

Housing Authority of the County of Monterey

Strategic Plan 2003-2008

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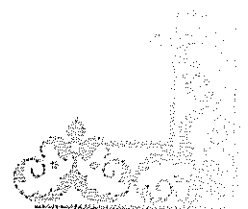
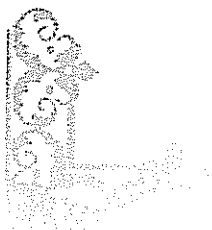


Table of Contents

Executive Summary	p.3
Mission Statement	p.4
Organizational Profile and History	p.4
Chart: Units currently owned, managed or administered	p.5
HACM Strategic Issues	p.5
HACM Goals and Objectives	p.6
Board of Commissioners Resolution	p.8

Executive Summary

During 2002, the Board of Commissioners of the Housing Authority of the County of Monterey undertook a major effort to create a strategic plan for the agency to direct the agency's activities for the next five years.

There are considerable challenges facing the Housing Authority such as major program changes and reduced funding in the core federal housing programs and a critical need for more affordable housing in Monterey County for not only low and moderate income households, but also for various key workforces in the community.

The proposed changes and reduced funding in the core federal affordable housing programs (public housing and Section 8) requires the Housing Authority to ensure a long-term plan to maintain the existing affordable housing stock for the future.

Due to the lack of affordable housing in Monterey County, the Housing Authority is also faced with new opportunities. The County and City governments are in the process of updating their General Plans and Housing Elements to address this issue. The Housing Authority has been invited to participate in these processes. The need for affordable housing for various workforces in the County, especially agriculture and tourism, is critical to the economic stability of the County.

In light of this the Board of Commissioners adopted the following five goals to direct the Housing Authority of the County of Monterey.

The Housing Authority of the County of Monterey will:

- 1) Provide excellent customer service.
- 2) Be the lead affordable housing organization in the County.
- 3) Increase affordable housing opportunities within Monterey County by developing or stimulating development of affordable housing both through in-house development activities and in partnership with, or on behalf of others.
- 4) Ensure long term financial viability for the agency in light of changes in federal, state and local funding and increased scrutiny of housing programs.
- 5) Implement an overall asset management discipline to ensure the long-term physical and financial viability of the assets owned, managed or financed by the agency.

This Strategic Plan defines five major strategic issues facing the agency over the next five years. These issues resulted in the development of five goals. The Plan also defines a number of objectives for each goal. Staff will use these goals and objectives in determining what activities and tasks should be undertaken to assist the agency in achieving these goals. The agency's budget process will allocate funds to implement these goals. There will be an annual assessment of the agency's efforts in achieving these goals at the Board's annual meeting.

Mission Statement

To provide, administer and encourage quality affordable housing and related services to eligible residents of Monterey County.

Organizational Profile and History

The Monterey County Board of Supervisors created the Housing Authority of the County of Monterey on March 21, 1941 by resolution identifying a need for safe and sanitary low-income housing. Since that time the Housing Authority has been operating under the State of California's Health and Safety Code as a Public Housing Authority, independent of the County of Monterey.

The Housing Authority of the County of Monterey administers the Section 8 program, provides property management services for various housing programs, and is developing new affordable workforce housing.

The agency is actively involved in a variety of collaborative efforts to address welfare reform and develop affordable housing within the County of Monterey. The Housing Authority promotes the goals of economic development, self-sufficiency, family unification and community empowerment. In addition, the Housing Authority partners with a broad spectrum of community non-profits, city and county agencies, and state organizations to address a variety of affordable housing issues.

The Housing Authority is supported by grants and special allocations from the U.S. Department of Housing and Urban Development and various State of California housing programs, and rental income from the properties. The agency receives no general fund allocation, tax increment revenue, or special funding from the State of California or the County of Monterey. However, the County and several city governments have made specific grants and loans for specific development efforts or to assist with the rehabilitation of existing properties. In 2002-03, the Housing Authority's budget is approximately \$38.8 million. Of that amount, \$25.3 million or 65% of the total budget is infused into the local economy in the form of Section 8 Housing Assistance Payments. The Housing Authority currently manages 1,400 rental units throughout the County and administers close to 4,000 Section 8 subsidies.

The Housing Authority of the County of Monterey operates under a seven member Board of Commissioners. Two of these Board members reside in Housing Authority family or elderly housing units and are selected to represent the needs and concerns of tenants. Each of the other five commissioners is appointed by his or her Monterey County Supervisor. Current Housing Authority Commissioners are Alan Styles (Chair), Lyn Ann Rosen (Vice Chair), York F. Gin, Josh Stewart, Timothy Escamilla, Mike Nichols, and Carol Schneider. James Nakashima, Executive Director of the Housing Authority, serves as Secretary to the Board of Commissioners.

Units currently owned, managed or administered by HACM
as of March 2003

Units owned or managed	Units administered
694 Public Housing: - 149 Elderly - 545 Family	3,770 Section 8 vouchers includes: 450 Welfare to Work 50 Family Unification
254 Farmworker & Migrant	35 Section 8 Moderate Rehabilitation
68 Family	175 Section 8 New Construction
287 Elderly	11 Shelter Plus Care
56 Transitional	
27 SRO	
1,386 owned or managed units	3,991 administered units

This count will be the starting point to evaluate how well the Housing Authority has achieved its efforts to develop new and preserve existing affordable housing.

Strategic Issues

The Housing Authority's Board of Commissioners assessed the strengths, weaknesses, opportunities and threats facing the Housing Authority and identified five (5) basic strategic issues facing the organization. These strategic issues are opportunities or threats that have the potential to impact the organization's ability to fulfill its vision and are issues that relate directly to the agency's mission statement.

Issue # 1

There is a perception that the Housing Authority of the County of Monterey needs to be more customer service oriented.

Issue #2

The Housing Authority of the County of Monterey should be the lead affordable housing organization in Monterey County.

Issue #3

According to the National Association of Homebuilders 2002 report, Monterey County is the #1 least affordable place to live in the country – a situation that affects everyone in Monterey County.

Issue #4

There will be significant changes in federal, state and local housing programs, including reductions in funding and increased scrutiny by federal, state and local agencies on housing programs.

Issue #5

The long-term financial and physical viability of property (assets) owned and/or managed by the Housing Authority of the County of Monterey is of critical importance to the availability of housing that is affordable to low and moderate income housing in Monterey County.

Goals and Objectives for 2003-2008

The Housing Authority's Board of Commissioners conducted a process to evaluate each strategic issue facing the agency and established a goal to address each of these issues. These goals are outcome statements that will guide a program or management function and are the basis of operational plans established to support the achievement of those goals. The goals and objectives will be used by the Housing Authority to develop an action plan outlining activities and tasks that will need to be undertaken to achieve those goals and objectives. The action plan will be linked to staffing, budget and timelines. The five goals established by the Board of Commissioners are:

Goal #1:

The Housing Authority of the County of Monterey will provide excellent customer service.

Objectives:

- 1.1 Improve customer service for all clients of the Housing Authority
- 1.2 Improve customer service to support staff operations.

Goal #2:

The Housing Authority of the County of Monterey will be the lead affordable housing organization in the County.

Objectives:

- 2.1 Improve the visibility of the Housing Authority in the county.
- 2.2 The Housing Authority should play a role in educating the public and public officials about housing issues and solutions in Monterey County.

Goal #3:

The Housing Authority of the County of Monterey will increase affordable housing opportunities within Monterey County by developing or stimulating development of affordable housing both through in-house development activities and in partnership with or on behalf of others.

Objectives:

- 3.1 The Housing Authority will develop affordable housing through in-house development activities.
- 3.2 The Housing Authority will partner with other agencies, organizations, and businesses to develop affordable housing.
- 3.3 The Housing Authority will stimulate the development of affordable housing by using its financing tools to assist other agencies and organizations in their efforts to develop affordable housing.
- 3.4 The Housing Authority will seek opportunities to participate in the development of new affordable housing and will seek innovative solutions to the lack of affordable housing in Monterey County.

- 3.5 The Housing Authority will actively participate in the preservation of existing affordable housing in Monterey County.
- 3.6 The Housing Authority will seek new federal or state rental subsidies when they are available.

Goal #4:

The Housing Authority of the County of Monterey will ensure long-term financial viability for the agency in light of changes in Federal, State and local funding and increased scrutiny of housing programs.

Objectives:

- 4.1 The Housing Authority will develop new sources of revenue for the agency.
- 4.2 The Housing Authority will take a leadership role in shaping state and federal legislation and public policy to protect the ability of the County to retain its existing affordable housing subsidies and meet its affordable housing needs in the future.
- 4.3 The Housing Authority will continue to ensure compliance with all federal and state requirements.

Goal #5:

The Housing Authority of the County of Monterey will implement an overall asset management discipline to ensure the long-term physical and financial viability of the assets that are owned, managed or financed by the agency.

Objectives:

- 5.1 The Housing Authority will develop a comprehensive capital improvement plan for each property.
- 5.2 The Housing Authority will review all properties periodically to determine the best financing structure for each property.

Attached: Board of Commissioners Resolution Number 2155 endorsing the Strategic Plan.

Resolution No 2155 Approval of Strategic Plan 2003-2008

WHEREAS, the Board of Commissioners of the Housing Authority of the County of Monterey has actively developed a strategic plan to define our focus to the following major strategic issues facing the agency:

- 1) There is a perception that the Housing Authority of the County of Monterey needs to be more customer service oriented.
- 2) The Housing Authority of the County of Monterey should be the lead affordable housing organization in Monterey County.
- 3) According to the National Association of Homebuilders 2002 report, Monterey County is the #1 least affordable places to live in the country – a situation that affects everyone in Monterey County.
- 4) There will be significant changes in federal, state and local housing programs, including reductions in funding and increased scrutiny by federal, state and local agencies on housing programs.
- 5) The long-term financial and physical viability of property (assets) owned and/or managed by the Housing Authority of the County of Monterey is of critical importance to the availability of housing that is affordable to low and moderate income housing in Monterey County, and

WHEREAS, the Board of Commissioners has developed the following goals to address the strategic issues:

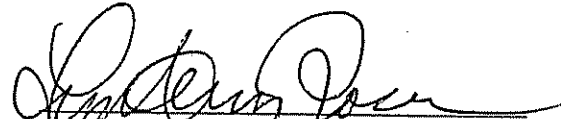
The Housing Authority of the County of Monterey will:

- 1) Provide excellent customer service.
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- 3) Increase affordable housing opportunities within Monterey County by developing or stimulating development of affordable housing both through in-house development activities and in partnership with or on behalf of others.
- 4) Ensure long term financial viability for the agency in light of changes in federal, state and local funding and increased scrutiny of housing programs.
- 5) Implement an overall asset management discipline to ensure the long-term physical and financial viability of the assets owned, managed or financed by the agency.


NOW, THEREFORE BE IT RESOLVED by the Board of Commissioners of the Housing Authority of the County of Monterey that it hereby adopts the Strategic Plan for 2003-2008 and authorizes the Executive Director to direct the operations of the agency to achieve these goals.




Alan Styles, Chair



Lyn Ann Rosen, Vice Chair



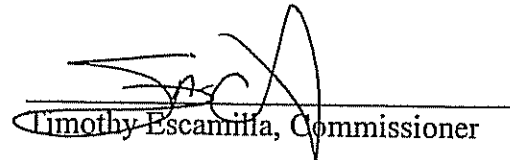
York Gin, Commissioner



Michael Nichols, Commissioner



Josh Stewart, Commissioner



Timothy Escanilla, Commissioner



Carol Schneider, Commissioner