. |
| Studio | $2,007 | 509 sq. ft. |
| 1 Bed | $2,360 | 693 sq. ft. |
| 2 Beds | $3,158 | 1,041 sq. ft. |
| 3 Beds | $4,412 | 1,393 sq. ft. |

## Oakland, CA rent trends

rentcafe.com/average-rent-market-trends/us/ca/oa...


## What's the typical rent budget in Oakland, CA?


The largest share of rentals in Oakland, CA (34%) fall between $2,001-$2,500 per month. This suggests that most people succesfully find suitable apartments within this price.

## Attachment C

[Streamlined Ministerial Approval Process (SMAP) Dashboard | California Department of Housing and Community Development]

California Department of
**Housing and Community Development**

Grants & Funding | Manufactured & Mobilehomes | Building Standards

# Streamlined Ministerial Approval Process (SMAP) Dashboard

Home › Planning & Community Development › Streamlined Ministerial Approval Process (SMAP) Dashboard

SMAP is an opt-in program for developers that allows a streamlined approval process for qualifying developments in localities that have not yet met their housing targets. Use this dashboard to track jurisdictions' SMAP status.

**Streamlined Ministerial Approval Process (SMAP) Determination Dashboard**

SMAP Dashboard | Determination Summary | Determination Data

| Jurisdiction | Planning Period Evaluated | Period Covered | Next Eval. | VLI Complete? | Lower Complete? | Above Mod Complete? | Most Recent Year APR Submitted by Deadline | Housing Element Compliance | Housing Element Compliance before Deadline | SMAP Status |
|---|---|---|---|---|---|---|---|---|---|---|
| RIVERA | | 2025 | 2030 | | | | | | | |
| PIEDMONT | Full 5th | 2015 - 2022 | June 2027 | No | Yes | Yes | Yes | Yes | N/A | 50% |
| PINOLE | Full 5th | 2015 - 2022 | June 2027 | No | Yes | No | Yes | Yes | N/A | 10% |
| PISMO BEACH | Half 6th | 2021 - 2024 | June 2029 | No | Yes | No | Yes | Yes | N/A | 10% |
| PITTSBURG | Full 5th | 2015 - 2022 | June 2027 | No | Yes | Yes | Yes | Yes | N/A | 50% |
| PLACENTIA | Half 6th | 2022 - 2025 | June 2030 | No | No | No | Yes | Yes | N/A | 10% |
| PLACER COUNTY | Half 6th | 2021 - 2024 | June 2029 | No | No | Yes | Yes | Yes | N/A | 50% |
| PLACERVIL | Half 6th | 2021 - | June | Yes | Yes | No | Yes | Yes | N/A | 10% |

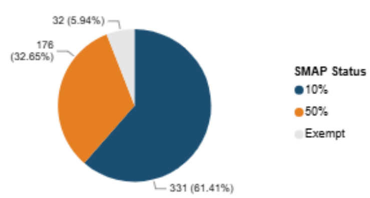
County: All

Jurisdiction: All

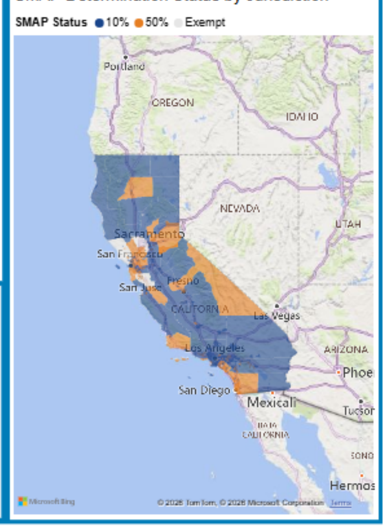
SMAP Status: All

Housing Element Compliance: All

SMAP Determination Status by Jurisdiction




SMAP Determination Status by Jurisdiction




\- + 66%

Microsoft Power BI

‹ 2 of 6 ›

**Attachment D**

## HCD Publishes Determinations About Which Jurisdictions are Subject to State Streamlining Law and Releases New 2025 Housing Production Data

Most.Cities.and.Counties.Must.Streamline.Housing.Developments.that.Include. Affordable.Housing?as.the.Data.Shows.Progress.from.Implementation.and. Enforcement.of.State.Housing.Laws

The California Department of Housing and Community Development (HCD) is pleased to announce the Streamlined Ministerial Approval Process (SMAP) Dashboard displaying an updated list of the California cities and counties that are subject to streamlined housing approvals for specific housing projects and the results of the 2025 Annual Progress Report (APR) collection.

### 2026 SMAP Determination as of 6/30/2026

For most of the state (507 jurisdictions out of 539 jurisdictions), Streamlining is available to developments with at least 50% affordability.

Specifically:

- 32 jurisdictions are exempt from SMAP
- 178 jurisdictions are subject to SMAP for projects with at least 50% affordability
- 329 jurisdictions are subject to SMAP for projects with at least 10% affordability

HCD will host a webinar to give an overview of the recently released Draft SMAP Guidelines update. The webinar will include opportunities to provide comments and ask questions. In that webinar, HCD will also summarize the results of the SMAP determination.

### SMAP Determination Dashboard

The SMAP Dashboard incorporates real-time Housing Element compliance data into the determination in accordance with SB 423 (Wiener, 2023) requirements and provides interactive features for users to explore the data used to produce the determination.

For more information on the SMAP Determination, please visit: Streamlined Ministerial Approval Process (SMAP) Dashboard.

For more information on the most recent housing production data, please visit: Annual Progress Reports - Data Dashboard.

**2025 APR Update:**

The 2026 SMAP Determination is based on data collected on housing construction from jurisdictions' 2025 APR submissions, which show each locality's housing development activity for the calendar year and provide an unparalleled statewide snapshot of new housing development. 2025 APR data showed a slight increase in new housing permitted statewide, up 2% from about 119,000 in 2024 to about 121,000 in 2025, and demonstrated continued progress in California's efforts to address the housing needs of all. The details below reflect data from 497 jurisdictions whose APR data has been processed as of June 1, 2026; HCD is currently working with the remaining jurisdictions throughout the state to collect and process their 2025 APRs.

**Affordable Housing Growth Continues:**

- The share of development affordable to low- and moderate- income Californians continues to grow, especially among multifamily (5+ unit) rental housing. In 2018, 25.7% of multifamily rental housing permitted in California was affordable to low- and moderate-income households. In 2025, that share rose to 54%. This growth has been a notable outcome during Governor Newsom's time in office. From 2019 to 2025, 43.8% of multifamily rental homes permitted are affordable to low- and moderate-income households.
- For housing affordable to extremely low-income households, California saw increases at all stages of the development pipeline from 2024 to 2025. The number of entitled units increased by 122% from 1,511 to 3,350, permitted units by 7.6% from 3,492 to 3,758, and completed units by 36.4%, from 2,741 to 3,739.

**Multifamily and ADU Increases in Housing Activity:**

- Multifamily (5+ units) housing activity remained high in 2025 with statewide totals of 85,610 units entitled, 44,783 permitted, and 49,476 completed, all exceeding 2024 totals of 83,458, 40,342, and 45,908 respectively.
- ADU production continues to increase, with record highs in applications submitted, permits issued, and units completed in 2025. The total number of ADUs permitted in 2025 is nearly 4 times as many as were permitted in 2018.

**Density Bonus Success:**

- Density bonuses account for a substantial share of the new deed-restricted affordable housing being created for lower-income households. Of the more than 60,000 deed-restricted affordable units entitled or permitted in 2025, almost 40,000 were entitled or permitted under a state or local density bonus law.

**Streamlining Production through State Laws:**

- State streamlining laws helped permit 3,259 units this year, a 61% increase from 2024. Of these streamlined units, the amount affordable to lower income households jumped 77% from 2024 to 2025.
- SMAP was utilized to permit 1,565 new units in 2025, representing a 58% rise from 2024 totals. 79% of these SMAP-streamlined units were affordable to lower-income households.

**Looking Ahead**

For additional information, please refer to the Department's Housing Element Implementation and APR Dashboard and raw Housing Element APR Data which has been updated to include data on residential development through December 31, 2025. Since last year, HCD has added features to these tools including:

- Opportunity categories on page 9 of the APR Dashboard to implement AB 2667
- New geographic fields added to the raw APR data including latitude, longitude, standardized address, and match score

**Questions?** For all questions or concerns related to the 2026 SMAP Determination Dashboard please email APR@hcd.ca.gov.