

AGENDA ITEM I-01



**CITY OF LODI
COUNCIL COMMUNICATION**

AGENDA TITLE: Presentation of the San Joaquin County Housing Authority's Annual Report
MEETING DATE: June 16, 2004
PREPARED BY: City Clerk

RECOMMENDED ACTION: None required.

BACKGROUND INFORMATION: Edward Sido, Interim CEO with the San Joaquin County Housing Authority, will be at the meeting to make a presentation regarding the Authority's Annual Report.

FUNDING: None required.

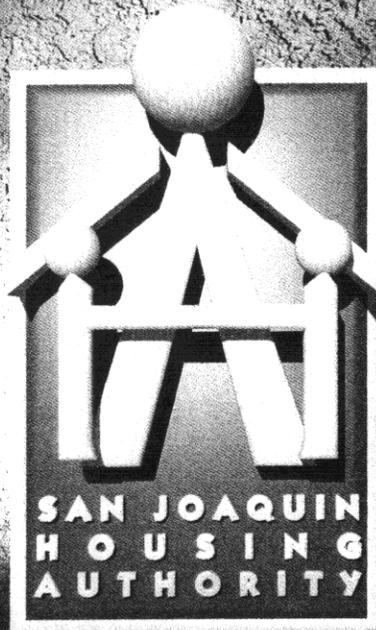


Susan J. Blackston
City Clerk

SJB/JMP

APPROVED: _____
H. Dixon Flynn, City Manager

filed
6-16-04



2003 Community Report

Who we are, What we do, Why we do it.

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Thank you for reviewing the San Joaquin Housing Authority's 2003 Community

Report. Over the next few pages we'll give you a brief description of the Housing Authority, explain it's mission and purpose, and then provide a simple overview of how your dollars are being spent.

We would welcome any comments or feedback you may have after reviewing these pages. Contact information for the Housing Authority is provided on the back cover.

What is the Housing Authority?

The San Joaquin Housing Authority is the agency that is responsible for providing decent, safe, and affordable housing for low-income families, elderly, and the disabled. It was established by state legislation, is federally funded, and has been continually serving the low-income population of San Joaquin County since 1942.

The Housing Authority is overseen by a seven-member board of locally appointed commissioners and an executive staff who implement and manage the County's mandates.

What does the Housing Authority do for the community?

The ongoing general mission of the Housing Authority is to provide and advocate for affordable, attractive, safe living environments for persons of very low to moderate income and to provide opportunities for them to become self-sufficient.

It does this through many specific assistance programs, by forming partnerships with other agencies or businesses, and by overseeing and distributing millions of Federal dollars each year. (See *program descriptions and a financial overview on the following pages.*) These programs, partnerships and the dollars spent are managed to specifically benefit the people of San Joaquin County.

It's important to know that by having a Housing Authority in our community we have a cost-effective method for providing safe, well-maintained housing that is less expensive for those citizens who are unable to afford high-market rates or who may need special assistance or services that would normally be unavailable.

Participants at the Housing Authority's Homeowners Symposium in June of 2003.



The Housing Authority currently assists more than 19,000 people through distribution of 4,817 housing vouchers (which includes single family homes spread throughout the county) and by managing and maintaining 1,075 units in the county's public housing developments.

For over 60 years the Housing Authority has provided shelter and assistance. First, to wartime workers and returning veterans, and then to migrant farm workers and thousands of families. The Authority has designed, built, opened and maintained developments and individual housing units throughout the county. Over the last 20 years the emphasis has been on helping residents with a hand-up and providing the training and support needed to overcome destructive cycles.

How many people does the Housing Authority help?

Housing Authority Programs

Since 1974 the San Joaquin Housing Authority has managed the Housing Choice Voucher Program, providing rent subsidies in the form of housing assistance payments to private landlords on behalf of eligible families. The Housing Choice Voucher Program, funded by the U.S. Department of Housing and Urban Development, provides housing assistance to extremely low and very low-income families, senior citizens, and disabled or handicapped persons. Its objective is to provide affordable, decent and safe housing for eligible families, while increasing a family's residential mobility and choice.

Housing Choice Voucher Program

Since the inception of the Housing Choice Voucher Program, the San Joaquin Housing Authority has aggressively pursued additional funding of its rental assistance program. In 1992 the Program consisted of a total allocation of 2,587 Certificates and Vouchers. Today the allocation stands at 4,817 Vouchers. Over 2.3 million dollars of rent subsidies are currently paid to participating landlords in San Joaquin County each and every month.

The Voucher Program also includes programs such as *Family Self-Sufficiency* and *Welfare to Work*. These are designed to assist families in becoming economically self-sufficient.

The goals for the Housing Choice Voucher program are simple: provide a direct subsidy payment to landlords on behalf of income-eligible families and to provide families a choice on where they live.

The Housing Choice Voucher takes good qualities from past programs. The rules of use ensures families can afford the rental of their choice and the flexibility of the program allows landlords the ability to adjust rents according to market conditions.

Supportive Services Centers

Our Supportive Services Centers help residents to access the resources they need to become economically self-sufficient. Over 400 people visit the Supportive Services Centers each month to search for information or to confer with staff.

Our unique, fully accessible facilities offer: computer-based learning exercises in math, reading and writing; job readiness training, resume preparation assistance and community job placement; tutoring, enrichment and recreational activities; free computer and telephone access for those seeking employment; counseling services for individuals involved in substance abuse or domestic violence; daycare, transportation, social service and affordable housing information.

Family Self-Sufficiency Program

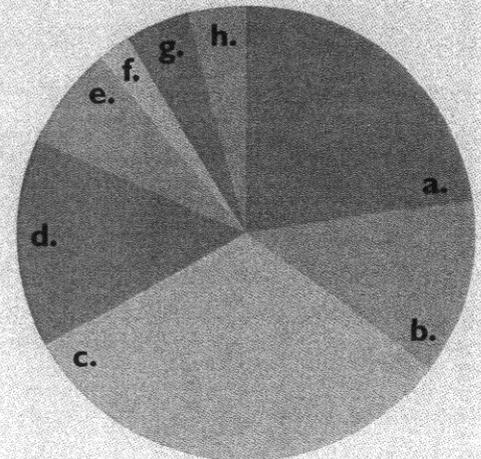
Family Self-Sufficiency (FSS) is a program designed to assist residents in becoming independent of public assistance. With the help of local agencies, FSS combines case management, education, training, and supportive services with rental assistance to aid families toward self-sufficiency.

FSS participants create an action plan for becoming economically self-sufficient. Each family's goal is to become independent of all government support within five years. Family Advocates link participants to the community resources that will help them meet their goals for education and employment, as well as their transportation and child-care needs.

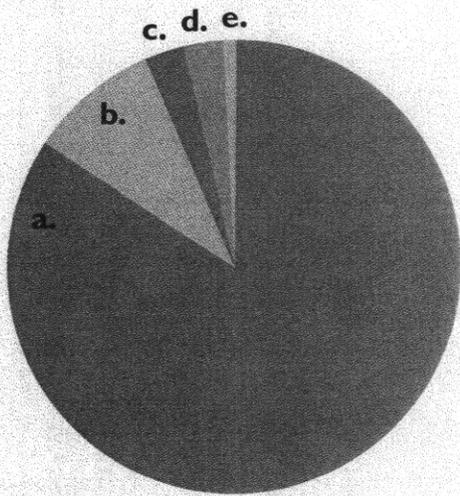
As participants become employed and begin earning higher wages, their proportion of the subsidized rent increases by law. As a contracted incentive, FSS participants retain a portion of that increase in an interest bearing account. When the family has completed its five-year Contract of Participation, and is free from all government subsidies, it may cash out its escrow account. Last year escrow accounts were cashed in amounts from \$2,500 up to \$10,500.

Our Population

a. Housing Choice Vouchers, working:	1,346
b. Housing Choice Vouchers, elderly:	735
c. Housing Choice Vouchers, disabled:	1,885
d. Other:	889
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Subtotal, Housing Choice Vouchers:	4,855
e. Public Housing working households:	427
f. Public Housing elderly households:	137
g. Public Housing disabled households:	269
h. Other:	242
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Subtotal, Public Housing households:	1,075
Total households:	5,930

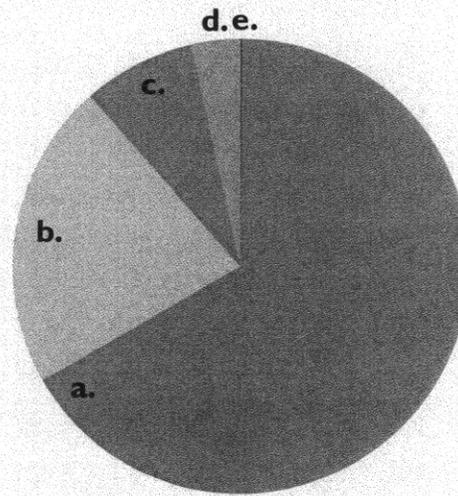


2003 Overview



Revenue

a. Grants:	\$ 32,145,074
b. Dwelling Rents:	3,530,823
c. Reimbursement from HCD:	1,068,328
d. Sale of Fixed Assets:	1,073,225
e. Other Income:	350,258
Total Revenue:	\$ 38,167,708



Expense

a. Housing Assistance Payments:	\$ 23,956,458
b. General/Administration:	7,820,804
c. Maintenance:	2,879,545
d. Services/Utilities:	1,242,941
e. Travel:	45,505
Total Expense:	\$ 35,945,253

Complete financial report is available.

The end result: As participants become self-sufficient, their housing subsidies become available for others wanting to succeed and, as they begin paying higher taxes, it helps to reduce the tax burden on society as a whole.

The Housing Authority has been providing housing and other services to migrant families in San Joaquin County for over 35 years. As pioneers of migrant housing, we are very proud that over the years we have been able to continually improve our programs. Each of our three Migrant Centers consists of 95 units. The State of California's Housing and Community Development, Office of Migrant Services funds the centers. California's Rural Development also provided a loan/grant to help construct the Harney Lane Migrant Center.

One of the County's recent accomplishments was to spearhead the changes needed in state law that would allow our Migrant Centers to remain open for an extended nine months each year in order to coincide with the local school year. For the first time many teenagers are able to graduate from high school without being interrupted by the seasonal closing of the Centers.

The Project-Based Voucher Program is designed to encourage property owners to construct new or upgrade substandard rental housing for low-income families. A change in the law allows Housing Authorities to provide Vouchers for up to 20% of its total

Housing for Migrant Families

The Project-Based Voucher

voucher allocation under the existing Housing Choice Voucher program. At this time we have 125 units under contract.

The rental subsidy in the Project-Based Voucher Program is attached to the property. As long as the family is eligible for Housing Choice Voucher assistance and remains in the rental during the term of the Contract, they receive the rental subsidy. After the first year in occupancy the family may choose to move with continued assistance; however, the Project-Based Voucher assistance remains with the rental. Should the landlord experience unplanned vacancies, the Housing Authority may provide up to two months of rent payments.

What's on the Horizon?

The housing affordability crisis is one of the symptoms of the broadening disparity between the rich and poor of this country. Wages have not kept up with the pace of rising rental costs, very little new affordable housing is being built, families are living in substandard conditions and are homeless or doing without basic necessities such as health care and child care.

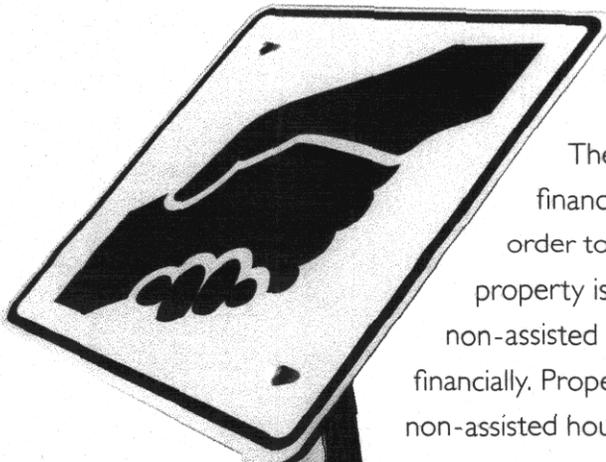
Along with the housing affordability crisis, Public Housing programs have seen a decline in funding and are in the midst of massive cuts in federal funding sources. Public

Housing programs are also faced with the management of age-deteriorated housing inventory and the Housing Choice Voucher Program is looking at a decline in funding levels as well.

The Housing Authority now must create, develop and deliver financing packages with layering, matching and leveraging of funds in order to develop new affordable housing. The "old" 100% subsidized property is a thing of the past. The "new" strategy will be the mixing of non-assisted and assisted housing so property can support and sustain itself financially. Property operating without the need of structured rents is the way that non-assisted housing will help support the assisted housing.

The proposed HOPE VI project for the Sierra Vista Development will be an avenue by which the Housing Authority will be able to lead the move toward seamless, unidentifiable housing which mixes assisted, non-assisted, home ownership and tax credits for housing. The Housing Authority will continue to work with the local community and federal agencies to develop and promote mixed use developments for affordable housing.

Now, and for the foreseeable future, the challenge for the Housing Authority will be to sustain the quality and level of the services we have provided in the past, while operating with diminished Federal funding.



The Housing Authority relies on numerous partners and business affiliations for their insight and support. The following is a partial list of those who help us to complete our mission:

Community Partners

African-American Chamber of Commerce

Boys & Girls Club of Stockton

Boys & Girls Club of Tracy

Central Valley Asian-American Chamber of Commerce

Central Valley Low-Income Housing

Channel Medical Group

City of Stockton Code Enforcement

City of Stockton Department of Housing and Redevelopment

City of Stockton Housing and Redevelopment Agency

City of Stockton office of The City Manager

City of Stockton Parks and Recreation

City of Stockton Police Department

Council for the Spanish Speaking

Creative Child Care, Inc.

Economic Opportunity Commission of San Luis Obispo County

Employment Development Department

Family Resource and Referral Services

Greater Stockton Chamber of Commerce

Head Start Child Development Inc.,

Home Buyer Assistance Center

Lao Khmu Association

Lodi House

Mediation Center of San Joaquin County

Mexican-American Chamber of Commerce

Office of Migrant Education

Resident Councils for Conway Homes, Sierra Vista, Thornton and Tracy Homes

S.T.A.N.D.

San Joaquin County Community Development Department

San Joaquin County Prevention Services

San Joaquin Delta College

San Joaquin Fair Housing

San Joaquin Library and Literacy Foundation

San Joaquin Regional Transit District

San Joaquin Rental Property Association

Seniors First

State of California, Office of Migrant Services

Stockton Police Department

Stockton Unified School District

Thornton Chamber of Commerce

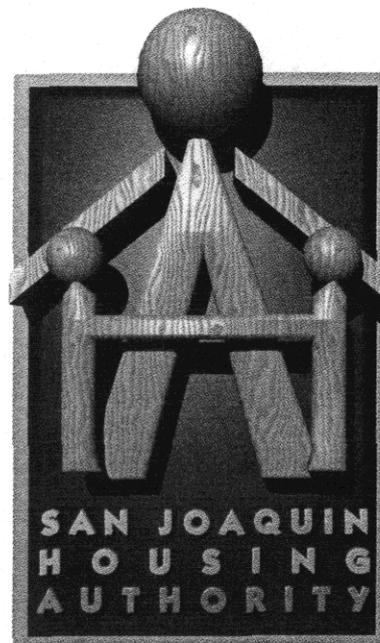
Tracy Chamber of Commerce

U.C. Davis

U.S. Department of Agriculture Rural Development

University of the Pacific

Women's Center



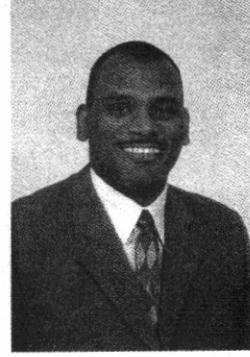
**Executive Staff
as of 9/30/03**

Antonio Pizano
President/Chief Executive Officer

Gus Joslin
Chief Operating Officer

Edward Sido
*Vice President of Assisted
Housing/Chief Financial Officer*

Karan Plummer
Director of Finance



**Board of
Commissioners**

Alan Biedermann
Chairperson

Audrey Jordan

Keith Land

Peggy Metzger



Nancy Perez
Joan Thorp
Shelly Wilson



2003 Employee Promotions

Constancio, Elia
Housing Compliance Supervisor

Jessee, Marc
Maintenance Supervisor

Krager, Marianne
Compliance Supervisor

Lane, Carena
Compliance Supervisor

Lane, Heidi
Compliance Supervisor

Maguire, Kara
Temporary Rental Assistance Manager

Quintero, Toni
Housing Services Manager

Rocha, Elsa
Resident Manager

Retirements & Resignations

Ashley, Betty Jean • 9/02/03

Bass, Barbara J. • 4/25/03

Camareno-Clinton, Stefenee • 7/01/03

Emmons, Gregory • 9/06/03

Fernandez, Connie • 2/28/03

Joslin, Gus • 3/12/04

Larson, Deborah L. • 8/22/03

Leon, Eusebio • 3/11/04

Lyons, Lottie • 1/16/03

McCullough, Jean • 2/28/03

Navarro, Robert • 1/31/03

Pizano, Antonio • 2/27/04

Plascencia, Nicolas • 2/26/04

Plummer, Karan • 1/09/04

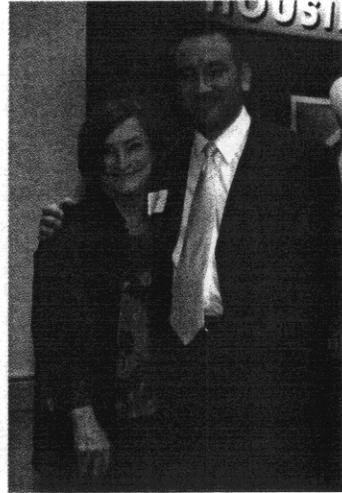
Spitzer, Louise A. • 7/25/03



2003 Employee Achievement Awards

(Photos from top left) Perfect Attendance Awards, l to r: Khameko Lo, Danny Ford, Pilar Diaz (not pictured, Edmundo Hernandez)

Nominees for Employee of the Year, l to r: Susan Ossino, Michelle Mah, Venetta Hempsted, Danny Ford, Maria Harris, Elia Constancio, Linda Black with Antonio V. Pizano



Employee of the Year, Maria Harris with Mr. Pizano

30 Year Employee, Judy Dustin, with Gus Joslin

2003 "Above and Beyond" employee, Marc Jesse with Mr. Pizano



Training Awards: First Row l to r: Patricia Smith,* Rose Sandoval,* Elsa Rocha,* back row l to r: Danny Ford,** Carena Lane,* Michelle Mah,* Isabel Mata*** Frances Huerta,* Fabiola Davis,* Geri Jones,* receiving their awards from Edward Sido

*Housing Choice Voucher Eligibility Specialist Certification from Nan McKay; **Lead-Based Paint Safe Work Practices from Nan McKay; ***Public Housing Manager (PHM) Certification from NAHRO



Sponsors of the Homeownership Symposium held at Sierra Vista Gymnasium in June, 2003.

Successful FSS participant receives welcome basket from Rose Sandoval (on the right) at the door of the home she recently purchased.

Balance Sheet Assets

Fiscal Year Ending
September 30, 2003

Cash & Investments.....	\$ 10,579,829
Accounts Receivable.....	3,789,126
Interfund Receivables.....	3,871,141
Prepaid Expenses and Other Assets.....	2,159,049
Notes, Loans, and Mortgages Receivable—Non-Current.....	479,872
Fixed Assets, Net of Accumulated Depreciation.....	30,798,799
Total Assets.....	<u>\$ 51,677,816</u>

Liabilities

Accounts Payable.....	\$ 1,570,583
Accounts Payable—HUD and Other Government.....	1,100,540
Interfund Payables.....	3,871,141
Tenant Security Deposits.....	342,674
Long-Term Debt, Current Portion.....	547,197
Accrued Liabilities & Deferred Income.....	1,903,070
Long-Term Debt, Net of Current.....	9,684,167
Total Liabilities.....	19,019,372
Net Assets.....	<u>32,658,444</u>
Total Liability & Fund Equity.....	<u>\$ 51,677,816</u>

Revenue and Expense Statement Revenue

Fiscal Year Ending
September 30, 2003

Dwelling Rents.....	\$ 3,530,823
Grants.....	32,145,074
Reimbursement from HCD.....	1,068,328
Interest Income.....	170,930
Other Revenue.....	179,328
Gain/(Loss) on Sale of Fixed Assets.....	1,073,225
Total Revenue.....	<u>\$ 38,167,708</u>

Expense

Administration.....	\$ 5,480,256
Tenant Services.....	149,552
Utilities.....	1,093,389
Ordinary Maintenance and Operations.....	2,655,626
General Expense.....	2,386,053
Housing Assistance Payments.....	23,956,458
Extraordinary Maintenance.....	223,919
Total Expense.....	<u>35,945,253</u>
Excess Revenue Over Expense Before Non-Cash Expense.....	\$ 2,222,455
Less: Non-Cash Item—Depreciation.....	(2,833,955)
Net Revenue/(Expense) after Non-Cash Expense.....	<u>(611,500)</u>

2003 Employee Roster

Aguirre, Michael F.
 Ashley, Betty Jean
 Avila, Jr., Edward
 Barrera, Juan
 Bass, Barbara J.
 Black, Linda
 Bobian, Maria J.
 Breedlove, Robert V.
 Brown, Vernetta
 Brownlee, Charles
 Camareno-Clinton, Stefenee
 Carnahan, Alfred C.
 Celis, Maria
 Childress, Shaneece
 Cobbs, Henry
 Constancio, Elia
 Cortez Jr., Abel
 Cuellar, Susan
 Cruz, Juan
 Davis, Fabiola
 Diaz, Pilar
 Dinkins, Nicholas H.
 Dittrich, Stephen
 Duffy, Leslie Ann
 Dustin, Judith
 Emmons, Gregory
 Fernandez, Connie
 Ford, Danny
 Gabrielson, Joan
 Gaitan, Joe
 Garcia, Daniel
 Garcia, Ruben
 Garza, Cesar
 Gastello Jr., Joe
 Gerolaga, Gloria
 Gilbert, Jeffrey
 Grams, Nancy
 Graham, Carolyn
 Guilelmino, Janet M.

Hanson, Jeanne
 Harris, Maria E.
 Hempstead, venetta R.
 Hernandez, Edmundo
 Huerta, Frances
 Hunter, Tedd L.
 Jessee, Marc
 Johnson, Janice
 Jones, Geri F.
 Jones Jr., Marion
 Joslin, Gustav
 Krager, Marianne
 Kuong, Roeun
 Lane, Carena
 Lane, Heidi M.
 Larson, Deborah L.
 Leon, Eusebio F.
 Lo, Khamkeo
 Lopez, Enrique
 Lopez, Monlisa A.
 Lopez, Susana
 Lyons, Lottie
 Maguire, Kara
 Mah, Michelle
 Martinez, Monica
 Mata, Isabel
 McCullough, Jean
 Mean, Kak
 Murphy, Sandra A.
 Navarro, Robert
 Newton, Frank H.
 Nguyen, Quang
 Orani, Coral
 Ornelas, Diane
 Ortiz, Richard A.
 Ossino, Suzan
 Perez, Gloria J.
 Pitre, Julienne

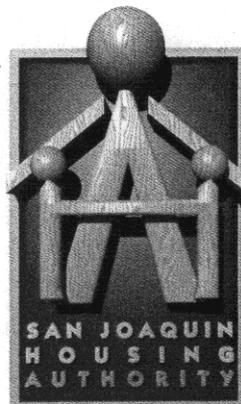
Pizano, Antonio V.
 Plascencia, Nicolas
 Plummer, Karan
 Preston, James W.
 Quintero, Antonia M.
 Racho, Teddy R.
 Reed, Antoinette
 Reza, Rosalie
 Riberal, David
 Rico, Carlos
 Rinker, J A
 Robertson, Kimberly C.
 Rocha, Elsa
 Rodriguez, Cecilia
 Sample, Kimberly
 Sandoval, Ector G.
 Sandoval, Rose V.
 Serna, Richard
 Sido, Edward
 Smith, Patricia
 Spitzer, Louise A.
 Stanbra, Leonila S.
 Steinocher, Stacie M.
 Strauther, Robin
 Torres, Jubenal N.
 Trammull, Dorothy L.
 Ulloa, Conrado
 Valdez Jr., Julian
 Valencia, Rosa M.
 Vang, Vue
 Ward, Brenda
 Wilder, Cheri D.
 Williams, Mark
 Williams, Michelle O.
 Wilson, Torry T.
 Xiong, Bee
 Yang, Mary

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.



People Building Futures

448 South Center Street, Stockton, California 95203 ■ 209.460.5000 • www.hacsj.com