

CITY OF LODI

COUNCIL COMMUNICATION

AGENDA TITLE: Presentation Of The San Joaquin Housing Authority's Annual Report

MEETING DATE: June 5, 2002

PREPARED BY: City Clerk

RECOMMENDED ACTION: None.

BACKGROUND INFORMATION: Antonio Pizano, Executive Director of the San Joaquin Housing Authority, will be at the meeting to present to the Council the Authority's Annual Report.

FUNDING: None required.



Susan J. Blackston
City Clerk

SJB/JMP

APPROVED: _____
H. Dixon Flynn -- City Manager



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Antonio V. Pizano
Executive Director

Board of
Commissioners

Shelly Wilson
Chairperson

Alan Biedemann
Commissioner

Audrey Jordan
Commissioner

Keith Land
Commissioner

Nancy Patron
Commissioner

Luz T. Saucedo
Commissioner

Joan Thorp
Commissioner

May 17, 2002

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City Clerk
City of Lodi
City Hall
221 West Pine Street
Lodi, CA 95240

City Clerk
City of Lodi

Dear Sir:

In compliance with the Health and Safety Code §34328 requiring this Housing Authority to file with the Clerk, at least once a year, a report of its activities, you will find enclosed a copy of our 2001 Annual Report.

Sincerely,

Antonio V. Pizano
Executive Director

JD
Enc.

Administration
209•460•5084
448 S. Center St.
Stockton, CA 95203



SAN JOAQUIN
HOUSING
AUTHORITY

2001
Annual
Report

Undeniably, the tragic events of September 11, 2001 affected all of us in many different forms. For some of us, life may never be the same. What we do with this terrible experience is what will distinguish us from the rest. Besides learning about our vulnerability as a nation, we also learned how to respond with resolute and unwavering force. No matter how frequent or dramatic external forces interfere with our daily routine, we should never give up and wait for someone else to relieve us of such problems. We have an obligation to our nation, our community and our family to conquer adversity.

In San Joaquin County, there are still thousands of families struggling to make ends meet. Thousands of families are dependent on our continued assistance. Many more wait, hoping to just make it to the top of the list. Our obligation to the less fortunate sector of our population does not stop after September 11. Indeed, it becomes more critical under the present economic crisis. Now more than ever, we must pull together as an organization and go beyond the call of duty to comfort and assist the less fortunate.

Let us tackle the opportunity presented us, and continue to expand the benefits of a progressive and forth-thinking organization. Let us concentrate on the many programs, already in place, that require our undivided attention and commitment. Let us be victorious in delivering the best customer service, even when at times the circumstances seem difficult. Let us prepare for the sacrifices we may be asked to make as HUD and other Federal, State and Local program funding gets redistributed. Let us take a proactive approach in search of more efficient and effective ways of carrying out our mission.

It is time to re-focus and set our priorities in order. The San Joaquin Housing Authority Board of Commissioners and the Executive Director stand committed to work with all who are willing to share their knowledge and expertise in the pursuit of creating opportunities and hope for a better tomorrow.



*Antonio Pizano
Executive Director*



*Shelly Wilson
Chairperson*



On the cover and throughout this report you'll see many of the residents and staff who comprise the San Joaquin Housing Authority.

2001 Annual Report

OUR MISSION

The Housing Authority of the County of San Joaquin is dedicated to providing and advocating for affordable, attractive, safe living environments and opportunities to become self-sufficient for persons of very low to moderate income.

OUR VISION

The Housing Authority of the County of San Joaquin will be nationally recognized as an innovative agency and a leader in creating community partnerships that result in individuals and families having hope for a better tomorrow.

GENERAL ACCOMPLISHMENTS IN 2001

- Completed all work under the \$2.44 million "Energy Performance Contract". As of October 1, 2001, all public housing developments have been converted to tenant-paid utilities, and the energy conservation program is underway. Because the HUD utility subsidies have been "locked-in" at levels prior to energy improvements, the Authority will be able to keep a projected \$100,000 per year in utility cost savings.
- Entered into an agreement with San Joaquin County to serve as the "Relocation Coordinator" in support of the County Housing Abatement Program. The Authority now receives administrative fees on a case-by-case basis to assist in relocating families who are displaced when a property is determined to be uninhabitable by the County.
- Acquired a six-unit apartment complex in the City of Lodi. The acquisition (\$255,000) and rehabilitation cost (\$100,000) was financed using a conventional loan and a revolving line of credit from Farmers and Merchants Bank. Five units are completely rehabbed and leased. The sixth unit will be demolished and a new unit built using CDBG/HOME funds from the City of Lodi. The CDBG/HOME funds will be forgivable after a number of years.
- Assisted the City of Stockton and the County of San Joaquin with relocation of displaced families from Mossdale Park (Lathrop), Terry, Cosmos, James, El Tecolote, Earle and Commercial Hotels in the City of Stockton. The individuals from these hotels were assisted with either a public housing unit or a rental assistance voucher. A total number of 92 families were assisted using Section 8 rental assistance vouchers and 9 families with public housing units.

STRATEGIC GOAL ONE:

Enhance the amount, attractiveness, and marketability of our housing stock



- Issued bonds on behalf of Eden Housing, Inc., a nonprofit affordable housing developer, for the acquisition and rehabilitation of Union Court Apartments in Manteca. When completed, Union Court will house 68 very-low income families. The Authority received in excess of \$12,000 as a fee for serving as the issuer and will also receive an annually recurring fee in excess of \$6,000.
- Exercised option to purchase property at 421 South El Dorado Street. Prior to exercising option, the Authority was paying \$5,000 per month to lease the space, but now it pays \$3,421 in mortgage and owns the property.
- Received a \$319,000 three year grant from HUD to fund a resident service coordinator's position at the Franco Center. Following receipt of this award, we approached the Senior Services Agency of San Joaquin (SSA) to formulate a supportive service plan, to be funded by the grant. The services will directly benefit the Franco Center residents.
- Launched the "Lodi RENEW Project" in partnership with the San Joaquin County Human Services Agency and the City of Lodi. This program provides training to welfare-to-work participants in the construction of new single family homes. A \$250,000 line of credit from Farmers and Merchants Bank was secured to fund construction.
- Completed major renovation work at the Franco Center, including complete upgrade and retrofit of the elevator system, boiler system retrofits, new roofing, asbestos abatement, and fire alarm systems. Interior unit rehabilitation is ongoing.
- Facilitated the donation of two vacant parcels in the City of Stockton, suitable for residential development, through the Authority's nonprofit affiliate, Villa Real, Inc.

SECTION 8 HOUSING CHOICE VOUCHER

- Continued outreach to current and potential property owners by conducting three owner workshops where 205 landlords participated. The objective was to inform, retain and attract new owners to the Section 8 housing choice voucher program.
- Received additional funding for 929 Fair Share and 61 Family Unification Program Vouchers. The total budget authority for both awards was \$4,251,391.
- Commenced implementation of the Section 8 Project Based Program. This will enable the HA to enter into contractual relationships with property owners obligating them to set aside some or entire dwelling units for Section 8 program participants.
- An additional 845 families were assisted during the year and at the end of the fiscal year a total number of 3,970 families were on the Program.
- An additional 3,670 families were added to the waiting list.





Lydia Granados, participant in the Family Self-Sufficiency Program, accepts the keys for her new home, built by public housing residents in the Housing Authority's Resident Construction Program.

PUBLIC HOUSING

- An additional 95 families were assisted during the year and at the end of the fiscal year a total number of 1,214 families were on the Program.
- Vacancy rate was 3% and the rent collection was maintained at 98% for the entire fiscal year.
- Substantially completed phase 1 of street improvement and neighborhood identification project at Conway Homes (\$1.25 million).
- Continued exterior building improvement program and site fencing at Sierra Vista, using resident trainees (\$500,000).
- Completed upgrade to the sewer lift station effecting the Thornton developments (\$76,500).
- Completed reroofing work at Diablo, Krafft, and Burton Homes in Tracy (135 units / \$300,000).
- Completed new dual-pane window installation work at Krafft Homes in Tracy (35 units / \$128,000).

MIGRANT FARM LABOR PROGRAM

- Expansion of the "cold weather" shelter program operated by the Stockton Shelter to include the families displaced from the City of Stockton downtown hotels.
- Secured \$700,000 from the State of California Office of Migrant Services for the installation of new exterior siding for 192 units at Artesi II and III.
- Secured \$240,000 from the U.S. Department of Agriculture (Rural Development Department) for the final phase of rehabilitation to the sewer pond system at the Harney Lane Migrant Family Farm Labor Center.

STRATEGIC GOAL TWO:

Increase opportunities
for self-sufficiency
and home ownership
for our clientele

HUMAN RELATIONS DEPARTMENT

- Awarded \$265,593 Public Housing Drug Elimination Program grant from the U.S. Department of Housing and Urban Development.
- Awarded \$26,852 grant from Human Services Agency to implement “Kool Degrees” youth business venture.
- Opened fourth Supportive Services Center in the County, located in Thornton.
- Assisted 48 residents in finding jobs. The average starting wage for job placements was \$8.74 per hour; 75% included full medical benefits; 83% remained employed for at least one year.
- Provided vocational training for 39 residents in the Resident Construction Program and 15 residents in the General Office Assistant Program.

TECHNOLOGY

- Began installation of Signature Systems, Inc., software.
- Implemented “Performance I Pact” web-based performance evaluation software.
- Implemented program for users to access e-mail and files from different locations.
- Centralized storage of users’ files to provide backup.
- Upgraded amount of storage available for users’ files.
- Installed a new web-based Section 8 Landlord Unit Listing System.

2001 SUMMARY OF HOUSING UNITS

Artesi II Migrant Family Farm Labor Center	96
Artesi III Migrant Family Farm Labor Center	96
Harney Lane	95
Conway Homes	436
Sierra Vista	394
Tracy	195
Thornton	50
Sartini Manor	31
Franco Center	110
West Park	12
Washington Street, Lodi	7
Total	1,552
Tenant based Section 8 Voucher/Certificates	4,729
Project-Based Section 8 units	110
HA scattered sites	48





Jean McCullough was named the 2001 Housing Authority Employee of the Year at the annual employee appreciation event.

COMMUNITY PARTNERSHIPS

- Boys and Girls Club of Tracy
- City of Stockton, Parks and Recreation
- City of Stockton Police Department
- Community Medical Centers, Inc.
- Community Works
- Consumer Credit Counselors
- Council for the Spanish Speaking
- Creative Child Care, Inc.
- Delta Health Care
- Economic Opportunity Commission of San Luis Obispo County
- Emergency Food Bank
- Employment and Economic Development Department
- Employment Development Department
- Head Start
- Healthy Children's Collaborative
- Lodi Unified School District
- Mediation Center of San Joaquin County
- Office of Migrant Education
- Planned Parenthood
- Resident Councils: *Conway Homes, Sierra Vista, Tracy Homes, and Thornton*
- San Joaquin A+
- San Joaquin Fair Housing
- San Joaquin General Hospital
- San Joaquin Human Services Agency
- San Joaquin Office of Education
- San Joaquin Rental Property Association
- Service Corps of Retired Executives (SCORE)
- Small Business Development Center
- S.T.A.N.D.
- State of California Office of Migrant Services
- Stockton Shelter for the Homeless
- U.S. Department of Agriculture Rural Development

STRATEGIC GOAL THREE:

Improve
communications and
working relationships,
internally and
externally

BALANCE SHEET, ending September 30, 2001

ASSETS

Cash & Investments	\$10,821,453
Accounts Receivable	2,024,080
Interfund Receivables	831,351
Advances	151,939
Prepaid Expenses	455,789
Fixed Assets	92,938,613
Amount Available in Debt Service Fund	381,497
Amount to be Provided for Long-Term Debt	11,700,686
Total Assets	<u>\$119,305,408</u>

LIABILITIES

Accounts Payable	\$1,917,276
Due Other Government Fund	363,977
Interfund Payables	831,351
Tenant Security Deposits	355,527
Accrued Liabilities	637,515
Deferred Income	444,058
Long-Term Debt, Net of Current	12,082,183
Total Liabilities	16,631,887
Fund Equity	102,673,521
Total Liability & Fund Equity	<u>\$119,305,408</u>

PROFIT AND LOSS STATEMENT, ending September 30, 2001

REVENUE

Dwelling Rents	\$3,588,290
Grants	21,088,494
Reimbursement from HCD	1,057,789
Interest Income	528,356
Other Income	85,936
Total Revenue	<u>\$26,348,865</u>

EXPENSE

Administration	\$3,650,278
Tenant Services	83,415
Utilities	1,347,110
Ordinary Maintenance and Operations	1,832,954
General Expense	3,645,205
Housing Assistance Payments	14,654,436
Extraordinary Maintenance	385,127
Other Expense	416,348
Total Expense	<u>26,014,873</u>
Excess Revenue Over Expense	<u>\$333,992</u>



**2001
EMPLOYEE ROSTER**

Aguirre, Michael F.
Ashley, Betty Jean
Atkinson, Barbara
Avila, Jr., Edward
Barrera, Juan
Bass, Barbara J.
Black, Linda
Bobian, Maria J.
Breedlove, Robert V.

Brown, Vernetta
Brownlee, Charles
Camareno-Clinton,
Stefenee
Cardenas, Lydia L.†
Carnahan, Alfred C.
Constancio, Elia
Cortez Jr., Abel
Cooks, Patricia
Cruz, Juan

Daniels, Joel
Davis, Fabiola
Diaz, Pilar
Dinkins, Nicholas H.
Duffy, Leslie Ann
Dustin, Judith
Emmons, Gregory
Enriquez, Jesus
Fernandez, Connie
Ferrari, Deborah



Housing Authority staff gather for group portraits at the 2001 annual employee appreciation event.

STRATEGIC GOAL FOUR:

Develop and
implement an Asset
Management Plan,
including becoming
economically
independent

Ford, Danny
 Gabrielson, Joan
 Gaitan, Joe
 Garcia, Ruben
 Gastello Jr., Joe
 Gerolaga, Gloria
 Gilbert, Jeffrey
 Graham, Carolyn
 Guilelmino, Janet M.
 Hanson, Jeanne
 Harris, Maria E.
 Hempstead, Venetta R.
 Hernandez, Edmundo
 Hornick, Ken
 Huerta, Frances
 Hunter, Tedd L.
 Jessec, Marc
 Johnson, Janice
 Jones Geri F.
 Jones Jr., Marion
 Joslin, Gustav
 Keener, Henry
 Krager, Marianne
 Lane, Carena
 Lane, Heidi M.
 Larson, Deborah L.
 Ledesma, Amado
 Leon, Eusebio F.
 Lo, Khamkeo
 Lopez, Enrique
 Lopez, Monlisa A.
 Lopez, Susana
 Lyons, Lottic
 Macias, Maria G.
 Maguire, Kara
 Mah, Michelle
 Martinez, Monica
 Matthies, Corinne
 McCullough, Jean
 Mean, Kak
 Murray, Chantay
 Navarro, Robert

Newton, Frank H.
 Orani, Coral
 Ortiz, Richard A.
 Ossino, Suzan
 Perez, Gloria J.
 Pitre, Julienne
 Pizano, Antonio
 Plascencia, Nicolas
 Plummer, Karan
 Preston, James W.
 Quintero, Antonia M.
 Racho, Teddy R.
 Reed, Antoinette
 Reza, Rosalie
 Riberal, David
 Rico, Carlos
 Rinker, J. A.
 Rocha, Elsa
 Sandoval, Ector G.
 Sandoval, Rose V.
 Serna, Richard
 Sharp, Leda L.
 Sido, Edward
 Smith, Patricia
 Spitzer, Louise A.
 Stanbra, Leonila S.
 Steinocher, Stacie M.
 Strauther, Robin
 Terry, Eloise
 Tipton, William R.
 Torres, Jubenal N.
 Trammull, Dorothy L.
 Valdez Jr., Julian
 Williams, Mark
 Valencia, Rosa M.
 Vang, Vue
 Villa, Barnie M.
 Wilder, Cheri D.
 Williams, Michelle O.
 Wilson, Torry T.
 Xiong, Bee
 York, Brian D.

BOARD OF COMMISSIONERS

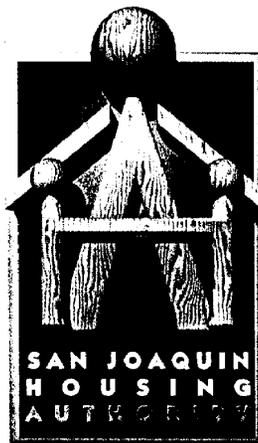
Shelly Wilson
Chairperson
 Nancy Patron
Vice Chairperson
 Keith Land
Vice Chairperson
 Alan Biedermann
Commissioner
 Audrey Jordan
Commissioner
 Luz Teresa Saucedo
Commissioner
 Joan Thorp
Commissioner

EXECUTIVE STAFF

Antonio V. Pizano
Executive Director
 Gus Joslin
Deputy Executive Director
 Karan Plummer
Director of Finance
 Stefenece
 Camareno-Clinton
Director of Human Relations
 Edward Sido
Director of Asset Management



† THIS 2001 ANNUAL REPORT IS DEDICATED IN MEMORY OF LYDIA CARDENAS, A TRUE CHAMPION WHOSE COURAGE AND DEDICATION HAVE BEEN ENGRAVED



People Building Futures

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