



AMENDED AGENDA

**HYBRID BOARD MEETING FOR
THE HOUSING AUTHORITY OF THE COUNTY OF MONTEREY
BOARD OF COMMISSIONERS**

DATE: MONDAY, FEBRUARY 26TH, 2024

TIME: 5:00 P.M.

LINK: <https://us02web.zoom.us/j/3501891938?pwd=N3d4QWM3MjRQQUtnYnYwZ3dtekxDdz09>

Phone: (669) 900-6833 (*9 to raise hand, *6 to unmute)
Meeting ID: 350 189 1938
Passcode: 438419

LOCATION: Housing Authority of the County of Monterey
Central Office 123 Rico Street
Salinas, CA 93907

ALTERNATE LOCATIONS WITH ZOOM CONNECTON OPEN TO THE PUBLIC:

*10855 Ocean Mist parkway, Castroville CA 95012
Kevin Healy's Open Meeting Location*

1. CALL TO ORDER (Pledge of Allegiance)

2. <u>ROLL CALL</u>	<u>PRESENT</u>	<u>ABSENT</u>
Chair Hans Buder	_____	_____
Vice Chair Kathleen Ballesteros	_____	_____
Commissioner Kevin Healy	_____	_____
Commissioner Francine Goodwin	_____	_____
Commissioner Maria Orozco	_____	_____
Commissioner Yuri Anderson	_____	_____
Commissioner, Vacant	_____	_____

3. COMMENTS FROM THE PUBLIC

4. CONSENT AGENDA

Items on the Consent Agenda are considered routine and, therefore, do not require separate discussion. However, if discussion is necessary or if a member of the public wishes to comment on any item, the item may be removed from the Consent Agenda and considered separately. Questions for clarification may be made by Commissioners without removal from the Consent Agenda. The Consent Agenda is adopted in one motion.

A. Minutes - Approval of Minutes of the Regular Board Meeting held on December 18, 2023.

5. REPORTS OF COMMITTEES

- Personnel Committee
- Finance/Development Committee
- Monterey County Housing, Inc. & Affordable Acquisitions

Commissioner Ballesteros, Chairperson
Commissioners Buder

6. REPORT OF SECRETARY

- A. Executive Report

7. NEW BUSINESS

- A. Resolution 3102: Resolution Establishing New Payment Standards for the Housing Choice Voucher Program
- B. Resolution 3103: Adoption of Bank Account Reconciliation Policy
- C. Schedule for PHA Annual Plan FYB July 2024 Submission – Informational Only
- D. Discussion for Formation of four (4) Ad Hoc Committees and Temporary Suspension of HACM Committee Meetings.

8. INFORMATION

- A. Human Resource Report
- B. Finance Report
- C. Property Management Report
- D. Development Report
- E. Housing Programs Report

9. COMMISSIONER COMMENTS

10. ADJOURNMENT

 This agenda was posted on the Housing Authority’s Bulletin Boards at 123 Rico Street, Salinas, CA.
 The Board of Commissioners will next meet at the Regular Board Meeting on **March 28, 2024 at 5:00 p.m.**

THE PLEDGE OF ALLEGIANCE

I pledge allegiance to the flag of the United States of America

And to the Republic for which it stands

One nation, under God

Indivisible with liberty and justice for all



Updated July 2017

ROLL CALL

Chair Hans Buder

Vice Chair Kathleen Ballesteros

Commissioner Kevin Healy

Commissioner Francine Goodwin

Commissioner Maria Orozco

Commissioner Yuri Anderson



COMMENTS FROM THE PUBLIC



California's Brown Act mandates public comment periods in government meetings, but it's crucial to understand that these sessions aren't intended for dialogue. Instead, they provide citizens with a platform to express their views or concerns, while officials typically refrain from engaging in discussion or debate during this time.

For inquiries regarding specific items in the report, please send questions to grivero@hamonterey.org



ACTION
MINUTES OF THE REGULAR BOARD MEETING OF
THE HOUSING AUTHORITY OF THE COUNTY OF MONTEREY
HELD DECEMBER 18, 2023

SUMMARY ACTION MINUTES

1. CALL TO ORDER/ROLL CALL (Pledge of Allegiance)

CALL TO ORDER:

Chair Buder called the meeting to order at 4:30 p.m.

2. ROLL CALL:

PRESENT:

Chair Hans Buder
Vice-Chair Kathleen Ballesteros
Commissioner Kevin Healy
Commissioner Francine Goodwin

ABSENT:

Commissioner Maria Orozco

Also present: Zulieka Boykin, Executive Director; Jose Acosta, Director of Property Management; Carolina Sahagun-Gomez, Director of Development; James Maynard-Cabrera, Director of Human Resources; Michael Underwood, Director of Finance; Kim Shehorn, Auditor/Controller; Diana Ruiz, Interim Director of Housing Programs; Mayra Zesati, Asset Manager/HCV Supervisor.
Recorder: Gabriela Rivero

3. COMMENTS FROM THE PUBLIC

- A. John Rose, MCHI Representative provided a statement on behalf of MCHI.
- B. Rosa Blanca-Granillo, Resident.
- C. Shawn Granillo, Resident.

***TABLING OF NEW BUSINESS ITEM**

Before the consent agenda was addressed, the Executive Director requested to table Resolution 3098: Resolution Establishing New Payment Standards for the HCV Program. Chair Buder motioned to table the resolution, seconded by Commissioner Ballesteros. The motion was carried through a roll call vote.

AYES: Buder, Healy, Ballesteros, Goodwin

NOES: None

ABSENT: Anderson, Orozco

4. CONSENT AGENDA

Items on the Consent Agenda are considered routine and, therefore, do not require separate discussion. However, if discussion is necessary or if a member of the public wishes to comment on any item, the item may be removed from the Consent Agenda and considered separately. Questions for clarification may be made by Commissioners without removal from the Consent Agenda. The Consent Agenda is adopted in one motion.

- A. Minutes - Approval of Minutes of the Regular Board Meeting held on October 23rd, 2023.

There were no requests to remove items from the Consent Agenda. Commissioner Healy made a motion to approve the listed item, seconded by Commissioner Ballesteros. The motion was carried through a roll call vote.

AYES: Buder, Healy, Ballesteros, Goodwin,

NOES: None

ABSENT: Orozco, Anderson

5. REPORTS OF COMMITTEES

Personnel Committee: Commissioner Ballesteros reported the meeting was cancelled.

Finance and Development Committee: Commissioner Buder reported the meeting was cancelled.

6. REPORT OF SECRETARY

- A. Executive Report – Presented by Executive Director, Zulieka Boykin

Ms. Boykin provided an update on the ongoing correspondence with the USDA regarding the rental increase request for the Farm Labor Sites, including the Chualar Farm Labor Center (Vista Del Valle) and the Salinas Farm Labor Center, noting that approval for the increase is still pending. Efforts in partnership with the Coalition of Homeless Service Providers have led to significant progress in EHV voucher utilization, with 253 vouchers already leased. However, HUD's denial of reissued vouchers post-September 30, 2023, resulted in a decrease in total allocation from 269 to 265. HACM received a "Standard" rating from the San Francisco HUD Field Office for the HCV/SEMAP score, alongside the successful submission of "Corrective Action Plans" and the acquisition of additional vouchers. The City of Salinas has made progress in awarding Housing Stabilization Funds, along with the agency's continuous collaboration with the County of Monterey as they work towards establishing a Memorandum of Understanding (MOU) for the Bridge Housing Funding Program. Within HACM, property management continues to enhance safety protocols, and the Finance Department anticipates the finalization of audits by

December 31, 2023, and the Development Department is in the process of transitioning property management responsibilities for Rippling River.

7. NEW BUSINESS ITEMS

- A. Resolution 3097: Adoption of Disability Accommodation Policy by the Board of Commissioners of the Housing Authority of the County of Monterey.

Motion to approve Resolution 3097: Adoption of Disability Accommodation Policy by the Board of Commissioners of the Housing Authority of the County of Monterey was made by Commissioner Ballesteros and seconded by Commissioner Goodwin. The motion was carried through a roll call vote.

AYES: Buder, Healy, Ballesteros, Goodwin

NOES: None

ABSENT: Anderson, Orozco

- B. Resolution 3098: Resolution Establishing New Payment Standards for the Housing Choice Voucher Program

***TABLED**

- C. Resolution 3099: Resolution for the Conversion of Emergency Housing Vouchers to Housing Choice Vouchers

Motion to approve Resolution 3099: Resolution for the Conversion of Emergency Housing Vouchers to Housing Choice Vouchers was made by Commissioner Anderson and seconded by Commissioner Ballesteros. The motion was carried through a roll call vote.

AYES: Buder, Healy, Ballesteros, Goodwin, Anderson

NOES: None

ABSENT: Orozco

- D. Resolution 3100: Resolution to Authorize YARDI Rent Café Contract Addition

Motion to approve Resolution 3100: Resolution to Authorize YARDI Rent Café Contract Addition was made by Commissioner Ballesteros and seconded by Commissioner Buder. The motion was carried through a roll call vote.

AYES: Buder, Healy, Ballesteros, Goodwin, Anderson

NOES: None

ABSENT: Orozco

- E. Resolution 3101: Memorandum of Understanding with Monterey County Behavioral Health for the Utilization of Behavioral Health Bridge Housing Funds

Motion to approve Resolution 3101: Memorandum of Understanding with Monterey County Behavioral Health for the Utilization of Behavioral Health Bridge Housing Funds was made by Commissioner Ballesteros and seconded by Commissioner Healy. The motion was carried through a roll call vote.

AYES: Buder, Healy, Ballesteros, Goodwin

NOES: None

ABSENT: Orozco

ABSTAIN: Anderson

8. INFORMATION

A. Human Resource Report – Presented by James Maynard-Cabrera, Director of Human Resources

Mr. Maynard-Cabrera highlighted the HR department's commitment to empowering HACM employees to maximize their contributions and drive organizational success. Central to this commitment is the ongoing effort to enhance employee safety and well-being, which includes a strategic initiative to update the safety training program. This initiative encompasses prioritizing safety and well-being, revamping training programs to adapt to evolving workplace dynamics, and leveraging technology to enhance training experiences. Additionally, the reinstatement of the Employee Spotlight Policy aims to recognize and reward exceptional employee efforts. Yardi training sessions have been added to address concerns and guide employees who are new to the system.

B. Finance Report – Presented by Michael Underwood, Director of Housing Programs and Kim Shehorn, Auditor/Controller

Mr. Underwood and Mrs. Shehorn reported various aspects such as voucher funding, HCV payments, departmental transactional statistics, revenue sources by property, balance sheets, budget comparisons, and 12-month income statement reports for both HACM and HDC. Several audits are currently in progress across different properties. In October, HACM reported favorable revenue of \$6.0M, with year-to-date revenue reaching \$23.9M, resulting in a net income gain of \$.3M. However, HDC faced challenges, with revenue of \$.27M, falling \$.23M below budget for October, and a year-to-date net loss of \$.14M. Despite these challenges, the combined entities showed a positive bottom-line gain for October of \$.01M and a year-to-date gain of \$.14M.

Property Management Report – Presented by Jose Acosta, Director of Property Management

Mr. Acosta reported the department successfully completed various tasks, including property questionnaires for RAD site inspections, CREA inspections for Haciendas 3, and bank account setups for online payments across all properties. Goals for December include file audits for NEF RAD sites, city data uploads for Salinas, CCRC inspections, resident orientations for Rent Café transition, and initiating file scanning projects for tax credit sites. Property updates include the progress of the King City Migrant Center rehabilitation, completion of tax credit audits for RAD properties, ongoing repairs and replacements at various sites, and the relocation and rehabilitation plan for Pueblo Del Mar.

- C. Development Report – Presented by Carolina Sahagun-Gomez, Director of Development.
- D. Mrs. Sahagun-Gomez presented an overview of the department's recent accomplishments and outlook. Notable achievements included receiving Hudson Housing Capital's Third Capital Contribution of \$13,182,651 for the One Parkside project, facilitating the payment of the construction loan as per the Limited Partnership Agreement. Additionally, the successful conversion to permanent financing for One Parkside on November 30, 2023, marked a significant milestone. Discussions with potential development partners and progress on ongoing projects like Division Avenue in Salinas and Parcel B Property were highlighted, along with audits, capital improvements, and ongoing initiatives such as the Tynan Modernization job and Project Based Section 8 developments. Updates on staffing included interviews scheduled for the Development Analyst position in mid-December.
- E. Housing Programs Report – Presented by Diana Ruiz, Interim Director of Housing Programs and Mayra Zesati, Housing Programs Supervisor
Mrs. Ruiz reported in November, a total of \$4,989,959 was allocated for HAP in the HCV programs, with \$90,984 for Mainstream and \$557,764 for the Emergency Housing Voucher (EHV) program. The month saw 290 voucher holders actively searching for housing across all programs except EHV, with an additional 95 voucher holders in the EHV program. 91 HQS inspections were conducted, 81 of which were reported to PIC. 10 units were under Zero HAP and no units under abatement. Regarding the Project-Based Voucher (PBV) Program, there are currently 685 project-based vouchers issued and 8,689 applicants on the PBV waiting list. For the Housing Choice Voucher (HCV) Program, there are 330 applications on the waiting list, with 704 removed, 260 housed, and 594 in the process. The Emergency Housing Vouchers program is expected to reach its capacity by the end of the year, with 261 leased and 14 pending. Efforts are underway for the Foster Youth Initiative (FYI) Vouchers, with 4 referrals currently being processed and 3 leased. In the Family Self-Sufficiency (FSS) program, there are currently 99 participants, with 38 families participating in escrowing.

9. **CLOSED SESSION**

The Board of Commissioners met in Closed Session at 6:27 p.m. for the following purpose and reason:

- A. Government Code Section 54956.9(d)(2): This section permits closed session discussions of certain matters relating to litigation involving the public housing board or agency.

The Board of Commissioners reconvened at 7:12 p.m. following a closed session.

No Action items to report.

10. COMMISSIONER COMMENTS

The commissioners expressed their gratitude to all participants in today's meeting and discussed an upcoming Board Retreat scheduled for February.

11. ADJOURMENT

There being no further business to come before the Board, the meeting was adjourned at 7:15 p.m.

Respectfully submitted,

Gabriela Rivero
Executive Assistant/Clerk of the Board

Chairperson

ATTEST:

Secretary

Date



REPORTS OF COMMITTEES

Personnel Committee: Commissioner Ballesteros, Chairperson

Finance/Development Committee: Commissioners Buder

Monterey County Housing, Inc. & Affordable Acquisitions

MEMORANDUM



TO: Board of Commissioners

FROM: Zulieka Boykin, Executive Director

RE: Executive Director Report

DATE: February 18, 2024

The following are some of the highlights of accomplishments or pending projects in process:

INFORMATIONAL UPDATE

Attorney General, Rob Bonta, has issued a letter to all California Housing Authorities concerning the Tenant Protection Act of 2019 (AB 1482). This act has imposed new limits on evictions for tenants living in their unit for at least a year, and caps rent increases for most tenants in California. Under the law, landlords cannot raise rent annually more than 5% plus inflation according to the regional Consumer Price Index, or 10% whichever is lower. (Civ.Code, 1947.12)

Initially, there were questions if this act pertained to Section 8 Housing Choice Vouchers and similar vouchers. However, HUD regulations are clear that rent reasonableness determinations should be consistent with state and local rent control laws. (24 CFR 982.509)

A letter was also received from the Principal Deputy Assistant Secretary for Public and Indian Housing.

HACM complies with AB1482.

CHSP – Coalition of Homeless Service Providers

- The Coalition has opened round 4 of the HHAP funds. We are currently looking at potential projects for application submission.

San Francisco HUD Field Office

- The closeout for the EHV audit is pending a board resolution for bank reconciliations. Once approved the CAP will be submitted immediately to adhere to the February 28th deadline.

City of Salinas- Community Development Department

- This item has been completed ---The City has completed it's final condition of the PBV violation letter. We are awaiting a response from HUD to officially clear the city and the authority.

County of Monterey

- The County is reviewing RFPs submitted for PDM and I anticipate an award announcement in the upcoming weeks.
- The IFB has closed, and HACM is reviewing submitted bids for PDM rehab.
- The HACM is completing an updated application to Health and Human Services for PDM. The new application reflects the program with Monterey County Behavioral Health.

HACM/HDC

PROPERTY MANAGEMENT

- The transition of Rippling River from management by John Stewart Company to management performed by HACM has been completed as of February 15th.

FINANCE DEPARTMENT

- The HACM FY2022 audit has been completed and FY2023 has an anticipated completion date of April 30th.

DEVELOPMENT DEPARTMENT

- The staff is working with consultants to present development agreements for anticipated projects.
- Through a partnership with the County and King City an ERF, Encampment Resolution Funding Program Round 3R, application has been submitted for a shovel ready project.

HCV DEPARTMENT

- The 120% waiver for Fair Market Rents and Small Area Fair Market Rents has been approved by HUD.
- The FSS award closeout package was successfully submitted to HUD.

HUMAN RESOURCES DEPARTMENT

- Working on a comprehensive Employee Handbook

MCHI/MCHI AA

- We received a letter from MCHI about the MOU and agency separation. We will respond by March 7th and determine the next steps.

MISCELLANEOUS

- Family Self Sufficiency Awarded \$184,837 for 2024 calendar year. The award has not been released for acceptance as of today. HUD anticipates release within the next two weeks.



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
WASHINGTON, DC 20410-5000

PRINCIPAL DEPUTY ASSISTANT SECRETARY
FOR PUBLIC AND INDIAN HOUSING

February 09, 2024

Dear Executive Director:

This letter is being sent to all California public housing agencies (PHAs) that administer the Housing Choice Voucher (HCV) program, regarding the Tenant Protection Act of 2019 (hereafter referred to as “TPA 2019”). The TPA 2019 is a California state law that in part prohibits owners from raising rents for most tenants annually by more than 5 percent plus inflation, according to the regional Consumer Price Index, or 10 percent, whichever is lower, while providing a number of limited exceptions from these protections for certain rental properties.

As you are aware, the HCV program is a tenant-based rental assistance program under which the rent to the owner may not exceed the reasonable rent as most recently determined or redetermined by the PHA at all times during the assisted tenancy. The HCV program regulations at 24 CFR part 982.509 provide that, in addition to the rent reasonableness limits, the amount of rent to the owner may also be subject to rent control limits under state or local laws. In other words, owner participation in the HCV program does not automatically exclude the unit and the rent the owner may charge from applicable state or local rent control requirements. While some state and local rent control laws may exclude HCV units from the rent control restrictions, in other cases, the HCV owner is subject to those limitations and is responsible for ensuring that the charged rent complies with the applicable state or local law. These rent control restrictions can prevent an HCV owner from charging the full comparable rent that would otherwise be permitted under the PHA’s rent reasonableness determination, which is based on the rents charged for comparable unassisted units.

On June 29, 2023, Rob Bonta, the Attorney General of the State of California, sent the enclosed letter (“the CA Attorney General’s letter”) to all PHAs stating that the rent control provisions of TPA 2019 apply to HCV-assisted units, citing in part the tenant-based nature of the HCV program. The letter encouraged PHAs to take proactive measures, including issuing public guidance or otherwise informing HCV participating owners of the Attorney General’s determination that HCV units are not exempt from the rent control provisions of TPA 2019. HUD encourages you to provide the CA Attorney General’s letter or otherwise convey his determination that HCV units are subject to the rent control limits to your participating and prospective owners. Prior to the issuance of the CA Attorney General’s letter, there was reportedly a significant amount of uncertainty on this point, and sharing this information with owners will help ensure they understand the applicability of the TPA 2019 rent control limitations to the HCV program. Should your agency receive a rent increase request from an HCV owner that appears to violate the rent control requirements of TPA 2019, it is further recommended that you immediately alert the owner and provide an explanation of the

applicability of TPA 2019 so the owner can revise the rent request to comply with the state law and the HCV program regulations at 24 CFR part 982.509.

Should you have any questions regarding this letter, please contact Michael Dennis, Senior Program Advisor, Office of Public Housing and Voucher Programs, at *michael.s.dennis@hud.gov*.

I hope this information is helpful to you and thank you for your attention to this matter.

Sincerely,

A handwritten signature in blue ink that reads "Richard J. Monocchio". The signature is written in a cursive style with a large initial "R".

Richard J. Monocchio
Principal Deputy Assistant Secretary
Office of Public and Indian Housing

Enclosure



State of California
Office of the Attorney General

ROB BONTA
ATTORNEY GENERAL

June 29, 2023

To: All Housing Authorities in California

Re: Application of California's Tenant Protection Act to Recipients of Section 8 Housing Choice Vouchers

Dear Colleague:

Californians are facing a housing crisis of epic proportion, made worse by the lingering impacts of the COVID-19 pandemic and ongoing economic challenges. Renters, in particular, are navigating housing shortages and skyrocketing costs, which too often make it hard to keep a roof over their heads. Against this backdrop, local housing authorities provide critical support to some of the most vulnerable Californians through administration of the Section 8 Housing Choice Voucher program. I greatly appreciate the work your agencies do to keep Californians housed, and I am writing to ask for your help in ensuring that all tenants – including Section 8 Housing Choice Voucher recipients – receive the benefits of California's tenant protection laws.

In the last several years, as urgency over our state's housing crisis has grown, the California legislature passed a series of new laws aimed at increasing protections for California renters. One such law is the Tenant Protection Act of 2019 (AB 1482). In addition to imposing new limits on evictions for most tenants who have been living in their units for at least a year, the Tenant Protection Act caps rent increases for most tenants in California. Under the law, landlords cannot raise rent annually more than 5% plus inflation according to the regional Consumer Price Index, or 10%, whichever is lower. (Civ. Code, § 1947.12.)

I write to confirm that the Tenant Protection Act applies to recipients of Section 8 Housing Choice Vouchers, and similar vouchers, and to request your assistance in ensuring that landlords participating in the Section 8 program do not impose unlawful rent increases on their tenants. Given that your agencies must approve any rent increases for tenants with Section 8 vouchers, local housing authorities play an important role in protecting those tenants who, as their participation in the Section 8 program signals, can least afford to pay unlawful rent increases. Indeed, HUD regulations and case law make clear that a housing authority's rent reasonableness determinations should be consistent with state and local rent control laws. (24 C.F.R. § 982.509; see also *Barrientos v. 1801-1825 Morton LLC*

(9th Cir. 2009) 583 F.3d 1197, 1209 [holding that “HUD regulation expressly subjects section 8 rent reasonableness determinations to local rent control”].) Unfortunately, my office has learned that some local housing authorities have approved rent increases that violate the Tenant Protection Act, leading landlords to believe, wrongly, that they are in compliance with state law. I ask that you carefully scrutinize future rent increase requests to ensure that they comply with the Tenant Protection Act and any other applicable state or local laws.

Contrary to arguments advanced by some landlords, the narrow exception in the Tenant Protection Act for housing that is restricted as affordable housing by deed, government agency agreement, or other recorded document, or that is subject to an agreement that provides housing subsidies for affordable housing, does not also exempt Section 8 Housing Choice Voucher recipients. (Civ. Code, § 1946.2, subd. (e)(9).) As you know, Section 8 Housing Choice Vouchers help tenants pay for market-rate housing that landlords offer to the general public at market-rate rents. These market-rate units do not constitute “affordable housing” as that term is used in the Tenant Protection Act. Section 8 Housing Choice Vouchers also apply to specific tenancies, not to the housing itself. Market-rate tenancies assisted by Section 8 Housing Choice Vouchers, and other similar voucher programs, are therefore not exempt from the Act’s protections.

This is clear from the Tenant Protection Act’s language, and also from the fact that carving out Section 8 Housing Choice Voucher recipients from the Act’s protections would lead to counterintuitive and unfair results. Consider a large apartment building where two long-term residents – one a Section 8 voucher holder and one not – both receive notices that their rent is increasing from \$1,000 to \$1,500. Clearly, this \$500 increase would be unlawful as applied to the non-Section 8 tenant, since it far exceeds the Tenant Protection Act’s absolute cap of 10%. At most, this tenant could be forced to pay a \$100 (or 10%) monthly rent increase. Absent the Tenant Protection Act’s rent cap protections, however, a housing authority evaluating the Section 8 tenant’s increase might deem the new rent “reasonable” if newer tenants were paying at or near \$1,500. And if the housing authority was already paying the maximum subsidy based on the payment standard, the Section 8 tenant could potentially be forced to bear the entire \$500 increase. This result – a tenant with no voucher paying an additional \$100 per month while their Section 8 neighbor absorbs a \$500 monthly increase - is incongruous and plainly wrong. By declining to certify rent increases of this magnitude, housing authorities will give proper effect to the Tenant Protection Act, and will ensure that vulnerable Section 8 tenants receive protections equivalent to those enjoyed by their otherwise similarly situated neighbors.

Some local housing authorities have already issued public guidance clarifying that the Tenant Protection Act applies to Section 8 voucher recipients. (See, e.g., [Housing Authority of the City of Los Angeles, Section 8 Landlord Newsletter \(March 2020\)](#) (“The Housing Authority has determined that the Tenant Protection Act of 2019 does apply to units that receive tenant based rental assistance.”).) In addition to monitoring future rent increases, I encourage all local housing authorities to take similar steps to make clear to landlords that participating in the Section 8 program does not give them a free pass to ignore state laws, including but not limited to the Tenant Protection Act, or local tenant protections.

All Housing Authorities in California

June 29, 2023

Page 3

Again, I commend your agencies for your daily efforts to ensure that Californians have access to safe and secure housing. Please do not hesitate to contact my office to discuss this letter or any other matter impacting California renters.

Sincerely,



ROB BONTA

Attorney General



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
WASHINGTON, DC 20410-5000

OFFICE OF PUBLIC AND INDIAN HOUSING

January 29, 2024

Ms. Zulieka Boykin
Executive Director
Housing Authority of the County of Monterey
123 Rico Street
Salinas, CA 93907

Dear Ms. Boykin:

The Department of Housing and Urban Development (HUD) reviewed the Housing Authority of the County of Monterey (HACM) request submitted pursuant to **Notice PIH 2023-29, “Certain Regulatory Waivers for the Housing Choice Voucher (including Mainstream) Program and Streamlined Review Process.”** The Notice provided instructions on the streamlined processing of public housing authority (PHA) requests to use specific regulatory waivers for the Housing Choice Voucher (HCV) (including Mainstream) program.

The waivers available under Notice PIH 2023-29 are included in Table 1.

Table 1. List of streamlined regulatory waivers.

Item	Waiver Name	Regulation(s)	Alternative requirement
(A)	Exception payment standards up to 120 percent of the SAFMRs for PHAs that are in mandatory SAFMR areas or have voluntarily chosen to adopt SAFMRs (“Opt-in PHAs”)	24 CFR 982.503(b)(1)(iv)	The PHA may establish exception payment standards up to 120 percent of its applicable FY 2024 SAFMRs.
(B)	Exception payment standards up to 120 percent of the FMR	24 CFR 982.503(c)(1)-(2) and (4)-(5)	The PHA may establish exception payment standards up to 120 percent of their applicable FY 2024 FMRs.
(C)	Exception payment standards up to 120 percent for PHAs that are currently approved for exception payment standard SAFMRs	24 CFR 982.503(b)(1)(iii)	The PHA may establish exception payment standards up to 120 percent of its applicable FY 2024 SAFMRs.
(D)	Applying an increase in the payment standard during the HAP contract term	24 CFR 982.505(c)(4)	The PHA may increase the payment standard for the family at any time after the effective date of the increase, rather than waiting for the next regular reexamination.

HACM's application was submitted by an authorized official and included **HACM's** justifications for the waiver(s) to be granted.

Notice PIH 2023-29 specifies that for waivers A, B, and C, good cause justification requires that the PHA must meet at least one of the following criteria:

- Fewer than 80 percent of the families to whom the PHA issued tenant-based rental vouchers during the most recent 12-month period for which there is success rate data available have become participants in the voucher program; or
- More than 40 percent of families with tenant-based rental assistance administered by the agency pay more than 30 percent of adjusted income as the family share.

Additionally, for all waivers, the PHA must describe the good cause justification that must include (a) why a PHA needs the waiver; (b) the impact on PHA operations or applicants if the waiver is not provided. Additionally, the request must include the requested duration of the waiver, which may not exceed December 31, 2024.

Table 2 indicates which waiver(s) **HACM** requested as well as HUD's determination of the waiver approval or denial. After reviewing the waiver request(s) and considering **HACM** stated justification(s) of good cause, HUD: (1) finds there is good cause to waive, and hereby waives, the regulations and/or requirements marked "APPROVED" in the "Waiver Status" column and/or (2) finds there is not good cause to waive, and therefore does not waive, the regulations and/or requirements marked "NOT APPROVED" in the "Waiver Status" column.

Table 2. List of streamlined regulatory waivers and HUD's determination:

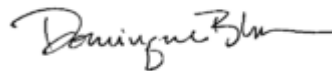
Item	Waiver Name	Regulation(s)	Alternative requirement	Waiver requested?	Waiver status/term expiration
(A)	Exception payment standards up to 120 percent of the SAFMRs for PHAs that are in mandatory SAFMR areas or have voluntarily chosen to adopt SAFMRs ("Opt-in PHAs")	24 CFR 982.503(b)(1)(iv)	The PHA may establish exception payment standards up to 120 percent of its applicable FY 2024 SAFMRs.	YES	APPROVED: Expiration 12/31/2024
(B)	Exception payment standards up to 120 percent of the FMR	24 CFR 982.503(c)(1)-(2) and (4)-(5)	The PHA may establish exception payment standards up to 120 percent of their applicable FY 2024 FMRs.	YES	APPROVED: Expiration 12/31/2024

Item	Waiver Name	Regulation(s)	Alternative requirement	Waiver requested?	Waiver status/term expiration
(C)	Exception payment standards up to 120 percent for PHAs that are currently approved for exception payment standard SAFMRs	24 CFR 982.503(b)(1)(iii)	The PHA may establish exception payment standards up to 120 percent of its applicable FY 2024 SAFMRs.	YES	APPROVED: Expiration 12/31/2024
(D)	Applying an increase in the payment standard during the HAP contract term	24 CFR 982.505(c)(4)	The PHA may increase the payment standard for the family at any time after the effective date of the increase, rather than waiting for the next regular reexamination.	YES	APPROVED: Expiration 12/31/2024

All waiver approvals are set to expire at the end of the term requested or December 31, 2024, whichever is earliest, unless an alternative limit is provided by HUD.

Should you have any questions, please contact the Waiver Processing Team at PIH_Expedited_Waivers@hud.gov.

Sincerely,



Dominique Blom
General Deputy Assistant Secretary



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
WASHINGTON, DC 20410-5000

OFFICE OF PUBLIC AND INDIAN HOUSING

February 16, 2023

Ms. Zulieka Boykin
Executive Director/Chief Executive Officer
Housing Authority of the County of Monterey
123 Rico Street
Salinas, CA 93907

Dear Ms. Boykin:

The Department of Housing and Urban Development (HUD) reviewed the Housing Authority of the County of Monterey (HACM) request submitted pursuant to **Notice PIH 2022-30, “Extension of Certain Regulatory Waivers for the Housing Choice Voucher (including Mainstream and Mod Rehab) Program and Streamlined Review Process.”** The Notice provided instructions on the streamlined processing of public housing authority (PHA) requests to use specific regulatory waivers for the Housing Choice Voucher (HCV) (including Mainstream) program. The waivers you requested are marked “Yes” in column one on the table below.

Background:

In the context of the public health emergency, the CARES Act provided HUD with authority to waive statutes and regulations (except for requirements related to fair housing, non-discrimination, labor standards, and the environment) for the Housing Choice Voucher (HCV) and Public Housing programs. These waivers provided PHAs with the flexibility to adjust program practices where necessary so that they could prioritize mission critical functions. Most CARES Act waivers and alternative requirements contained in Notice [PIH 2021-14](#) (published May 5, 2021) expired on December 31, 2021; specific previously exercised HCV waiver approvals extended into 2022.

Through subsequent PIH notices, and now through PIH Notice 2022-30, HUD provides a streamlined process for PHAs requesting certain regulatory waivers in order to provide continued flexibility to PHAs to respond to the pandemic, especially fluctuating rental markets. Using regulatory waiver authority provided in 24 CFR 5.110, HUD will consider requests to approve regulatory waivers listed in Table 1 below based on a PHA’s statement of good cause.

Table 1. List of streamlined regulatory waivers.

Item	Waiver Name	Regulation	Summary of relief from HUD requirements
(1)	Increase in Payment Standard During HAP Contract Term	982.505(c)(4)	PHAs have the option to increase the payment standard for the family at any time after the effective date of the increase, rather than waiting for the next regular reexamination.

(2)	Voucher Tenancy: New Payment Standard Amount	982.503(b)	PHAs may establish payment standards from 111 to 120 percent of the applicable FMR.
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HACM’s application was submitted by an authorized official and included HACM’s justifications for the waiver(s) to be granted. Notice PIH 2022-30 specifies that good cause justification must include: (a) why a PHA needs the waiver; (b) the impact on PHA operations or applicants if the waiver is not provided; and (c) the proposed waiver duration is limited to only the time necessary for a PHA to resume normal operations and not to exceed December 31, 2023.

Additionally, if requesting a waiver of Regulation 24 CFR § 982.503(b) Voucher Tenancy: New Payment Standard Amount, a PHA must certify that it meets one of the following good cause reasons (explained in further detail in Notice PIH 2022-30): (1) The PHA’s jurisdiction is in a Fair Market Rent (FMR) area identified by HUD to have significant rental market fluctuations, where an increase in the PHA’s payment standards up to 120 percent of the FMR may help the PHA more quickly respond to local circumstances (a list of these FMR areas is attached to Notice PIH 2022-30); (2) Utilization Rate is lower than 98 percent for the current year-to-date or more than a 5 percent reduction between years 2019 and 2021; or (3) less than 85 percent of the PHA’s vouchers issued in the last six months have leased. If your PHA adopts this waiver, please notify PIH_Expedited_Waivers@hud.gov if it elects to change its payment standards back to the basic range between 90 and 110 percent based on the FY 2023 FMR.

After reviewing the waiver request(s) and considering HACM’s stated justification(s) of good cause, HUD: (1) finds there is good cause to waive, and hereby waives, the regulations and/or requirements marked “APPROVED” in the “Waiver Status” column and/or (2) finds there is not good cause to waive, and therefore does not waive, the regulations and/or requirements marked “NOT APPROVED” in the “Waiver Status” column.

List of streamlined regulatory waivers

Waiver Requested	Waiver Status/Term Expiration	Waiver Name	Regulation	Summary of relief from HUD Requirements
Yes	APPROVED: Expiration 12/31/2023	Increase in Payment Standard During Housing Assistance Payment (HAP) Contract Term	24 CFR § 982.505(c)(4)	PHAs have the option to increase the payment standard for the family at any time after the effective date of the increase, rather than waiting for the next regular reexamination.
Yes	APPROVED: Expiration 12/31/2023	Voucher Tenancy: New Payment Standard Amount	24 CFR § 982.503(b)	PHAs may establish payment standards from 111 to 120 percent of the FMR.

All waiver approvals are set to expire at the end of the term requested or December 31, 2023, whichever is earliest, unless an alternative limit is provided by HUD. If any provision of these waivers or their application to any HUD requirement is made invalid by PHA omission or is no longer needed due to changing circumstances, HUD reserves the right to revoke all or a portion of these waivers at any time.

Should you have any questions, please contact the Waiver Processing Team at ***PIH_Expedited_Waivers@hud.gov***.

Sincerely,

 for

Dominique Blom
General Deputy Assistant Secretary

MEMORANDUM



TO: Board of Commissioners
 FROM: Zulieka Boykin, Executive Director
 RE: **Proposed HCV Payment Standard Chart**
 DATE: February 20, 2024

Proposed HCV Payment Standard Chart

February 20, 2024

Proposed HCV Payment Standard Chart

Payment Standards Effective January 01, 2024

The Housing Authority of the County of Monterey will use the HUD (Housing and Urban Development) 50th Percentile Fair Market Rate Success Rate Payment Standards for Monterey County.

Bedroom Size	Efficiency	One Bedroom	Two Bedroom	Three Bedroom	Four Bedroom	Five Bedroom
FMR 2023(Fair Market Rent)	\$2478	\$2507	\$3049	\$4226	\$4660	\$5359
Payment Standard	\$2683	\$2788	\$3399	\$4816	\$5266	\$6056
Percentage	108.27%	111.21%	111.48%	113.96%	113.00%	113.01%

The five-bedroom FMR was calculated by adding 15% over the four-bedroom HUD FMR. Depending on the agency Budget Authority, if necessary, we will reduce the Payment Standard to 100% FMR. At the current time, funding is not an issue; therefore, we will use the waiver up to 120% Payment Standards for all areas except those listed below.

The payment standards below are based on Small Area Fair Market Rents by zip code. These are the high opportunity areas that will assist with over subsidizing low poverty areas. All payment standards range from 90-116% of the SAFRM’s 2024. **This color is 110% SAFMR 2024.**

Zip Code	Area	Efficiency	One Bedroom	Two Bedroom	Three Bedroom	Four Bedroom	Five Bedroom
93908	Corral De Tierra (Salinas)	\$3,861	\$3,905	\$4,752	\$6,589	\$7,260	\$8,349
93921	Carmel-By-The-Sea	\$3,553	\$3,597	\$4,378	\$6,072	\$6,688	\$7,691
93923	Carmel-By-The-Sea	\$3,036	\$3,157	\$3,850	\$5,456	\$5,962	\$6,856
93924	Carmel Valley	\$2,816	\$2,926	\$3,564	\$5,049	\$5,522	\$6,350

93940	Monterey	\$3,113	\$3,234	\$3,949	\$5,599	\$6,116	\$7,033
93950	Pacific Grove	\$3,366	\$3,410	\$4,147	\$5,753	\$6,336	\$7,286
93953	Pebble Beach	\$3,510	\$3,550	\$4,320	\$5,990	\$6,600	\$7,590
93955	Seaside	\$2,695	\$2,794	\$3,410	\$4,829	\$5,280	\$6,072
93962	Spreckels	\$3,861	\$3,905	\$4,752	\$6,589	\$7,260	\$8,349

RESOLUTION 3102

RESOLUTION ESTABLISHING NEW PAYMENT STANDARDS FOR THE HOUSING CHOICE VOUCHER PROGRAM

WHEREAS, the Housing Authority of Monterey County (“HACM”) operates a Housing Choice Voucher program; and

WHEREAS, the HACM can set payment standards up to 120% of the Small Area FMR or FMR; and

WHEREAS, HACM has adequate HAP reserves to fund these increases.

NOW, THEREFORE, BE IT RESOLVED that The Housing Authority of the County of Monterey do hereby approve the attached Payment Standards to be implemented effective January 1, 2024, outlined in the 2/20/2024 memorandum to the Board by Zulieka Boykin, making any necessary changes and corrections.

Chairperson

ATTEST:

Secretary

Date

PASSED AND ADOPTED this 26th day of February 2024, upon motion of _____, seconded by _____ and carried by the following vote-to-wit:

AYES:

NOES:

ABSENT:

MEMORANDUM



TO: Board of Commissioners
THRU: Zulieka Boykin, Executive Director
FROM: Mike Underwood, Finance Director
RE: Resolution 3103: Adoption of Bank Account Reconciliation Policy
DATE: February 12, 2024

As a result of the QAD audit by HUD during September 2023, HACM is required to provide a response and remediation to the finding 2023-05. This finding was that HACM’s financial records were not maintained in such a way that would permit a speedy and effective audit and the HACM’s financial and internal controls need improvement.

Corrective Action No. 2023-05a: The HACM must develop and implement reconciliation policies and procedures that will allow accurate identification of available cash. The HACM must provide a copy of this policy and the associated board approval to the QAD and to the San Francisco Field Office.

Corrective Action No. 2023-05b: The HACM must obtain appropriate training for any financial staff who will be reconciling the HACM’s cash accounts.

Response to 2023-05a: The board has been provided the proposed Bank Account Reconciliation Policy for approval.

Response to 2023-05b: The finance staff have all taken the Yardi training in Aspire that covers “Performing Bank Reconciliations”. This course is numbered AO 355. Training certificates are included as backup in the response to QAD at HUD. A second course was completed by all employees in finance titled Anti-Money Laundering (AML). This was done in our Paylocity payroll system which has extensive training offerings.

We have made significant progress in remediating all areas of the EHV audit and are prepared to move forward in compliance with HUD regulations.

RESOLUTION 3103

ADOPTION OF BANK ACCOUNT RECONCILIATION POLICY

WHEREAS, the Housing Authority of the County of Monterey ("HACM") is committed to maintaining transparency, accountability, and compliance with Federal statutes and regulations; and

WHEREAS, effective financial management necessitates accurate reconciliation of bank accounts on a monthly basis; and

WHEREAS, the HACM recognizes the importance of delineating clear procedures and responsibilities for bank account reconciliation to ensure efficiency and integrity in financial operations; and

NOW, THEREFORE, BE IT RESOLVED, that the HACM hereby adopts the Bank Account Reconciliation Policy, dated January 30, 2024, to govern the reconciliation of all bank accounts controlled by the HACM or its affiliated entities, including the Monterey County Housing Authority Development Corporation ("HDC"); and

BE IT FURTHER RESOLVED, that only the Executive Director or their designee are authorized to approve, open, modify, or close bank accounts associated with the Housing Authority or its affiliated entities; and

BE IT FINALLY RESOLVED, that this Resolution shall be effective immediately upon adoption by the Housing Authority Board of Commissioners.

Chairperson

ATTEST:

Secretary

Date

PASSED AND ADOPTED this 26th day of February 2024, upon motion of _____, seconded by _____ and carried by the following vote-to-wit:

AYES:

NOES:

ABSENT:

Housing Authority of the County of Monterey

Bank Account Reconciliation Policy

Revision - January 30, 2024

I. **POLICY:**

- a. Only the Executive Director or their designee has the authority to approve, open, modify, or close accounts. No individual possesses such authority unless specifically appointed by the Executive Director. This authority extends to all bank accounts controlled by the Housing Authority or its affiliated entities, including the Monterey County Housing Authority Development Corporation (“HDC”).
- b. All bank accounts controlled by the Housing Authority or affiliated entities must be reconciled monthly, within fifteen (15) business days of receipt of the statement. Domestic bank accounts, including credit card merchant accounts, are reconciled by the Finance Department.

II. **PURPOSE:** The purpose of this policy is to ensure that the Housing Authority remains in compliance with Federal statutes and regulations.

III. **SCOPE:** This policy pertains to designated Housing Authority employees within the Finance Department.

IV. **PROCEDURE:**

- a. The bank statement is obtained by mail or online.
- b. Access to the bank statements is restricted to the Executive Director, Director of Finance, the Finance Supervisor, and the Auditor Accountant. Only the Executive Director or Director of Finance is authorized to sign checks, but all are responsible for the Housing Authority and HDC’s financial activities.
- c. The Finance staff or assigned consultant reconciles the bank statement using the reconciliation process available through the Housing Authority’s finance and accounting system.
- d. This process includes the following: comparing deposits per the bank statement with those posted to the finance and accounting system, comparing the checks that cleared the bank account with those outstanding and written through the month, and reconciling bank transfers and deposits.

Housing Authority of the County of Monterey

Bank Account Reconciliation Policy, Rev. January 30, 2024 (con't)

- e. The Finance staff or assigned consultant reviews outstanding reconciling items for stale dates, voided items, cancelled checks, etc.
 - f. Once the account is fully reconciled, the reconciliation and bank statement are given to the Director of Finance for supervisory review.
 - g. After the Director's review and approval, the reconciliation and bank statement are retained Yardi and Smartsheets.
- V. DEFINITIONS:** Any reference to a job position in this policy should be understood to include said employee's designee.

MEMORANDUM

TO: Board of Commissioners
FROM: Zulieka Boykin, Executive Director
RE: **Schedule for PHA Annual Plan FYB July 2024 -*Submission***
Informational Only
DATE: February 20, 2024



The Housing Authority of the County of Monterey is in the process of updating its PHA Annual Plan under the requirements of the Housing and Urban Development Code of Federal Regulations pursuant to Section 903.

The following is a tentative brief timeline of the PHA Annual Plan process:

- | | |
|---|--|
| February 20 th -
April 5 th , 2024 | <u>Display PHA Annual Plan-Draft for public review</u> at HACM |
| March 13, 2024 | Meeting with the Resident Advisory Board |
| March 14, 2024 | Submit PHA Annual Plan-Draft to the Finance/Development Committee for review |
| March 21, 2024 | Public Hearing |
| March 28, 2024 | Submit PHA Annual Plan for approval to the Board of Commissioners |
| February 20 th -
April 5 th , 2024 | Review any additional Public & Resident Advisory Board comments (make changes at discretion of HACM) |
| April 11, 2024 | Submit finalized PHA Annual Plan FYB July 2024 to HUD |

ACTION: *For Information Only.*



Housing Authority of the County of Monterey
PHA Annual Plan FY July 2024-*draft*

Executive Director/ Chief Executive Officer:

Zulieka Boykin

Board of Commissioners:

Hans Buder-Chair
Kathleen Ballesteros-Vice Chair
Kevin Healey-Commissioner
Yuri Anderson-Commissioner
Maria Orozco-Commissioner
Francine Goodwin-Commissioner

Streamlined Annual PHA Plan (HCV Only PHAs)	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires 03/31/2024
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Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, including changes to these policies, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

Applicability. The Form HUD-50075-HCV is to be completed annually by **HCV-Only PHAs**. PHAs that meet the definition of a Standard PHA, Troubled PHA, High Performer PHA, Small PHA, or Qualified PHA do not need to submit this form. Where applicable, separate Annual PHA Plan forms are available for each of these types of PHAs.

Definitions.

- (1) **High-Performer PHA** – A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers, and was designated as a high performer on both the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAP) assessments if administering both programs, or PHAS if only administering public housing.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP troubled, that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceed 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAP assessment and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550, and that was designated as a standard performer in the most recent PHAS and SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined and is not PHAS or SEMAP troubled.

A.	PHA Information.
A.1	<p> PHA Name: <u>Housing Authority of the County of Monterey</u> PHA Code: <u>CA033</u> PHA Plan for Fiscal Year Beginning: (MM/YYYY): <u>07/2024</u> PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) Number of Housing Choice Vouchers (HCVs) <u>5,117</u> PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission </p> <p> Availability of Information. In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information of the PHA policies contained in the standard Annual Plan but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at the main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. </p> <p> <i>The PHA Annual Plan, along with its supporting documents, and the agency's Administrative Plan, can be accessed for review at the Housing Authority of the County of Monterey, located at 123 Rico Street, Salinas, CA 93907, or on our website at www.hamonterey.org. Additionally, we have published a public notice detailing the process for requesting copies of the plan via mail or email.</i> </p>

PHA Consortia: (Check box if submitting a joint Plan and complete table below)

Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program
Lead HA:				

B. Plan Elements.

B.1 Revision of Existing PHA Plan Elements.

a) Have the following PHA Plan elements been revised by the PHA since its last Annual Plan submission?

Y N

- Statement of Housing Needs and Strategy for Addressing Housing Needs.
- Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.
- Financial Resources.
- Rent Determination.
- Operation and Management.
- Informal Review and Hearing Procedures.
- Homeownership Programs.
- Self Sufficiency Programs and Treatment of Income Changes Resulting from Welfare Program Requirements.
- Substantial Deviation.
- Significant Amendment/Modification.

(b) If the PHA answered yes for any element, describe the revisions for each element(s):

B.2 New Activities.

The Housing Authority of the County of Monterey is dedicated to promoting project-based partnerships with community housing developers to increase the availability of affordable housing. By allocating Project-Based Vouchers (PBV's) to new housing developments, the agency aims to extend affordable housing opportunities to individuals and families residing in Monterey County. This effort emphasizes our ongoing commitment to expanding the affordable housing inventory and ensures wider access to high-quality living spaces for families and individuals in our community. Active Project-Based Voucher allocations are as follows:

Project-Based Voucher Allocation			
Property	# of Units	Location	Status*
Step Up/Salinas Homekey	85	Salinas, CA	AHAP
Greenfield Commons I	27	Greenfield, CA	AHAP
Greenfield Commons II	27	Greenfield, CA	AHAP
VTC-Lightfighter Village	17	Marina, CA	AHAP
Magnolia Senior Apartments II	32	Greenfield, CA	AHAP
East Garrison Apartments	15	Marina, CA	HAP

**AHAP: Agreement to Housing Assistance Payment (Preliminary Agreement/Contract)*

HAP: Housing Agreement Payment (Executed Contract)

The Housing Agreement Payment (HAP) contract is in place for East Garrison Apartments. The agency continues to work through the preliminary contract stages for Step Up/Salinas Homekey, Greenfield Commons I & II, VTC-Lightfighter Village and Magnolia Senior Apartments.

The agency is firm on its proactive approach in identifying opportunities to widen the availability of affordable housing throughout Monterey County by strategically utilizing PBV's. The agency is determined to utilize PBV's as a crucial instrument in its goal to fulfill the housing needs of the community by providing a solid foundation for stability and development within the area of Monterey County. This objective is aimed at encouraging the creation and enhancement of accessible and affordable housing projects, guaranteeing that residents enjoy improved access to quality living environments in the community.

B.3

Progress Report.

Provide a description of the PHA’s progress in meeting its Mission and Goals described in its 5-Year PHA Plan.

The Housing Authority of the County of Monterey has achieved significant goals towards fulfilling the objectives outlined in its 5-Year plan, demonstrating a strong commitment to enhancing affordable housing within the community as follows:

- The agency remains actively engaged in identifying and pursuing competitive funding opportunities as they arise, with the primary goal of expanding access to affordable housing for Monterey County residents. This ongoing effort involves staying informed about and responsive to various funding sources, grants, and financial opportunities and partnerships that can support the agency's mission to increase the availability of affordable housing. By using these opportunities and sustaining partnerships with community organizations that align with its objectives and same common goals, the agency continues to further its commitment to addressing the housing needs of the community, ensuring more individuals and families can secure stable, affordable housing in Monterey County.
- The agency continues to further strengthen its collaboration with the Department of Housing and Urban Development and the Department of Veterans Affairs Supportive Housing (HUD-VASH) program by allocating 324 housing vouchers to support the voucher program. This initiative is focused on assisting homeless veterans and their families within Monterey County to secure and maintain permanent housing. Through a cooperative partnership, the HUD-VASH program provides long-term case management, supportive services, and permanent housing support to veterans and their families.
- The agency remains actively engaged in a collaborative partnership with Monterey County Department of Social Services; Family and Children Services, by administering 65 housing vouchers through the Foster Youth to Independence Initiative Program. This collaboration highlights the agency’s dedication to offering essential supportive services to foster youth in Monterey County, aiming to assist them in finding and maintaining stable, permanent housing.
- The agency, in partnership with designated community service providers, has successfully allocated a total of 269 Emergency Housing Vouchers to families experiencing homelessness or that were at risk of becoming homeless within Monterey and San Benito Counties. In its ongoing effort to support this vulnerable demographic, the agency actively pursues opportunities presented by the Department of Housing and Urban Development and community organizations, to continue providing support to these individuals and families so they continue to secure permanent affordable housing.
- The agency ensures the provision of reasonable accommodations, affirming equal opportunities and accessibility for applicant and participant individuals and families with disabilities. Agency staff annually participate in Fair Housing Training, hosted by HUD’s Office of Fair Housing and Equal Opportunity. Furthermore, the agency ensures compliance with the agency’s administrative policies and guidelines set forth by the Department of Housing and Urban Development, specifically concerning the rights and support of disabled individuals and families.
- The agency is diligently taking steps to align with the Housing Opportunity Through Modernization Act (HOTMA) changes mandated by the Department of Housing and Urban Development. This effort is focused on ensuring full compliance with HOTMA's updates, which are designed to modernize and streamline housing policies and practices. By adapting to these changes, the agency will enhance its operational efficiency and effectiveness in managing housing assistance programs, by benefiting the communities it serves through improved service delivery and compliance.

- The Housing Authority continues to maintain Payment Standards that accurately reflect the prevailing rental market conditions of the area. With the continuation of an exception payment standard waiver, the agency adopts the higher limit between 120% of the Small Area Fair Market Rent and 110% of the Department of Housing and Urban Development 50th Percentile Fair Market Success Rate Payment Standards, specifically for Monterey County. This increase in Payment Standards enhances the Housing Choice Voucher program by enabling participants to access housing in higher opportunity areas. It further facilitates equitable access to essential services and resources, supporting the well-being and advancement of families in Monterey County.
- During informational briefings, the agency provides comprehensive details to participants about the opportunities available within the Housing Choice Voucher program. This includes information about agency partnerships that offer supportive services, updates on current rental opportunities, supportive services for disabled individuals, veterans, homeless individuals and families, information about the Family Self-Sufficiency Program, and rights under the Violence Against Women Act (VAWA). These efforts are aimed at broadening information and the range of opportunities, support, and services accessible to all program participants.
- To further increase accessibility, the agency has received approval to conduct briefings remotely. This innovative approach is designed to enhance convenience and ensure accessibility for individuals with disabilities and all participants that benefit from this alternative. The adoption of remote briefings is a strategic move to ensure that there are no barriers to the continued processing and issuance of vouchers and maintains the flow of support and services for the families and individuals the agency serves.
- The agency is actively expanding the range of opportunities available to participants in the Housing Choice Voucher program by enhancing access to the Family Self-Sufficiency Program, now supported by two dedicated coordinators. This effort is aimed at increasing the level of opportunity, participation and assistance provided to Housing Choice Voucher participants who express interest in the Family Self-Sufficiency Program. The agency's continued goal is to encourage enrollment in this program to equip participants with the tools and resources necessary for achieving economic independence and self-sufficiency.
- In August of 2023, the agency hosted a hybrid landlord symposium that proved to be a significant success. The event received a high level of interest from landlords, resulting in increased participation. The agency is now in the process of organizing its next annual landlord symposium. This forthcoming event aims to further engage and educate landlords about the benefits and importance of participating in the Housing Choice Voucher program and their vital role in addressing community housing needs. Through these symposiums, the agency seeks to establish a collaborative environment where landlords can learn more about the program, understand its impact on the community, and explore ways to contribute effectively to meeting local housing needs.
- The agency currently holds a SEMAP (Section Eight Management Assessment Program) score of 74%, which places it within the standard status category for the Housing Choice Voucher program. This score reflects a decline that is largely attributed to the impact of HUD-COVID-19 waivers. These waivers permitted the deferment of certain activities and processes that are integral to the SEMAP scoring framework, directly affecting the agency's overall performance evaluation. In response to this challenge, the agency is actively managing and implementing proactive strategies aimed at enhancing its operational efficiency to elevate the agency's standing to a superior status in future evaluations.

- The agency completed a collaborative Project-Based Voucher partnership with Magnolia Place Senior Apartments II and East Garrison Apartments. The projects completed development stages and collectively have 47 project-based vouchers in place. The culmination of these developments and partnership delivers affordable housing options to senior citizens and families within the Monterey County community.
- The Housing Authority has undergone a recent adjustment in its Renewal Funding Inflation Factor (RFIF), which has now been adjusted to 9%. This adjustment aligns with the latest guidelines set forth by the Department of Housing and Urban Development specifically for Public Housing Agencies (PHAs) operating within California. This update reflects an effort to accurately match funding parameters with the prevailing economic conditions and fluctuating rates, ensuring that the Housing Authority is equipped with the necessary financial resources to continue providing critical housing services in an effective and sustainable manner within its budget authority.
- The agency is in the process of enhancing its internal software systems to maximize technological support, benefiting not only the agency but also applicants, participants, and landlords through expedited services and improved operational efficiencies. Among the notable upgrades is the implementation of Rent Café, which introduces several key features: applicants will have the capability to apply and check their application status online; participants can easily access information and complete their annual re-certifications; and landlords can easily gain access to their account details and payment information. This initiative is aimed at streamlining interactions and facilitating a more efficient and user-friendly experience for all parties involved.
- The agency has formed a partnership with the Monterey County Behavioral Health Department to offer supportive housing for 110 homeless or nearly homeless families at Pueblo del Mar in Marina, CA. This initiative is supported by a Behavioral Health Bridge Housing grant from the state of California. Key aspects of this project encompass collaboration with local service providers and the provision of transitional housing support, designed to aid families in securing permanent housing.
- The agency is actively engaged in evaluating the property requirements of Rippling River Apartments in Carmel Valley, CA, aiming to address the needs of its established housing community. Through this assessment, the agency seeks to identify and implement necessary changes that will ensure the housing community provides a welcoming, safe, and supportive living environment for all its residents.
- The agency is preparing the implementation of the NSPIRE model from the Department of Housing and Urban Development to modernize its Housing Quality Standards (HQS) compliance procedures. This initiative is part of a broader effort to enhance the quality and efficiency of housing unit inspections, ensuring that they meet the necessary safety and health standards. By integrating NSPIRE's innovative approaches and criteria, the agency aims to provide a more effective and streamlined process for assessing the condition of housing units, ultimately improving living conditions for residents, and ensuring compliance with HUD's updated regulatory framework.
- The agency is consistently working to establish and maintain partnerships with community organizations and local city jurisdictions to enhance affordable housing opportunities within Monterey County. In addition to creating new alliances, the agency places high importance on sustaining its existing partnerships with community agencies. These collaborations are essential for providing supportive services to homeless individuals and families, seniors, and persons with disabilities. Such collaborative efforts are essential in advancing the agency's objectives as described in its 5-Year PHA Plan and mission statement, ensuring a comprehensive approach to meeting the diverse housing needs of the community.

B.4

Capital Improvements. – *Not Applicable*

B.5

Most Recent Fiscal Year Audit.

(a) Were there any findings in the most recent FY Audit?

Y N N/A

(b) If yes, please describe:

Financial Statement findings are as follows:

- *The Housing Authority had unclaimed property in the form of checks:*

The Housing Authority accepted the recommendation of the auditor and has made arrangements to comply with regulations from the California State Controller's Office.

Federal Award Findings and Questioned Costs are as follows:

- *The Housing Authority lacks internal controls related to eligibility compliance, particularly in the maintenance of tenant files. The agency has not effectively developed, implemented, or maintained a control system that ensures the program is in compliance:*

The Housing Authority agrees with the auditor's recommendation. The issue pertains to long-standing clients whose extensive files have been archived over time. To provide correction, a directive was issued to staff, mandating the inclusion of the original application in the active working file during archiving processes moving forward.

- *The Housing Authority has identified deficiencies in its internal controls concerning compliance with Housing Quality Standards (HQS) enforcement, specifically within the realm of special tests and provisions. There has been a shortfall in effectively developing, implementing, maintaining, and overseeing an internal control system to ensure adherence to Notice PIH 2021-14(HA):*

Management inadvertently overlooked the requirement to obtain owner certifications during the audit period, as mandated by Notice PIH 2021-14(HA). The Housing Authority has acknowledged this oversight within the Section 8 Housing Choice Voucher and Mainstream Voucher Programs and has continued commitment in establishing and enforcing internal control measures to guarantee adherence to federal regulations and PIH notices.

- *The Housing Authority is deficient in the internal controls over compliance with special tests and provisions related to Housing Quality Standards (HQS) inspections. The agency has not effectively designed or implemented, maintained, or monitored a system of internal controls to ensure the program is in compliance:*

The Housing Authority has recognized deficiencies in the Section 8 Housing Choice Voucher and Mainstream Voucher Programs and has implemented internal control procedures that ensure compliance with federal regulations.

C.	Other Document and/or Certification Requirements.
C.1	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y N <input type="checkbox"/> <input type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p> <p><i>Pending</i></p>
C.2	<p>Certification by State or Local Officials.</p> <p>Form HUD 50077-SL, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p> <p><i>Pending</i></p>
C.3	<p>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</p> <p>Form HUD-50077-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p> <p><i>Pending</i></p>
C.4	<p>Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA’s response to the public.</p> <p>(a) Did the public challenge any elements of the Plan?</p> <p>Y N <input type="checkbox"/> <input type="checkbox"/></p> <p>If yes, include Challenged Elements.</p> <p><i>Pending</i></p>

D. Affirmatively Furthering Fair Housing (AFFH).

D.1 Affirmatively Furthering Fair Housing (AFFH).

Provide a statement of the PHA’s strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.

Fair Housing Goal: Ensuring Fair Housing
Describe fair housing strategies and actions to achieve the goal:

The Housing Authority of the County of Monterey has established and ensured equal opportunity in housing for residents of Monterey County as a strategic goal. To achieve this goal, the Housing Authority continues to affirmatively market its housing programs ensuring they are accessible to families with special needs or disabilities. The Housing Authority remains strongly committed to meeting reasonable accommodation or modification requests that support and promote affordable housing opportunities to disabled families or individuals.

Fair Housing Goal: Furthering Fair Housing Opportunities
Describe fair housing strategies and actions to achieve the goal:

The Housing Authority collaborates with entitlement jurisdictions to integrate outreach and fair housing training opportunities into the plans each jurisdiction develops. By participating in community forums and events, the Housing Authority actively promotes the Housing Choice Voucher Program and aims to broaden fair housing opportunities for families. This collaborative effort ensures that fair housing practices are integrated into community planning and that information about housing options reaches a wider audience.

Fair Housing Goal: Improving Equitable Housing Opportunities for Participants

Describe fair housing strategies and actions to achieve the goal:

Housing Program Specialists work with families to encourage portability and relocation to neighborhoods that offer enhanced opportunities. In briefings, they inform applicants about the availability and locations of units, with a focus on those in underutilized communities. This allows voucher holders to make informed housing decisions that could offer better social amenities, as well as improved educational and economic opportunities for their families. Furthermore, participants are provided information about fair housing and anti-discrimination laws, and guidance on how to file complaints, ensuring families are well-informed about their rights and the resources available to them.

Fair Housing Goal: Ensuring Access to Safe and Sanitary Affordable Housing

Describe fair housing strategies and actions to achieve the goal:

The Housing Authority's annual and long-term objectives aim to expand housing options for families, enabling them to obtain housing that is appropriately sized and reduces overcrowding. All potential rental units are required to meet Housing Quality Standards, undergoing inspections before move-in and annual reviews to ensure ongoing compliance. Participants receive support in finding housing that suits their family's needs and in negotiating leases with landlords. By excluding blighted properties from federal housing subsidies, these measures enhance fair housing choices and contribute to the overall wellbeing of the community and its members.

Fair Housing Goal: Furthering Opportunities for Participants in Higher Opportunity Areas

Describe fair housing strategies and actions to achieve the goal:

The Housing Authority conducts an analysis of local fair market conditions in its jurisdiction to help eliminate barriers for applicants of the Housing Choice Voucher Program. With approval of the success rate Payment Standard amounts at the 50th percentile, the Housing Authority can increase the number of voucher holders who become participants. This adjustment also provides opportunities for participants to secure housing in neighborhoods and areas that offer higher opportunities, enhancing their access to better living conditions and resources.

Instructions for Preparation of Form HUD-50075-HCV Annual PHA Plan for HCV-Only PHAs

A. PHA Information. All PHAs must complete this section. (24 CFR §903.4)

A.1 Include the full **PHA Name**, **PHA Code**, **PHA Type**, **PHA Fiscal Year Beginning** (MM/YYYY), **Number of Housing Choice Vouchers (HCVs)**, **PHA Plan Submission Type**, and the **Availability of Information**, specific location(s) of all information relevant to the public hearing and proposed PHA Plan.

PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table. (24 CFR §943.128(a))

B. Plan Elements. All PHAs must complete this section. (24 CFR §903.11(c)(3))

B.1 Revision of Existing PHA Plan Elements. PHAs must:

Identify specifically which plan elements listed below that have been revised by the PHA. To specify which elements have been revised, mark the “yes” box. If an element has not been revised, mark “no.”

Statement of Housing Needs and Strategy for Addressing Housing Needs. Provide a statement addressing the housing needs of low-income, very low-income and extremely low-income families and a brief description of the PHA’s strategy for addressing the housing needs of families who reside in the jurisdiction served by the PHA and other families who are on the Section 8 tenant-based assistance waiting lists. The statement must identify the housing needs of (i) families with incomes below 30 percent of area median income (extremely low-income); (ii) elderly families (iii) households with individuals with disabilities, and households of various races and ethnic groups residing in the jurisdiction or on the public housing and Section 8 tenant-based assistance waiting lists. The statement of housing needs shall be based on information provided by the applicable Consolidated Plan, information provided by HUD, and generally available data. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. Once the PHA has submitted an Assessment of Fair Housing (AFH), which includes an assessment of disproportionate housing needs in accordance with 24 CFR 5.154(d)(2)(iv), information on households with individuals with disabilities and households of various races and ethnic groups residing in the jurisdiction or on the waiting lists no longer needs to be included in the Statement of Housing Needs and Strategy for Addressing Housing Needs. (24 CFR § 903.7(a)).

The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. (24 CFR §903.7(a)(2)(i)) Provide a description of the ways in which the PHA intends, to the maximum extent practicable, to address those housing needs in the upcoming year and the PHA’s reasons for choosing its strategy. (24 CFR §903.7(a)(2)(ii))

Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions. A statement of the PHA’s policies that govern resident or tenant eligibility, selection and admission including admission preferences for HCV. (24 CFR §903.7(b))

Financial Resources. A statement of financial resources, including a listing by general categories, of the PHA’s anticipated resources, such as PHA HCV funding and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources. (24 CFR §903.7(c))

Rent Determination. A statement of the policies of the PHA governing rental contributions of families receiving tenant-based assistance, discretionary minimum tenant rents, and payment standard policies. (24 CFR §903.7(d))

Operation and Management. A statement that includes a description of PHA management organization, and a listing of the programs administered by the PHA. (24 CFR §903.7(e)).

Informal Review and Hearing Procedures. A description of the informal hearing and review procedures that the PHA makes available to its applicants. (24 CFR §903.7(f))

Homeownership Programs. A statement describing any homeownership programs (including project number and unit count) administered by the agency under section 8y of the 1937 Act, or for which the PHA has applied or will apply for approval. (24 CFR §903.7(k))

Self Sufficiency Programs and Treatment of Income Changes Resulting from Welfare Program Requirements. A description of any PHA programs relating to services and amenities coordinated, promoted, or provided by the PHA for assisted families, including those resulting from the PHA’s partnership with other entities, for the enhancement of the economic and social self-sufficiency of assisted families, including programs provided or offered as a result of the PHA’s partnerships with other entities, and activities subject to Section 3 of the Housing and Community Development Act of 1968 (24 CFR Part 135) and under requirements for the Family Self-Sufficiency Program and others. Include the program’s size (including required and actual size of the FSS program) and means of allocating assistance to households. (24 CFR §903.7(l)(i)) Describe how the PHA will comply with the requirements of section 12(c) and (d) of the 1937 Act that relate to treatment of income changes resulting from welfare program requirements. (24 CFR §903.7(l)(iii)).

Substantial Deviation. PHA must provide its criteria for determining a “substantial deviation” to its 5-Year Plan. (24 CFR §903.7(r)(2)(i))

Significant Amendment/Modification. PHA must provide its criteria for determining a “Significant Amendment or Modification” to its 5-Year and Annual Plan.

If any boxes are marked “yes”, describe the revision(s) to those element(s) in the space provided.

- B.2 New Activities.** This section refers to new capital activities which is not applicable for HCV-Only PHAs.
- B.3 Progress Report.** For all Annual Plans following submission of the first Annual Plan, a PHA must include a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year PHA Plan. (24 CFR §903.11(c)(3), 24 CFR §903.7(r)(1))
- B.4 Capital Improvements.** This section refers to PHAs that receive funding from the Capital Fund Program (CFP) which is not applicable for HCV-Only PHAs
- B.5 Most Recent Fiscal Year Audit.** If the results of the most recent fiscal year audit for the PHA included any findings, mark “yes” and describe those findings in the space provided. (24 CFR §903.7(p))

C. Other Document and/or Certification Requirements.

- C.1 Resident Advisory Board (RAB) comments.** If the RAB had comments on the annual plan, mark “yes,” submit the comments as an attachment to the Plan and describe the analysis of the comments and the PHA’s decision made on these recommendations. (24 CFR §903.13(c), 24 CFR §903.19)
- C.2 Certification by State of Local Officials.** Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan. (24 CFR §903.15). Note: A PHA may request to change its fiscal year to better coordinate its planning with planning done under the Consolidated Plan process by State or local officials as applicable.
- C.3 Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.** Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed*. Form HUD-50077-ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed* must be submitted by the PHA as an electronic attachment to the PHA Plan. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the certification requirement to affirmatively further fair housing if the PHA fulfills the requirements of §§ 903.7(o)(1) and 903.15(d) and: (i) examines its programs or proposed programs; (ii) identifies any fair housing issues and contributing factors within those programs, in accordance with 24 CFR 5.154; or 24 CFR 5.160(a)(3) as applicable (iii) specifies actions and strategies designed to address contributing factors, related fair housing issues, and goals in the applicable Assessment of Fair Housing consistent with 24 CFR 5.154 in a reasonable manner in view of the resources available; (iv) works with jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; (v) operates programs in a manner consistent with any applicable consolidated plan under 24 CFR part 91, and with any order or agreement, to comply with the authorities specified in paragraph (o)(1) of this section; (vi) complies with any contribution or consultation requirement with respect to any applicable AFH, in accordance with 24 CFR 5.150 through 5.180; (vii) maintains records reflecting these analyses, actions, and the results of these actions; and (viii) takes steps acceptable to HUD to remedy known fair housing or civil rights violations. impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction’s initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. (24 CFR §903.7(o)).
- C.4 Challenged Elements.** If any element of the Annual PHA Plan or 5-Year PHA Plan is challenged, a PHA must include such information as an attachment to the Annual PHA Plan or 5-Year PHA Plan with a description of any challenges to Plan elements, the source of the challenge, and the PHA’s response to the public.

D. Affirmatively Furthering Fair Housing (AFFH).

D.1 Affirmatively Furthering Fair Housing. The PHA will use the answer blocks in item D.1 to provide a statement of its strategies and actions to implement each fair housing goal outlined in its accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5) that states, in relevant part: “To implement goals and priorities in an AFH, strategies and actions shall be included in program participants’ ... PHA Plans (including any plans incorporated therein) Strategies and actions must affirmatively further fair housing” Use the chart provided to specify each fair housing goal from the PHA’s AFH for which the PHA is the responsible program participant – whether the AFH was prepared solely by the PHA, jointly with one or more other PHAs, or in collaboration with a state or local jurisdiction – and specify the fair housing strategies and actions to be implemented by the PHA during the period covered by this PHA Plan. If there are more than three fair housing goals, add answer blocks as necessary.

Until such time as the PHA is required to submit an AFH, the PHA will not have to complete section D., nevertheless, the PHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015, which means that it examines its own programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction’s initiatives to affirmatively further fair housing that require the PHA’s involvement; and maintain records reflecting these analyses and actions. Furthermore, under Section 5A(d)(15) of the U.S. Housing Act of 1937, as amended, a PHA must submit a civil rights certification with its Annual PHA Plan, which is described at 24 CFR 903.7(o)(1) except for qualified PHAs who submit the Form HUD-50077-CR as a standalone document.

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the Annual PHA Plan. The Annual PHA Plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA’s operations, programs, and services, and informs HUD, families served by the PHA, and members of the public for serving the needs of low- income, very low- income, and extremely low- income families.

Public reporting burden for this information collection is estimated to average 6.02 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality



DISCUSSION

Formation of four (4) Ad hoc Committees and temporary suspension of HACM Committee Meetings.

MEMORANDUM

TO: Board of Commissioners

THRU: Zulieka Boykin
Executive Director/CEO

FROM: James Maynard-Cabrera
Director of Human Resources

RE: **Human Resources Report**

DATE: February 23, 2024



JANUARY EMPLOYEE SPOTLIGHT: Amparo Ambriz

Amparo has emerged as an invaluable asset to our company, especially in the Maintenance department. Since joining our team, Amparo has showcased exceptional proficiency and dedication, immediately impacting our operations positively. His unwavering commitment to excellence and adept problem-solving skills have significantly elevated the overall performance of the Maintenance team. Amparo's proactive approach and swift resolution of challenges have not only boosted our productivity but also upheld the high standards we champion at HACM. We are privileged to have such a dedicated and impactful team member like Amparo contributing to our organization's success.

FEBRUARY EMPLOYEE SPOTLIGHT: Beatriz Hernandez

Beatriz has become an indispensable asset to our company, notably in the Finance department, where her influence has been swift and substantial. Recognized for her exceptional honesty and transparency, Beatriz is a pleasure to work with, consistently challenging conventional approaches to find more efficient solutions. Her leadership during the BDO transition has been exemplary, ensuring a seamless process that enabled us to close two months without missing our board deadline for financial reporting. Beatriz's dedication and innovative mindset continue to instigate positive change within our team.

February Highlights:

- Safety Training:
We have continued our focus on safety training initiatives, ensuring all employees are equipped with the necessary knowledge and skills to ensure a safe work environment. All employees that were assigned the training have either completed all required training or have it near completion.
- Navien Maintenance Training:
Our Maintenance team underwent a refresher course on the ever-evolving tankless water heaters. A representative from Navien conducted a comprehensive 2-hour training session at HACM. We plan to collaborate further with Navien to conduct additional in-person training sessions on other products throughout the year.
- Pay for Performance Committee Meeting:
The Pay for Performance Committee convened earlier this month to deliberate on strategies for aligning employee performance with compensation, ensuring fairness and transparency in our

reward system. The committee plans to continue to the conversation and dive deeper into the intricacies within this initiative.

- Employee Engagement Survey Recap with Management Team:
We conducted a thorough recap of the employee engagement survey with the management team, analyzing feedback and identifying actionable insights to enhance employee satisfaction and organizational effectiveness.

III. RECRUITMENT & STAFFING UPDATES

- a. Vacant Positions/Active Recruitments (3)
 - Director of Housing Management
 - Director of Development
 - Housing Development Project Manager (*Candidate Selected*)
- b. New Arrivals/Internal Promotions/Lateral Transfers (6)
 - Jonathan Campbell, Director of Housing Programs
 - Diana Ruiz, Interim Director Housing Programs → Housing Programs Supervisor
 - Nora Ruvalcaba, Housing Program Analyst → Interim Director of Development
 - Jorge Camacho, Housing Development Analyst
 - Liz Ibarra, Temp. Office Assistant – Procurement/Finance
 - Jane Infante, Temp. Office Assistant – Development
- c. Temporary Employees (1)
 - Brian Guevara - Office Assistant – Section 8

IV. WORKPLACE SAFETY ISSUES - Workers’ Comp Reportable Injuries

CHANGES COMING SOON: A revised W/C will be available in March’s HR Board Report

- a. New Claims
 - 0
- b. Closed Claims
 - 0
- c. Chart of Open Claims:

Department	# of Claims
Housing Programs	4
Property Management	7
Maintenance	8
Human Resources	1
Finance	4
TOTAL	24

- d. Total Open Claims
 - 24

V. EMPLOYEE RELATIONS CLAIMS – Reported Legal Issues

- a. New Claims - 0

MEMORANDUM

TO: Board of Commissioners
THROUGH: Zulieka Boykin, Executive Director
FROM: Mike Underwood, Director of Finance
RE: Status Report: Finance Report for December 2023
DATE: February 12, 2024



Highlights:

- **HACM/ HDC – Non-Quarterly Financial Reports**
 - Voucher Funding and HCV Payments
 - Department Transactional Statistics
 - Revenue Sources by Property
 - Balance Sheets – HACM / HDC
 - Budget Comparisons – HACM / Voucher Program / HDC
 - 12 Month Income Statement Reports – HACM / Voucher Program / HDC

Finance Operational Update

Audits continue to be a key focus for staff. The following is a summary of activity:

- MCHI for 2021 - completed
- HACM 2022 - completed
- King City 2022 - completed
- Tynan 2022 - completed
- 1 Parkside 2022 - completed
- HACM 2023 - in progress
- FLC 23 and PDM 23 - completed

Quarterly reporting cycle completed for period ending December.

SmartSheet is a tool that allows for project management and tracking of various deliverables. Finance will be implementing the Corporate Calendar function in the next two months. This tool will allow all departments to track progress and due dates for the purpose of project management.

Rent Café and PayScan will be implemented in the coming months. Rent Café allows tenants to pay electronically and PayScan is an AP system that is based on paperless processing. Both will be more efficient methods than current practice.

Significant progress has been made with our banks to update the current signers. The Finance Director has spent considerable time working with our banking partners to update all our accounts which total over one hundred and fifty. This project will insure all accounts requiring interest bearing accounts and collateralization will be in place soon.

Procurement has published Requests for Proposal for our legal services, landscaping services and general contractor services. We are emphasizing compliance with our procurement policies. This includes updating contract listings and confirming all purchases are routed through the Procurement Department so that signature authorization requirements are adhered to by all employees authorized to initiate purchase activity. Current policies were reissued to all management in January.

HACM performance for December:

- December revenue was \$6.6M or \$1.2M favorable to budget
- YTD revenue was \$39.2M or \$6.9M favorable to budget

- Monthly operating expenses were \$6.6M or \$1.2M unfavorable to budget
- YTD operating expenses were \$36.7M or \$4.1M unfavorable to budget

- December bottom line was a loss of (\$45K) or basically on budget
- YTD surplus was \$2.5M or \$2.8M favorable

- Summary - December results for surplus were slightly favorable to budget. YTD surplus was \$2.5M positive and \$2.8M favorable to budget.

HDC performance for December:

- Revenue for the month was \$.27M or \$.23M below budget...timing related
- YTD revenue was \$1.44M or \$1.53M unfavorable

- Monthly operating expenses were \$.23M or breakeven to budget
- YTD operating expenses were \$1.06M or \$.24M favorable to budget

- December surplus was \$.55M or favorable \$.34M to budget
- YTD deficit was breakeven or unfavorable \$1.31M to budget

- Summary – December results for net income were favorable due to interest income. YTD bottom-line was breakeven unfavorable \$1.31M to budget.

Total December bottom-line was \$.5M positive for combined entities. Budget is \$.15M gain. Favorable \$.35M. YTD entity surplus \$2.5M. Budget is \$1M or favorable \$1.5M.

Board Action: Information only.

Voucher Funding and HCV Payments

	23-Oct	30-Nov	30-Dec	Total
HUD Grant - HAP Payments	\$ 5,121,417	\$ 7,855,345	\$ 5,540,822	\$ 18,517,584
Total Housing Assistance Payments	\$ 5,263,378	\$ 5,447,210	\$ 5,987,283	\$ 16,697,871

Finance Transactional Statistics - Dec 2023	HCV		AP		TOTALS	
	Transactions	Amounts	Transactions	Amounts	Transactions	Amounts
Receipts	84	5,452	2527	1,493,767	2611	1,499,219
Charges	136	5,113	2043	1,441,796	2179	1,446,909
Journal Entries	266	6,519,235	606	39,942,274	872	46,461,509
Payables	5193	6,181,358	967	1,676,476	6160	7,857,834
Checks	1369	6,127,888	136	1,501,887	1505	7,629,775
Transaction Amts Processed*	7048	\$ 18,839,046	6279	\$ 46,056,200	13327	\$ 64,895,246

REVENUE SOURCES BY PROPERTY

Dec-24

		Tenant Rental Revenue	Non Dwelling Rent	Subsidy	Type of Subsidy
440	Tynan Land Lease	0.00	5,184.51	0.00	Bakery / HDC Office Rental Income
		\$ -	\$ 5,184.51	\$ -	
205	Pueblo Del Mar	3,718.00	0.00	0.00	Grant Income
903	King City Migrant	0.00	0.00	0.00	OMS
		\$ 3,718.00	\$ -	\$ -	
204	Oak Grove	5,335.00	0.00	4,921.00	HCV
552	Single Family Homes	8,301.00	0.00	20,059.00	HCV
555	Casanova	52,660.00	0.00	127,672.00	HCV
934	Jardines	10,318.00	0.00	7,820.00	HCV
960	Rippling River	32,561.00	0.00	87,699.00	HCV
965	Tynan Affordable	203,400.00	12,887.92	146,052.00	HCV
973	Monterey Affordable	57,981.00	0.00	18,405.00	HCV
974	Benito Affordable	65,987.00	750.00	55,855.00	HCV
980	Fanoe Vista	36,582.00	0.00	72,196.00	HCV
985	Haciendas 1	44,049.00	0.00	57,120.00	HCV
986	Haciendas 2	41,992.00	0.00	54,586.00	HCV
988	Haciendas Senior	13,861.00	0.00	44,703.00	HCV
989	Haciendas 3	39,756.00	0.00	55,655.00	HCV
990	Oak Park !	59,767.00	0.00	53,972.00	HCV
991	Oak Park 2	55,902.00	1,400.00	43,967.00	HCV / USDA
		\$ 728,452.00	\$ 15,037.92	\$ 850,682.00	
212	Portola Vista	23,823.00	0.00	95,527.00	PBRA
214	Montecito Watson	8,978.00	0.00	4,195.00	PBRA
801	South County RAD	24,760.00	0.00	22,987.00	PBRA
802	Salinas Family RAD	121,997.00	0.00	56,082.00	PBRA
803	East Salinas Family RAD	161,235.00	0.00	48,904.00	PBRA
804	Gonzales Family RAD	25,927.00	0.00	7,192.00	PBRA
		\$ 366,720.00	\$ -	\$ 234,887.00	
992	One Parkside	31,955.00	0.00	108,770.00	PBV
		\$ 31,955.00	\$ -	\$ 108,770.00	
904	Chualar FLC	16,801.00	0.00	379.00	USDA
906	Salinas FLC	34,754.00	0.00	2,518.00	USDA
972	Benito FLC	76,270.00	0.00	18,186.00	USDA
984	Castroville FLC	58,791.05	0.00	43,689.00	USDA
		\$ 186,616.05	\$ -	\$ 64,772.00	
TOTAL		\$ 1,317,461.05	\$ 20,222.43	\$ 1,259,111.00	
		\$ -	\$ -	\$ -	

Housing Authority of the County of Monterey Balance Sheet (With Period Change)

Period = Dec 2023

	Balance	Beginning	Net
	Current Period	Balance	Change
ASSETS			
CURRENT ASSETS			
Cash:			
Cash - Unrestricted	5,490,349.04	4,703,971.41	786,377.63
Cash - Restricted	8,994,746.78	10,368,989.54	-1,374,242.76
Total Cash	14,485,095.82	15,072,960.95	-587,865.13
Accounts Receivable:			
Accounts Receivable - Tenants	920,953.04	922,936.09	-1,983.05
Accounts Receivable - Agency	-289,331.89	379,373.88	-668,705.77
Accounts Receivable - Other	2,431,956.13	2,206,636.93	225,319.20
Accrued Interest Receivable	15,088,126.49	14,577,989.70	510,136.79
Less: Allowance for Doubtful Accounts	-1,105,568.74	-1,091,136.96	-14,431.78
Total Receivables, Net of Allowance	17,046,135.03	16,995,799.64	50,335.39
Current Investments:			
Investments - Unrestricted	1,013,261.72	1,016,009.72	-2,748.00
Total Current Investments	1,013,261.72	1,016,009.72	-2,748.00
Prepaid Expenses	440,669.38	297,549.69	143,119.69
Inventories, Net of Obsolete Inventories	493,509.88	470,342.01	23,167.87
Interprogram - Due From	-899,467.01	-2,984,551.45	2,085,084.44
TOTAL CURRENT ASSETS	32,579,204.82	30,868,110.56	1,711,094.26
NONCURRENT ASSETS			
Capital Assets:			
Land	3,569,623.47	3,569,623.47	0.00
Buildings & Improvements	21,251,256.67	21,251,256.67	0.00
Site Improvements	5,825.41	5,825.41	0.00
Furniture & Equipment	816,018.40	752,579.73	63,438.67
Less: Depreciation	-14,263,119.72	-14,263,119.72	0.00
Total Capital Assets, Net of Depreciation	11,379,604.23	11,316,165.56	63,438.67
Construction In Progress	265,624.48	0.00	265,624.48
Notes Receivable	72,428,614.14	72,428,614.14	0.00
Other Noncurrent Assets	11,567,425.44	11,567,425.44	0.00
Less: Accumulated Amortization	-556,908.92	-553,927.88	-2,981.04
TOTAL NONCURRENT ASSETS	95,084,359.37	94,758,277.26	326,082.11
TOTAL ASSETS	127,663,564.19	125,626,387.82	2,037,176.37

Housing Authority of the County of Monterey Balance Sheet (With Period Change)

Period = Dec 2023

	Balance	Beginning	Net
LIABILITIES & EQUITY			
LIABILITIES			
CURRENT LIABILITIES			
Accounts Payable:			
Accounts Payable - Vendors	-90,878.50	-262,439.60	171,561.10
Accounts Payable - Other	1,218,337.28	1,175,497.50	42,839.78
Accrued Wages/Taxes/Benefits Payable	674,493.14	629,624.92	44,868.22
Accrued Interest Payable	665,798.96	674,890.86	-9,091.90
Accounts Payable - Agency	2,401.61	28,602.83	-26,201.22
Tenant Security Deposits	102,780.19	102,903.84	-123.65
Total Accounts Payable	2,572,932.68	2,349,080.35	223,852.33
Deferred Revenues	140,396.51	120,536.38	19,860.13
Developer Fees Payable	30,000.00	30,000.00	0.00
FSS Escrows	344,383.65	459,266.22	-114,882.57
Other Current Liabilities	113,077.20	361,425.95	-248,348.75
TOTAL CURRENT LIABILITIES	3,200,790.04	3,320,308.90	-119,518.86
NONCURRENT LIABILITIES			
Long-Term Hard Debt	7,501,192.52	7,759,053.33	-257,860.81
Long-Term Subordinate Debt	-1,079,404.55	-1,079,404.55	0.00
Other Noncurrent Liabilities	714,325.00	714,325.00	0.00
TOTAL NONCURRENT LIABILITIES	7,136,112.97	7,393,973.78	-257,860.81
TOTAL LIABILITIES	10,336,903.01	10,714,282.68	-377,379.67
EQUITY/NET ASSETS:			
Equity/Net Assets at Prior Year-end	105,486,651.45	105,486,651.45	0.00
Current Year Retained Earnings	11,840,009.44	9,425,453.40	2,414,556.04
TOTAL LIABILITIES AND EQUITY	127,663,563.90	125,626,387.53	2,037,176.37

MONTEREY COUNTY HOUSING DEVELOPMENT CORP.
Balance Sheet (With Period Change)

Period = Dec 2023

	Balance	Beginning	Net
	Current Period	Balance	Change
ASSETS			
CURRENT ASSETS			
Cash:			
Cash - Unrestricted	2,312,621.29	1,400,875.81	911,745.48
Cash - Restricted	1,436,150.47	1,408,474.53	27,675.94
Total Cash	3,748,771.76	2,809,350.34	939,421.42
Accounts Receivable:			
Accounts Receivable - Tenants	72,981.85	53,599.78	19,382.07
Accounts Receivable - Agency	174,276.00	132,693.00	41,583.00
Accounts Receivable - Developer Fees	4,067,186.22	4,139,436.22	-72,250.00
Accounts Receivable - Other	1,244,126.15	1,321,010.82	-76,884.67
Accrued Interest Receivable	3,147,535.78	2,930,242.85	217,292.93
Less: Allowance for Doubtful Accounts	-7,406.00	-7,406.00	0.00
Total Receivables, Net of Allowance	8,698,700.00	8,569,576.67	129,123.33
Prepaid Expenses	220,350.44	151,957.66	68,392.78
Interprogram - Due From	3,879,756.97	5,014,428.26	-1,134,671.29
TOTAL CURRENT ASSETS	16,547,579.17	16,545,312.93	2,266.24
NONCURRENT ASSETS			
Capital Assets:			
Land	5,009,826.00	5,009,826.00	0.00
Buildings & Improvements	13,904,855.80	13,904,855.80	0.00
Site Improvements	1,215.89	1,215.89	0.00
Furniture & Equipment	19,947.46	19,947.46	0.00
Less: Depreciation	-964,090.37	-964,090.37	0.00
Total Capital Assets, Net of Depreciation	17,971,754.78	17,971,754.78	0.00
Construction In Progress	13,955,785.61	13,763,288.05	192,497.56
Notes Receivable	33,643,996.47	33,643,996.47	0.00
Other Noncurrent Assets	828,819.00	828,819.00	0.00
TOTAL NONCURRENT ASSETS	66,400,355.86	66,207,858.30	192,497.56
TOTAL ASSETS	82,947,935.03	82,753,171.23	194,763.80

LIABILITIES & EQUITY

LIABILITIES

MONTEREY COUNTY HOUSING DEVELOPMENT CORP.
Balance Sheet (With Period Change)

Period = Dec 2023

	Balance	Beginning	Net
CURRENT LIABILITIES			
Accounts Payable:			
Accounts Payable - Vendors	-70,172.66	-83,381.92	13,209.26
Accounts Payable - Other	117,019.10	130,029.24	-13,010.14
Accrued Wages/Taxes/Benefits Payable	175,430.35	175,430.35	0.00
Accrued Interest Payable	1,199,941.91	979,482.63	220,459.28
Tenant Security Deposits	109,346.94	103,530.00	5,816.94
Total Accounts Payable	1,531,565.64	1,305,090.30	226,475.34
Deferred Revenues	9,752,128.57	9,687,357.50	64,771.07
Developer Fees Payable	404,393.00	404,393.00	0.00
Other Current Liabilities	64,776.76	50,542.76	14,234.00
TOTAL CURRENT LIABILITIES	11,752,863.97	11,447,383.56	305,480.41
NONCURRENT LIABILITIES			
Long-Term Hard Debt	21,275,309.20	21,380,461.35	-105,152.15
Long-Term Subordinate Debt	13,272,250.00	13,272,250.00	0.00
Other Noncurrent Liabilities	-232,462.00	-232,462.00	0.00
TOTAL NONCURRENT LIABILITIES	34,315,097.20	34,420,249.35	-105,152.15
TOTAL LIABILITIES	46,067,961.17	45,867,632.91	200,328.26
EQUITY/NET ASSETS:			
Equity/Net Assets at Prior Year-end	33,129,057.56	33,129,057.56	0.00
Current Year Retained Earnings	3,750,916.30	3,756,480.76	-5,564.46
TOTAL LIABILITIES AND EQUITY	82,947,935.03	82,753,171.23	194,763.80

**Housing Authority of the County of Monterey
Income Statement**

Period = Jan 2023-Dec 2023

	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Total
REVENUE:													
Tenant Rents	95,912.75	96,525.75	98,850.75	94,237.00	89,047.00	92,607.00	118,734.50	116,101.00	104,594.50	115,287.00	98,214.00	93,409.00	1,213,520.25
Tenant Subsidies	98,398.00	97,477.00	98,377.00	104,978.00	101,198.00	98,581.71	123,624.00	106,600.00	104,390.00	106,347.00	107,350.00	107,540.00	1,254,860.71
Other Tenant Income	0.00	0.00	580.00	42.00	27,919.00	116,559.00	1,582.00	1,325.00	2,362.00	2,080.00	1,924.31	12,424.00	166,797.31
Total Tenant Revenue	194,310.75	194,002.75	197,807.75	199,257.00	218,164.00	307,747.71	243,940.50	224,026.00	211,346.50	223,714.00	207,488.31	213,373.00	2,635,178.27
HUD Operating Grants	45,165.00	153,641.00	45,873.00	0.00	0.00	-74,059.00	0.00	0.00	0.00	0.00	0.00	0.00	170,620.00
Section 8 HAP Subsidies	3,938,642.00	3,465,392.00	3,953,948.00	5,380,011.00	4,402,308.00	4,458,118.00	4,736,439.00	4,434,895.00	5,121,417.00	4,739,245.00	7,855,345.00	5,540,822.00	58,026,582.00
Section 8 Administrative Fees	342,682.00	915,466.00	342,735.00	341,701.00	341,947.00	257,707.00	371,151.00	499,093.00	726,685.87	632,259.72	422,816.95	390,661.35	5,584,905.89
Operating Grants (Non-HUD)	22,811.89	20,683.72	93,486.54	22,961.26	42,140.55	68,664.72	0.00	0.00	0.00	0.00	0.00	0.00	270,748.68
Other Income	232,411.22	197,912.84	194,295.74	171,723.80	146,235.12	325,812.54	313,154.26	195,400.80	191,248.33	267,024.42	179,586.35	181,396.23	2,596,201.65
Interest Income	146,941.64	136,194.56	144,570.81	140,928.40	111,027.85	576,332.29	177,132.47	165,927.41	132,209.04	147,619.55	132,188.56	273,568.44	2,284,641.02
Total Revenue	4,922,964.50	5,083,292.87	4,972,716.84	6,256,582.46	5,261,822.52	5,920,323.26	5,841,817.23	5,519,342.21	6,382,906.74	6,009,862.69	8,797,425.17	6,599,821.02	71,568,877.51
EXPENSES:													
Administrative	527,456.82	513,711.02	500,858.92	532,923.88	501,858.83	732,085.01	539,712.48	516,661.77	462,796.85	463,406.21	674,355.24	617,061.56	6,582,888.59
Administrative Fees	16,513.09	16,513.09	16,579.09	16,513.09	16,513.09	22,599.09	18,096.09	17,305.09	18,953.09	18,162.09	18,162.09	18,162.09	214,071.08
Tenant Services	52,447.22	91,241.98	64,036.63	80,421.37	68,596.26	91,843.88	88,450.14	136,466.24	61,521.62	125,034.40	93,717.36	33,384.14	987,161.24
Utilities	38,040.62	32,728.01	23,387.82	41,617.19	28,948.86	29,346.00	45,146.95	58,827.33	47,161.21	60,278.57	28,656.09	48,065.80	482,204.45
Maintenance	170,401.00	134,528.80	117,762.71	108,326.93	113,514.89	655,428.93	208,829.44	110,461.06	135,013.69	129,602.54	134,342.90	140,498.06	2,158,710.95
Protective Services	3,853.85	783.00	0.00	993.00	0.00	5,893.35	11,721.00	12,162.68	10,200.00	7,971.00	0.00	4,200.00	57,777.88
Insurance	25,921.52	25,872.89	25,537.28	26,785.61	26,335.87	33,975.98	23,831.45	16,120.61	15,264.11	19,410.86	41,126.08	20,569.41	300,751.67
Other General Expenses	30,578.68	30,635.17	105,937.14	31,094.67	17,874.75	-534,035.41	37,735.96	30,762.67	34,325.43	42,334.60	30,913.67	33,058.35	-108,784.32
Payments in Lieu of Taxes	0.00	6,000.00	2,152.18	0.00	468.00	0.00	82,946.23	0.00	289.07	0.00	-45,029.13	12,912.19	59,738.60
Bad Debts	0.00	0.00	0.00	0.00	0.00	2,826.00	0.00	0.00	0.00	0.00	3,038.00	0.00	5,864.00
Housing Assistance Payments	4,158,619.67	4,577,193.89	4,295,810.86	4,509,775.59	4,539,404.83	4,703,393.85	4,661,345.49	4,907,308.19	5,086,109.18	5,173,600.61	5,432,274.74	5,688,344.61	57,733,181.51
FSS Escrows	18,154.00	17,866.00	18,271.00	19,152.00	18,826.00	17,177.00	15,126.00	16,001.00	15,440.00	14,781.00	14,935.00	14,871.00	200,600.00
Total Operating Expenses	5,041,986.47	5,447,073.85	5,170,333.63	5,367,603.33	5,332,341.44	5,760,533.68	5,732,941.23	5,822,076.64	5,887,074.25	6,054,581.88	6,426,492.04	6,631,127.21	68,674,165.65
Interest Expense	54,472.94	13,729.98	14,100.39	13,947.75	14,056.46	13,903.77	54,362.36	-1,028.33	13,894.27	13,863.06	14,109.29	13,900.62	233,312.56
Extraordinary Maintenance	0.00	0.00	6,800.00	0.00	10,800.00	14,200.00	0.00	0.00	0.00	0.00	0.00	0.00	31,800.00
Casualty Losses - Non-Capitalized	0.00	0.00	0.00	0.00	0.00	0.00	5,702.22	0.00	0.00	0.00	0.00	0.00	5,702.22
Depreciation Expense	0.00	0.00	0.00	0.00	0.00	537,477.23	0.00	0.00	0.00	0.00	0.00	0.00	537,477.23
Amortization Exp	496.84	496.84	496.84	496.84	496.84	36,234.12	496.84	496.84	496.84	496.84	496.84	496.84	41,699.36
NET INCOME	-173,991.75	-378,007.80	-219,014.02	874,534.54	-95,872.22	-442,025.54	48,314.58	-302,202.94	481,441.38	-59,079.09	2,356,327.00	-45,703.65	2,044,720.49

**VOUCHER PROGRAM ONLY
Income Statement**

Period = Jan 2023-Dec 2023

	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Total
REVENUE:													
Tenant Subsidies	0.00	0.00	0.00	0.00	0.00	-1,110.17	0.00	0.00	0.00	0.00	0.00	0.00	-1,110.17
Other Tenant Income	0.00	0.00	0.00	0.00	25.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	25.00
Total Tenant Revenue	0.00	0.00	0.00	0.00	25.00	-1,110.17	0.00	0.00	0.00	0.00	0.00	0.00	-1,085.17
Section 8 HAP Subsidies	3,938,642.00	3,465,392.00	3,953,948.00	5,380,011.00	4,402,308.00	4,458,118.00	4,736,439.00	4,434,895.00	5,121,417.00	4,739,245.00	7,855,345.00	5,540,822.00	58,026,582.00
Section 8 Administrative Fees	342,682.00	915,466.00	342,735.00	341,701.00	341,947.00	257,707.00	371,151.00	499,093.00	726,685.87	632,259.72	422,816.95	390,661.35	5,584,905.89
Other Income	9,658.33	11,349.20	12,863.98	0.00	0.00	0.00	0.00	0.00	0.00	70,990.63	0.00	0.00	104,862.14
Interest Income	48.01	42.01	46.50	42.01	49.51	42.94	46.51	46.51	43.51	48.02	0.00	0.00	455.53
Total Revenue	4,291,030.34	4,392,249.21	4,309,593.48	5,721,754.01	4,744,329.51	4,714,757.77	5,107,636.51	4,934,034.51	5,848,146.38	5,442,543.37	8,278,161.95	5,931,483.35	63,715,720.39
EXPENSES:													
Administrative	241,569.19	196,536.84	217,766.80	216,445.45	225,483.52	344,204.35	252,724.27	210,033.69	221,142.88	214,624.31	316,808.59	265,985.80	2,923,325.69
Tenant Services	40,353.89	79,099.15	51,270.52	68,328.04	68,596.26	79,750.55	76,356.77	136,466.24	61,521.62	125,034.40	93,717.36	33,384.14	913,878.94
Maintenance	626.62	550.62	804.61	597.50	1,895.21	697.71	933.26	917.22	866.66	1,099.23	389.49	969.68	10,347.81
Insurance	10,063.65	10,157.12	10,106.22	10,706.56	10,223.89	12,747.35	4,761.05	4,847.23	4,675.79	7,937.58	10,528.98	5,045.72	101,801.14
Other General Expenses	0.00	0.00	0.00	0.00	0.00	-578,350.00	0.00	0.00	1,417.50	0.00	151.00	2,295.68	-574,485.82
Housing Assistance Payments	4,248,990.67	4,685,752.89	4,404,139.86	4,637,061.59	4,675,391.83	4,849,682.85	4,801,592.49	5,084,704.19	5,269,946.18	5,372,603.61	5,639,808.74	5,987,282.61	59,656,957.51
FSS Escrows	18,154.00	17,866.00	18,271.00	19,152.00	18,826.00	17,177.00	15,126.00	16,001.00	15,440.00	14,781.00	14,935.00	14,930.00	200,659.00
Total Operating Expenses	4,559,758.02	4,989,962.62	4,702,359.01	4,952,291.14	5,000,416.71	4,725,909.81	5,151,493.84	5,452,969.57	5,575,010.63	5,736,080.13	6,076,339.16	6,309,893.63	63,232,484.27
NET INCOME	-268,727.68	-597,713.41	-392,765.53	769,462.87	-256,087.20	-11,152.04	-43,857.33	-518,935.06	273,135.75	-293,536.76	2,201,822.79	-378,410.28	483,236.12

**Monterey County Housing Development Corporation
Income Statement**

Period = Jan 2023-Dec 2023

	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Total
REVENUE:													
Tenant Rents	45,609.00	49,441.00	48,772.00	50,752.00	52,447.00	55,956.00	55,327.00	56,218.00	56,829.00	58,931.00	58,631.00	60,961.00	649,874.00
Tenant Subsidies	101,015.00	99,698.00	97,735.00	97,558.00	101,920.00	103,899.00	102,772.00	104,113.00	102,655.00	141,740.00	137,783.00	147,731.00	1,338,619.00
Other Tenant Income	622.00	612.00	656.00	1,505.00	588.00	656.00	564.00	1,183.00	564.00	634.00	6,027.22	468.00	14,079.22
Total Tenant Revenue	147,246.00	149,751.00	147,163.00	149,815.00	154,955.00	160,511.00	158,663.00	161,514.00	160,048.00	201,305.00	202,441.22	209,160.00	2,002,572.22
Other Income	355,646.15	5,639.50	12,139.20	6,022.20	5,555.50	151,539.67	5,582.46	5,912.44	5,158.18	16,964.13	5,652.42	96,351.17	672,163.02
Interest Income	51,301.58	48,466.63	50,962.53	58,734.05	52,084.88	50,189.74	50,098.12	50,111.99	49,166.86	50,113.03	50,111.27	-36,663.22	524,677.46
Total Revenue	554,193.73	203,857.13	210,264.73	214,571.25	212,595.38	362,240.41	214,343.58	217,538.43	214,373.04	268,382.16	258,204.91	268,847.95	3,199,412.70
EXPENSES:													
Administrative	104,237.22	106,934.49	103,191.71	149,626.95	172,303.82	100,692.51	107,035.05	77,918.16	76,501.04	75,430.34	75,784.20	126,651.70	1,276,307.19
Administrative Fees	17,588.58	17,701.26	17,695.06	17,749.40	18,100.94	25,677.38	18,880.67	21,016.88	21,009.62	24,345.87	21,100.96	21,561.17	242,427.79
Tenant Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	530.09	0.00	0.00	0.00	0.00	530.09
Utilities	18,155.76	25,759.41	11,519.68	24,771.32	12,192.06	21,314.73	15,268.28	24,311.68	17,392.59	17,176.47	20,888.72	26,094.09	234,844.79
Maintenance	42,408.17	51,365.32	16,341.65	19,526.55	23,031.46	17,403.89	33,710.25	50,242.24	18,659.21	19,254.95	36,133.19	40,725.26	368,802.14
Protective Services	847.50	0.00	0.00	210.00	0.00	1,346.61	592.50	0.00	0.00	592.50	0.00	0.00	3,589.11
Insurance	11,738.72	12,022.73	11,368.53	10,786.02	10,954.26	56,129.50	2,891.49	2,280.14	23,076.93	2,241.41	24,162.94	13,391.84	181,044.51
Other General Expenses	15.94	0.00	0.00	6,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6,015.94
Payments in Lieu of Taxes	0.00	12,800.00	321.05	0.00	5,927.02	0.00	976.38	0.00	0.00	200.00	2,691.99	0.00	22,916.44
Total Operating Expenses	194,991.89	226,583.21	160,437.68	228,670.24	242,509.56	222,564.62	179,354.62	176,299.19	156,639.39	139,241.54	180,762.00	228,424.06	2,336,478.00
Interest Expense	61,980.18	59,504.44	60,509.86	59,501.45	645,410.02	-497,366.93	213,414.90	62,610.89	62,517.68	61,687.80	484,290.28	-511,862.60	762,197.97
Extraordinary Maintenance	1,330.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,330.06
Casualty Losses - Non-Capitalized	0.00	0.00	10,690.00	0.00	0.00	0.00	74.78	0.00	0.00	0.00	13,800.00	0.00	24,564.78
Depreciation Expense	9,010.44	9,010.44	9,010.44	9,010.44	9,010.44	23,345.69	0.00	0.00	0.00	0.00	0.00	0.00	68,397.89
NET INCOME	286,881.16	-91,240.96	-30,383.25	-82,610.88	-684,334.64	613,697.03	-178,500.72	-21,371.65	-4,784.03	67,452.82	-420,647.37	552,286.49	6,444.00

Housing Authority of the County of Monterey Budget Comparison

Period = Jul 2023-Dec 2023

	YTD Actual	YTD Budget	Variance
REVENUE:			
Tenant Rents	646,340.00	720,011.46	-73,671.46
Tenant Subsidies	655,851.00	639,238.02	16,612.98
Other Tenant Income	21,697.31	9,889.98	11,807.33
Total Tenant Revenue	1,323,888.31	1,369,139.46	-45,251.15
HUD Operating Grants	0.00	187,981.02	-187,981.02
Section 8 HAP Subsidies	32,428,163.00	26,065,603.02	6,362,559.98
Section 8 Administrative Fees	3,042,667.89	2,225,328.00	817,339.89
Operating Grants (Non-HUD)	0.00	272,880.00	-272,880.00
Other Income	1,327,810.39	1,174,864.44	152,945.95
Interest Income	1,028,645.47	948,084.00	80,561.47
Total Revenue	39,151,175.06	32,243,879.94	6,907,295.12
EXPENSES:			
Administrative	3,273,994.11	3,370,885.32	96,891.21
Administrative Fees	108,840.54	107,739.48	-1,101.06
Tenant Services	538,573.90	365,268.00	-173,305.90
Utilities	288,135.95	229,116.60	-59,019.35
Maintenance	858,747.69	1,462,710.48	603,962.79
Protective Services	46,254.68	5,232.00	-41,022.68
Insurance	136,322.52	196,009.44	59,686.92
Other General Expenses	209,130.68	430,769.02	221,638.34
Payments in Lieu of Taxes	51,118.36	43,248.00	-7,870.36
Bad Debts	3,038.00	0.00	-3,038.00
Housing Assistance Payments	30,948,982.82	25,940,602.92	-5,008,379.90
FSS Escrows	91,154.00	124,999.98	33,845.98
Total Operating Expenses	36,554,293.25	32,276,581.24	-4,277,712.01
Interest Expense	109,101.27	239,286.00	130,184.73
Extraordinary Maintenance	0.00	12,277.98	12,277.98
Casualty Losses - Non-Capitalized	5,702.22	0.00	-5,702.22
Depreciation Expense	0.00	0.00	0.00
Amortization Exp	2,981.04	0.00	-2,981.04
NET INCOME	2,479,097.28	-284,265.28	2,763,362.56

VOUCHER PROGRAM ONLY Budget Comparison

Period = Jul 2023-Dec 2023

	YTD Actual	YTD Budget	Variance
REVENUE:			
Section 8 HAP Subsidies	32,428,163.00	26,065,603.02	6,362,559.98
Section 8 Administrative Fees	3,042,667.89	2,225,328.00	817,339.89
Other Income	70,990.63	0.00	70,990.63
Interest Income	184.55	0.00	184.55
Total Revenue	35,542,006.07	28,290,931.02	7,251,075.05
EXPENSES:			
Administrative	1,481,319.54	1,431,319.80	-49,999.74
Tenant Services	526,480.53	289,080.00	-237,400.53
Maintenance	5,175.54	2,499.96	-2,675.58
Insurance	37,796.35	64,779.96	26,983.61
Other General Expenses	3,864.18	4,100.02	235.84
Housing Assistance Payments	32,155,937.82	25,940,602.92	-6,215,334.90
FSS Escrows	91,213.00	124,999.98	33,786.98
Total Operating Expenses	34,301,786.96	27,857,382.64	-6,444,404.32
NET INCOME	1,240,219.11	433,548.38	806,670.73

MONTEREY COUNTY HOUSING DEVELOPMENT CORP.
Budget Comparison

Period = Jul 2023-Dec 2023

	YTD Actual	YTD Budget	Variance
REVENUE:			
Tenant Rents	346,897.00	930,384.00	-583,487.00
Tenant Subsidies	736,794.00	82,878.00	653,916.00
Other Tenant Income	9,440.22	3,396.00	6,044.22
Total Tenant Revenue	1,093,131.22	1,016,658.00	76,473.22
Other Income	135,620.80	1,691,436.00	-1,555,815.20
Interest Income	212,938.05	262,518.00	-49,579.95
Total Revenue	1,441,690.07	2,970,612.00	-1,528,921.93
EXPENSES:			
Administrative	539,320.49	654,978.00	115,657.51
Administrative Fees	127,915.17	143,196.00	15,280.83
Tenant Services	530.09	26,250.00	25,719.91
Utilities	121,131.83	189,810.00	68,678.17
Maintenance	198,725.10	207,096.00	8,370.90
Protective Services	1,185.00	1,656.00	471.00
Insurance	68,044.75	71,142.00	3,097.25
Other General Expenses	0.00	1,644.00	1,644.00
Payments in Lieu of Taxes	3,868.37	5,076.00	1,207.63
Total Operating Expenses	1,060,720.80	1,300,848.00	240,127.20
Interest Expense	372,658.95	299,142.00	-73,516.95
Casualty Losses - Non-Capitalized	13,874.78	0.00	-13,874.78
Depreciation Expense	0.00	69,102.00	69,102.00
NET INCOME	-5,564.46	1,301,520.00	-1,307,084.46

Housing Authority of the County of Monterey Monthly Budget Comparison

Period = Dec 2023

	PTD Actual	PTD Budget	Variance
REVENUE:			
Tenant Rents	93,409.00	120,001.91	-26,592.91
Tenant Subsidies	107,540.00	106,539.67	1,000.33
Other Tenant Income	12,424.00	1,648.33	10,775.67
Total Tenant Revenue	<u>213,373.00</u>	<u>228,189.91</u>	<u>-14,816.91</u>
HUD Operating Grants	0.00	31,330.17	-31,330.17
Section 8 HAP Subsidies	5,540,822.00	4,344,267.17	1,196,554.83
Section 8 Administrative Fees	390,661.35	370,888.00	19,773.35
Operating Grants (Non-HUD)	0.00	45,480.00	-45,480.00
Other Income	181,396.23	195,810.74	-14,414.51
Interest Income	273,568.44	158,014.00	115,554.44
Total Revenue	<u>6,599,821.02</u>	<u>5,373,979.99</u>	<u>1,225,841.03</u>
EXPENSES:			
Administrative	617,061.56	561,814.22	-55,247.34
Administrative Fees	18,162.09	17,956.58	-205.51
Tenant Services	33,384.14	60,878.00	27,493.86
Utilities	48,065.80	38,186.10	-9,879.70
Maintenance	140,498.06	243,785.08	103,287.02
Protective Services	4,200.00	872.00	-3,328.00
Insurance	20,569.41	32,668.24	12,098.83
Other General Expenses	33,058.35	88,461.49	55,403.14
Payments in Lieu of Taxes	12,912.19	7,208.00	-5,704.19
Bad Debts	0.00	0.00	0.00
Housing Assistance Payments	5,688,344.61	4,323,433.82	-1,364,910.79
FSS Escrows	14,871.00	20,833.33	5,962.33
Total Operating Expenses	<u>6,631,127.21</u>	<u>5,396,096.86</u>	<u>-1,235,030.35</u>
Interest Expense	13,900.62	39,881.00	25,980.38
Extraordinary Maintenance	0.00	2,046.33	2,046.33
Casualty Losses - Non-Capitalized	0.00	0.00	0.00
Depreciation Expense	0.00	0.00	0.00
Amortization Exp	496.84	0.00	-496.84
NET INCOME	<u>-45,703.65</u>	<u>-64,044.20</u>	<u>18,340.55</u>

VOUCHER PROGRAM ONLY Monthly Budget Comparison

Period = Dec 2023

	PTD Actual	PTD Budget	Variance
REVENUE:			
Section 8 HAP Subsidies	5,540,822.00	4,344,267.17	1,196,554.83
Section 8 Administrative Fees	390,661.35	370,888.00	19,773.35
Other Income	0.00	0.00	0.00
Interest Income	0.00	0.00	0.00
Total Revenue	5,931,483.35	4,715,155.17	1,216,328.18
EXPENSES:			
Administrative	265,985.80	238,553.30	-27,432.50
Tenant Services	33,384.14	48,180.00	14,795.86
Maintenance	969.68	416.66	-553.02
Insurance	5,045.72	10,796.66	5,750.94
Other General Expenses	2,295.68	983.33	-1,312.35
Housing Assistance Payments	5,987,282.61	4,323,433.82	-1,663,848.79
FSS Escrows	14,930.00	20,833.33	5,903.33
Total Operating Expenses	6,309,893.63	4,643,197.10	-1,666,696.53
NET INCOME	-378,410.28	71,958.07	-450,368.35

MONTEREY COUNTY HOUSING DEVELOPMENT CORP.
Monthly Budget Comparison

Period = Dec 2023

	PTD Actual	PTD Budget	Variance
REVENUE:			
Tenant Rents	60,961.00	155,064.00	-94,103.00
Tenant Subsidies	147,731.00	13,813.00	133,918.00
Other Tenant Income	468.00	566.00	-98.00
Total Tenant Revenue	209,160.00	169,443.00	39,717.00
Other Income	96,351.17	281,906.00	-185,554.83
Interest Income	-36,663.22	43,753.00	-80,416.22
Total Revenue	268,847.95	495,102.00	-226,254.05
EXPENSES:			
Administrative	126,651.70	109,163.00	-17,488.70
Administrative Fees	21,561.17	23,866.00	2,304.83
Tenant Services	0.00	4,375.00	4,375.00
Utilities	26,094.09	31,635.00	5,540.91
Maintenance	40,725.26	34,516.00	-6,209.26
Protective Services	0.00	276.00	276.00
Insurance	13,391.84	11,857.00	-1,534.84
Other General Expenses	0.00	274.00	274.00
Payments in Lieu of Taxes	0.00	846.00	846.00
Total Operating Expenses	228,424.06	216,808.00	-11,616.06
Interest Expense	-511,862.60	49,857.00	561,719.60
Casualty Losses - Non-Capitalized	0.00	0.00	0.00
Depreciation Expense	0.00	11,517.00	11,517.00
NET INCOME	552,286.49	216,920.00	335,366.49



MEMORANDUM

TO: Board of Commissioners
THRU: Zulieka Boykin Executive Director
FROM: Socorro Vasquez, Sandra Rosales and Ricardo Calderon
RE: **Property Management Report**
DATE: February 7, 2024

Goals:

Property management has met the following goals for the month of January:

- Submitted application for PDM program change to Health and Human Services
- Submitted file audit requests for RAD and FLC sites
- PM completed repairs to the playground at the Casentini site
- PM completed and submitted welfare exemptions
- PM has completed rent increase notifications to residents at the Castroville, Salinas and Chualar FLC sites
- Completed RFP for Pueblo Del Mar

Property management has the following goals for the month of February:

- Complete installation of computers at Casanova, Portola Vista, Casa de Oro and Los Ositos
- Complete training and implementation of Rent Café
- Complete selection of Contractor for the PDM rehab
- Coordinate completion of Organizational Clearance Certificate for Portola Vista
- Complete Tankless Water Heater training for maintenance staff
- Begin transition of Rippling River site to HACM

Property Updates:

- King City Migrant Center:
 - The rehabilitation at site continues as scheduled. Painting and repairs to decks and patios are pending weather permits. Installation of wall heaters to begin upon completion of deck and patio painting and repairs.
- RAD properties:
 - Sump pump at 44 Natividad has been repaired and is working. An additional pump will be installed upon delivery in March 2024.

- Haciendas 1-4:
 - Repairs to the decks for Haciendas I and II continue as scheduled as weather permits.
 - PM continues to gather replacement costs for the tankless water heaters at Haciendas 1 and 2. These water heaters have been in-place from 2012 and 2014 respectively and PM is recommending these units to be replaced.

- Portola Vista and Casanova:
 - The computer installation at the sites are in progress and installation will be completed by the end of the month.
 - Property management will be replacing the motor to the side gate at Casanova to determine if the FOB reader can be installed.
 - PM is pending the final proposal for replacement of the bay window at Portola Vista and will be completed upon selection of vendor.
 - Installation of 13 cameras has been completed at Casanova. Installation of cameras in the laundry room is in progress.
 - Residents continue to hold Sunday tea and bingo nights

- Pueblo Del Mar:
 - PM is working on relocating the remaining residents at PDM.
 - PM held pre-questionnaire meeting with potential vendors and conducted site walk of the property.
 - PM is pending estimates to replace re-weatherize lobby windows.

- Farm Labor (Salinas and Chualar):
 - Property management continues to work on the out-of-occupancy units at Salinas and Chualar FLC.

New Hires

- None

Evictions:

- 5 files sent to attorney for termination

Monthly Summary

Rent Collection

Property	Monthly Rent	monthly Rent Collected	Monthly Subsidy Collected	Collection Rate
Oakgrove	\$ 5,556.00	\$ 5,885.00	\$ 4706.00	100%
Pueblo Del Mar	\$ 2389.00	\$ 2389.00	\$ -	100%
Portola Vista	\$ 23,752.00	\$ 23,788.00	\$ 95,598.00	100%
Montecito Watson	\$ 9,029.00	\$ 9,263.00	\$ 4,148.00	100%
Homes	\$ 8,301.00	\$ 8,352.00	\$ 20,059.00	100%
Chualar FLC	\$ 16,801.00	\$ 16,020.00	\$ 379.00	95%
Salinas FLC	\$ 34,404.00	\$ 37,121.00	\$ 2,518.00	100%
King City Migrant	\$ -	\$ -	\$ -	100%
Jardines	\$ 10,318.00	\$ 10,581.00	\$ 7,820.00	100%
South County RAD	\$ 21,920.00	\$ 23,647.00	\$ 22,188.00	100%
Salinas Family RAD	\$ 112,923.00	\$ 110,907.00	\$ 53,751.00	98%
East Salinas Family RAD	\$ 157,947.00	\$ 156,758.00	\$ 49,043.00	99%
Gonzales Family RAD	\$ 25,772.00	\$ 26,114.00	\$ 7,454.00	87%
Casanova	\$ 47,854.00	\$ 42,935.00	\$ 134,759.00	89%
Castroville FLC	\$ 51,850.00	\$ 50,934.00	\$ 25,731.00	99%
Haciendas I	\$ 43,154.00	\$ 39,645.00	\$ 51,101.00	97%
Haciendas II	\$ 43,012.00	\$ 41,638.00	\$ 24,484.00	82%
Haciendas III	\$ 43,459.00	\$ 35,607.00	\$ 61,392.00	100%
Haciendas IV	\$ 12,507.00	\$ 13,389.00	\$ 46,437.00	100%
One Parkside	\$ 30,880.00	\$ 34,192.00	\$ 136,438.00	100%
	\$ 701,828.00	\$ 689,165.00	\$ 748,006.00	98%

Occupancy					
Property	Total Units	Current Occupied	Current Vacant	Occupancy Rate	Out of Occupancy
Oakgrove	5	5	0	100%	0
Pueblo Del Mar	56	4	0	7%	52
Portola Vista	64	63	1	98%	0
Montecito Watson	13	13	0	100%	0
Homes	9	9	0	100%	0
Chualar FLC	29	24	5	83%	3
Salinas FLC	57	53	4	93%	4
King City Migrant	83	2	0	0%	81
Jardines	11	11	0	100%	0
South County RAD	70	69	1	99%	0
Salinas Family RAD	170	168	2	99%	0
East Salinas Family RAD	202	198	4	99%	0
Gonzales Family RAD	30	29	1	97%	0
Casanova	86	83	3	97%	0
Castroville FLC	54	53	1	98%	0
Haciendas I	53	53	0	100%	0
Haciendas II	46	45	1	98%	0
Haciendas III	50	50	0	100%	0
Haciendas IV	41	40	1	98%	0
One Parkside	80	79	1	99%	0
	1209	1051	25	87%	140

Work Orders

Property	Forwarded WO	Created WO	Completed WO	Pending WO
Oakgrove	8	4	4	4
Pueblo Del Mar	2	4	1	5
Portola Vista	18	25	42	1
Montecito Watson	1	4	4	1
Homes	3	1	1	3
Chualar FLC	2	1	0	3
Salinas FLC	1	3	3	1
King City Migrant	3	0	0	3
Jardines	7	4	4	7
South County RAD	13	11	16	8
Salinas Family RAD	22	78	79	21
East Salinas Family RAD	43	67	62	48
Gonzales Family RAD	7	2	1	8
Casanova	11	36	40	7
Castroville FLC	52	18	19	51
Haciendas I	14	19	16	17
Haciendas II	8	27	26	9
Haciendas III	7	14	11	10
Haciendas IV	5	6	6	5
One Parkside	16	38	49	5
	243	362	384	217

Waiting Lists

Property	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	5 Bedroom
Oakgrove	0	299	0	0	0
Pueblo Del Mar	0	0	0	0	0
Portola Vista	77	0	0	0	0
Montecito Watson	0	120	0	0	0
Homes	0	0	10	0	0
Chualar FLC	0	19	114	27	0
Salinas FLC	0	66	81	22	0
King City Migrant	0	0	0	0	0
Jardines	0	0	73	0	0
South County RAD	501	0	0	0	0
Salinas Family RAD	319	332	297	63	0
East Salinas Family RAD	271	166	125	26	2
Gonzales Family RAD	633	287	386	125	34
Casanova	0	0	0	0	0
Castroville FLC	0	124	119	41	0
Haciendas I	689	924	407	99	0
Haciendas II	958	633	458	132	0
Haciendas III	353	323	309	0	0
Haciendas IV	0	0	0	0	0
One Parkside	0	0	0	0	0
	3801	3293	2379	535	36



One Parkside

Property Owner: Housing Authority County of Monterey
Property Management Company: Housing Authority County of Monterey
Director of Social Services: Martha Rodriguez

Period Beginning
Jan 01, 2024

Period Ending
Jan 31, 2024

Administrative Comments

Due to staff scheduling, Service hours were reduced and will be made up.

DSS Site Visits

Jan 05, 2024 Jan 12, 2024 Jan 26, 2024

Educational Classes

Depending on the needs and interests of the members of each community, LifeSTEPS provides a wide variety of on-site educational opportunities. LifeSTEPS has established a proprietary curriculum for three-month classes in core areas. Class preparation time is reflected in the staff hours.

Date	Class Title	Participants	Hours
Jan 05, 2024	Stretch Your Dollar (Senior): Budget Goals 2024	10	0.75
Jan 12, 2024	Stand-Alone Classes (Senior): Understanding Nutrition Facts Label	12	0.25
Jan 19, 2024	Emotional and Mental Health (Senior): The Art of Forgiveness	12	0.25
Jan 26, 2024	Thriving In Place (Senior): Fall Prevention	10	0.25
Jan 26, 2024	Money Matters (Senior): Needs Versus Wants	10	0.25

Totals 54 1.75

Individualized Case Management Services

Date	Topic	Residents	Hours
Jan 05, 2024	Financial Budgeting	6	1.50
Jan 12, 2024	Coping Skills/Emotional Support	1	0.25
Jan 12, 2024	Health Care	1	0.50
Jan 12, 2024	Translation	1	0.50
Jan 12, 2024	Healthy Lifestyles	12	3.00
Jan 19, 2024	Coping Skills/Emotional Support	12	3.00
Jan 19, 2024	Translation	1	0.50
Jan 26, 2024	Financial Budgeting	10	2.50
Jan 26, 2024	Health Care	10	2.50
Jan 26, 2024	Translation	1	0.50

Totals 55 14.75

Social Service Coordination

Date	Administration Type	Hours
Jan 05, 2024	Service Coordination Administration	0.75
Jan 12, 2024	Service Coordination Administration	1.00
Jan 19, 2024	Service Coordination Administration	1.50

Total 3.25

Community Building Enrichment Activities

Date	Event	Participants	Hours
Jan 05, 2024	Socials, General: National Whip Cream Day	9	2.00
Jan 12, 2024	Socials, General: Martin Luther King Jr. Social	10	2.00
Jan 19, 2024	Bingo/Loteria: Bingo	12	2.25
Jan 26, 2024	Socials, Coffee: Coffee/Hot Chocolate Social	11	2.00

Totals 42 8.25

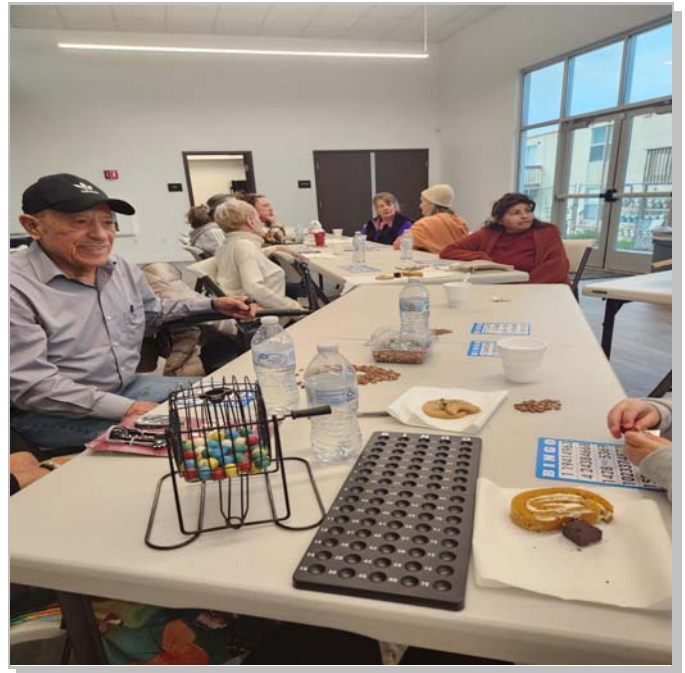
Percent of units served during the past 12 months: 98.8%

Resident Services in Action



Martin Luther King Jr. Social

Jan 12, 2024



Bingo

Jan 19, 2024



Empowerment. Impact. Community.
One STEP at a time.

3247 Ramos Circle Sacramento, CA 95827
916-965-0110, Fax: 916-965-0102
www.LifeSTEPSusa.org

Haciendas I and II

Property Owner: Monterey County Housing Authority Development Corporation

Property Management Company: Housing Authority County of Monterey

Director of Social Services: Sheila Morales

Period Beginning

Jan 01, 2024

Period Ending

Jan 31, 2024

Administrative Comments

During this period, LifeSTEPS observed the Martin Luther King Day and New Year's Day holidays. Due to the holiday(s), Service hours were reduced. Service make-up hours were applied during this period.

Service Requirements

CTCAC: Adult Educational classes 60 hours per year, Service Coordination 406 hours per year and individualized Health and Wellness services 117 hours per year

DSS Site Visits

Jan 05, 2024

Jan 09, 2024

Jan 12, 2024

Jan 19, 2024

Jan 22, 2024

Jan 26, 2024

Jan 29, 2024

Educational Classes

Depending on the needs and interests of the members of each community, LifeSTEPS provides a wide variety of on-site educational opportunities. LifeSTEPS has established a proprietary curriculum for three-month classes in core areas. Class preparation time is reflected in the staff hours.

Date	Class Title	Participants	Hours
Jan 05, 2024	Stretch Your Dollar: Budget Goals 2024	10	2.25
Jan 09, 2024	Emotional and Mental Wellness: The Art of Forgiveness	10	2.25
Jan 12, 2024	JOBS: Completing an Application	10	3.25
Jan 19, 2024	Stand-Alone Classes: Understanding Nutrition Facts Label	10	2.75
Jan 26, 2024	JOBS: Warehouse Employment: Entry Level Work	10	2.25

Totals

50

12.75

Additional Services and Education

Date	Topic	Participants	Hours
Employment			
Jan 19, 2024	Resume Workshops: Resume Workshop	2	2.75
Subtotal for Employment		2	2.75
Health and Wellness			
Jan 12, 2024	Mental Health: New Year, New Me	4	2.25
Jan 29, 2024	Food Distribution: Food Bank Distribution	27	5.25
Subtotal for Health and Wellness		31	7.50

Date	Topic	Participants	Hours
Life Skills Education			
Jan 05, 2024	ESL: ESL Classes	1	2.25
Subtotal for Life Skills Education		1	2.25

Totals **34** **12.50**

Individualized Case Management Services

Date	Topic	Residents	Hours
Jan 19, 2024	Rental	2	1.50
Jan 22, 2024	Rental	2	2.50

Totals **4** **4.00**

Social Service Coordination

Date	Administration Type	Hours
Jan 05, 2024	Service Coordination Administration	1.50
Jan 09, 2024	Service Coordination Administration	1.00
Jan 12, 2024	Service Coordination Administration	0.50
Jan 19, 2024	Service Coordination Administration	0.50
Jan 29, 2024	Service Coordination Administration	1.75

Total **5.25**

Donations

Date	Donor	Item Donated	Value
Jan 29, 2024	Food Bank of Monterey	Food Commodities	\$270.00

Total **\$ 270.00**

Community Building Enrichment Activities

Date	Event	Participants	Hours
Jan 09, 2024	Socials, General: Reintroducing DSS	10	3.75
Jan 22, 2024	Socials, Coffee: Winter Celebration	4	4.50
Jan 26, 2024	Socials, General: Re-Introducing DSS Goodie Bags	44	3.75

Totals **58** **12.00**

Percent of units served during the past 12 months: 99.0%

Resident Services in Action



Re-Introducing DSS Goodie Bags

Jan 26, 2024



Food Distribution

Jan 29, 2024



Castroville Farm Labor Center

Property Owner: Housing Authority County of Monterey
Property Management Company: Housing Authority County of Monterey
Director of Social Services: Martha Rodriguez

Period Beginning
Jan 01, 2024

Period Ending
Jan 31, 2024

Administrative Comments

During this period, LifeSTEPS observed the Martin Luther King Day and New Year's Day holidays. Due to the holiday(s) and staff scheduling, Service hours were reduced. Shortages due to staff scheduling will be made up.

Service Requirements

CTCAC: Adult Educational Classes 60 hours per year, Bona Fide Service Coordinator 400 hours per year

DSS Site Visits

Jan 09, 2024 Jan 16, 2024 Jan 23, 2024

Educational Classes

Depending on the needs and interests of the members of each community, LifeSTEPS provides a wide variety of on-site educational opportunities. LifeSTEPS has established a proprietary curriculum for three-month classes in core areas. Class preparation time is reflected in the staff hours.

Date	Class Title	Participants	Hours
Jan 09, 2024	JOBS: Completing an Application	12	0.25
Jan 16, 2024	Stand-Alone Classes: Understanding Nutrition Facts Label	10	0.25
Jan 16, 2024	JOBS: Warehouse Employment: Entry Level Work	10	0.25
Jan 23, 2024	Money Matters: Needs Versus Wants	15	0.25

Totals 47 1.00

Individualized Case Management Services

Date	Topic	Residents	Hours
Jan 09, 2024	Employment Counseling	12	3.00
Jan 16, 2024	Employment Job Skills	10	2.50
Jan 16, 2024	Healthy Lifestyles	10	2.50
Jan 23, 2024	Financial Budgeting	15	3.75

Totals 47 11.75

Social Service Coordination

Date	Administration Type	Hours
Jan 09, 2024	Service Coordination Administration	0.50
Jan 16, 2024	Service Coordination Administration	0.50

Date	Administration Type	Hours
Jan 23, 2024	Service Coordination Administration	1.75

Total **2.75**

Community Building Enrichment Activities

Date	Event	Participants	Hours
Jan 09, 2024	Crafts: Painting Social	11	2.25
Jan 16, 2024	Bingo/Loteria: Loteria Social	8	2.00
Jan 23, 2024	Socials, General: January Birthday Social	16	2.25

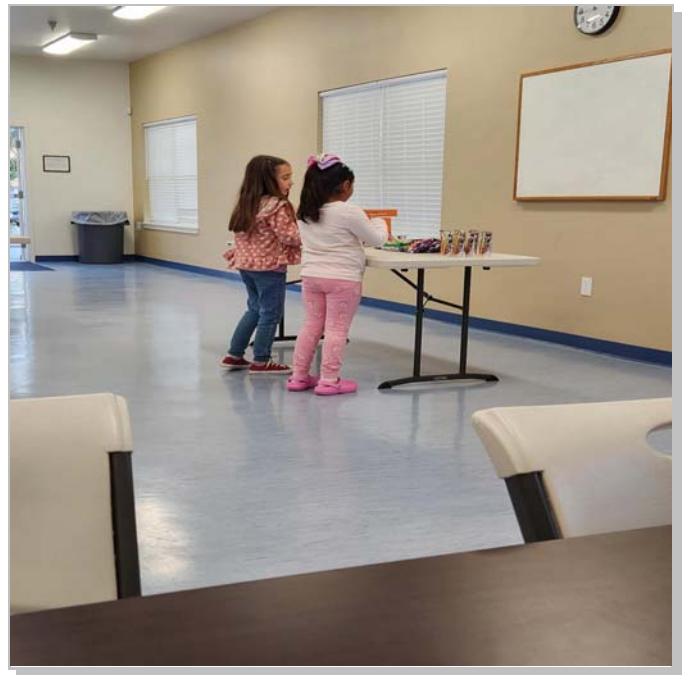
Totals **35** **6.50**

Percent of units served during the past 12 months: 100.0%

Resident Services in Action



Painting Social
Jan 09, 2024



January Social
Jan 23, 2024



Haciendas 3 and Haciendas Senior

Property Owner: Monterey County Housing Authority Development Corporation

Property Management Company: Housing Authority County of Monterey

Director of Social Services: Sheila Morales

Period Beginning

Jan 01, 2024

Period Ending

Jan 31, 2024

Administrative Comments

Due to staff vacation, Service hours were reduced. Service make-up hours were applied during this period.

Service Requirements

CTCAC: Adult Educational Classes 60 hours per year, Bona Fide Service Coordinator 326 hours per year

DSS Site Visits

Jan 03, 2024

Jan 10, 2024

Jan 17, 2024

Jan 31, 2024

Educational Classes

Depending on the needs and interests of the members of each community, LifeSTEPS provides a wide variety of on-site educational opportunities. LifeSTEPS has established a proprietary curriculum for three-month classes in core areas. Class preparation time is reflected in the staff hours.

Date	Class Title	Participants	Hours
Jan 03, 2024	Emotional and Mental Wellness: The Art of Forgiveness	10	2.25
Jan 03, 2024	Stretch Your Dollar: Budget Goals 2024	10	2.25
Jan 10, 2024	JOBS: Completing an Application	10	2.25
Jan 17, 2024	JOBS: Warehouse Employment: Entry Level Work	11	2.25
Jan 17, 2024	Stand-Alone Classes: Understanding Nutrition Facts Label	11	2.25
Jan 31, 2024	Money Matters: Needs Versus Wants	11	3.25

Totals

63

14.50

Additional Services and Education

Date	Topic	Participants	Hours
Health and Wellness			
Jan 03, 2024	Food Distribution: Food Bank Distribution	21	4.25
Jan 17, 2024	Food Distribution: Food Bank Distribution	25	4.25
Subtotal for Health and Wellness		46	8.50

Totals

46

8.50

Individualized Case Management Services

Date	Topic	Residents	Hours
Jan 10, 2024	Computer/Technology	1	1.00

Date	Topic	Residents	Hours
Jan 10, 2024	Healthy Lifestyles	1	1.00
Jan 17, 2024	Utilities	1	0.50

Totals **3** **2.50**

Social Service Coordination

Date	Administration Type	Hours
Jan 05, 2024	Service Coordination Administration	0.75
Jan 10, 2024	Service Coordination Administration	1.00
Jan 12, 2024	Service Coordination Administration	0.75
Jan 17, 2024	Service Coordination Administration	0.50
Jan 19, 2024	Service Coordination Administration	0.75
Jan 26, 2024	Recording Needs Assessment Surveys	0.75
Jan 31, 2024	Service Coordination Administration	1.50

Total **6.00**

Donations

Date	Donor	Item Donated	Value
Jan 03, 2024	Food Bank of Monterey	Food Commodities	\$210.00
Jan 17, 2024	Food Bank of Monterey	Food Commodities	\$250.00

Total **\$ 460.00**

Community Building Enrichment Activities

Date	Event	Participants	Hours
Jan 10, 2024	Socials, General: New Year's Social	7	2.75
Jan 31, 2024	Bingo/Loteria: Bingo with LifeSTEPS	4	3.25

Totals **11** **6.00**

Percent of units served during the past 12 months: 98.9%

Resident Services in Action



Bingo

Jan 31, 2024

MEMORANDUM

To: Board of Commissioners
From: Nora Ruvalcaba, Development Analyst
Thru: Zulieka Boykin, Executive Director/President/CEO
Date: February 12, 2023
Re: **MONTHLY DEVELOPMENT DEPARTMENT REPORT**



[Development department highlights](#)

- **One Parkside, LP:** Staff has submitted the Placed-In-Service package to CTCAC and is awaiting issuance of 8609's,
- **One Parkside, LP; Once** CTCAC processes the Placed-In-Service package and issues 8609's, we will submit a request for final Capital Contribution from Investor in the amount of \$205,979.00.
- **One Parkside, LP - HOME/PLHA Retention Release of Funds:** City of Salinas released retention funds in the amount of \$94,801.30 and HACM is in receipt of these funds.
- **Potential Development Partner:** Development staff and Executive Director met with potential Development Partner to discuss and review potential projects and a timeline for potential developments.
- **Rippling River Affordable Housing LP:** Notification was issued to the John Stewart Company of termination of Property Management services. The original effective date of the transition was February 1, 2024. The transition date has been extended to February 15th to allow for full Yardi set-up. As of the revised transition date, HACM Property Management will be managing site.

There was a resident meeting held at the site on January 4, 2024, at which John Stewart Company and HACM staff were present. The purpose of the meeting was to notify the residents of the plan for the management transition and to include them in the process.

Residents had the opportunity to provide feedback and were provided with information related to the proposed changes, how to contact staff and how to share their concerns so that they are addressed.

Tentative follow-up meeting pending for early February.

Potential Development Opportunities

- **Division Avenue (Salinas)**
 - The Development staff and Executive Director have continued discussions with the City of Salinas regarding available parcels and potential development of the available land.
 - The Draft Exclusive Negotiating Rights Agreement with the City of Salinas is pending execution and a potential Land Disposition Agreement to obtain site control of the seven parcels associated with this potential development is in discussion. The City of Salinas has discussed their intent related to the various parcels being discussed.
 - Development staff and Executive Director are moving forward with the help of Knight Development in accessing next steps to move into predevelopment activity including obtaining funds for predevelopment activity, preparing for funding applications and obtaining site control.
 - HACM staff are pending a follow-up meeting with City staff regarding site control and predevelopment funds for the expected remediation of environmental concerns.

- **Parcel B Property (Salinas)**
 - Pending City of Salinas request for funding submitted along with Division Avenue.
 - The Executive Director initiated a meeting between HACM Staff and a potential development partner to determine if a joint venture would be appropriate to proceed with development at this location. Initial feasibility determination underway.

- **APN# 024-261-001 (Greenfield)**
 - Preliminary market study is in process; revisions to the initial site plan to increase the number of units with density bonus allowed are also being updated.
 - Met with potential Development partner and are exploring next steps and potential timeline.

- **855 E. Laurel Avenue (Salinas)**
 - Determination of development opportunity is pending further details from County staff regarding land access and funding opportunities.

- **Rippling River (Carmel Valley)**
 - The Executive Director initiated a meeting between HACM Staff and a potential development partner to determine if a joint venture would be appropriate to proceed with development at this location. Initial feasibility determination underway.

Marketing

- Staff are working with Executive Assistant and new vendor to incorporate the HDC website into the new HACM website.
- On-going internal review of potential marketing events and/or media opportunities being explored on a regular basis to determine proper platforms to publish on.

One Parkside, LP

- Placed-in-Service package was submitted to CTCAC. Staff will be requesting the issuance of 8609's and release of final Capital Contribution.

123 Rico CLEEN loan

- Information regarding proposed use of funds was provided to state IBank representative and is pending response before proceeding with acquiring bids for scope of work.
- Remaining funds available are \$366,758.02.

Audits

- Weekly meetings with the Finance Director and Auditor are ongoing.
- Weekly meetings with third party audit team to review outstanding items for the LP audits and tax returns.
- Final HDC audit and HACM 2022 audits received.

Capital Improvements

- The development team is working with our property management teams to ensure needed capital improvement requests throughout the portfolio are completed in a timely manner and with the approval of appropriate Lender/Investor groups. Details can be found in the property management section of the report for those items currently underway and in the property management reports.

Tynan Modernization job close-out

- Building C – DKI has completed approximately 85% of the needed remediation and repairs.
- Final phase of sand coating (stucco) in process, followed by drywall texture and exterior painting.
- Progress has been slightly interrupted due to the recent rains. There were a few areas identified that developed minor leaks due to the strong winds and heavy rains. Those issues are being assessed and addressed to prevent any future issues.
- The tentative completion date for all work and for contractors to be off site is February 23, 2024.

Tynan commercial space

- Approximately 2,500 sf commercial space available.
- There have been inquiries made regarding the available space that is currently vacant.

Haciendas 1&2 metals job

- Maintenance staff assisting in repairs of some of the rusted railings and fascia.

- Development staff working on timeline and assisting with coordinating of repairs and for installation of new awnings.

Project Based Section 8

- East Garrison aka Alfred Diaz-Infante apartments has submitted the required supporting documentation. HAP contract has been executed by the Executive Director.
- Magnolia Place apartments has submitted the required supporting documentation for the Executive Director execution of the HAP Contract.
- Greenfield Commons I was awarded 27 PBV vouchers, for which the Agreement to Enter into a Housing Assistance Payments Contract (AHAP) was executed by the Executive Director in August 2023. The project is now under construction and pending finalization and submission of required documentation to execute the HAP.

HDC Portfolio managed by the John Stewart Company and Paso Robles Housing Authority

- Please see attached property management reports.

Resident Services

- Please see attached resident services highlights.

Staffing

- The Development Analyst position remains open. Human Resources is in the recruitment process.
- The Director of Development position was posted and remains open. Human Resources is in the recruitment process.
- The Project Manager position was posted and remains open. Human Resources is in the recruitment process.
- Temporary Office Assistant has been assigned to the department starting February 12, 2024.

Meetings and Classes will be held
in the Community Room.

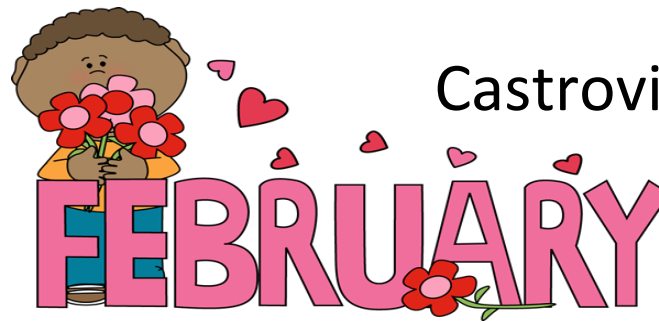
Edith Rodriguez
Director of Social Services

831-296-2199

Resident Message Line:

855-395-4463

Drop by or call for an appointment.



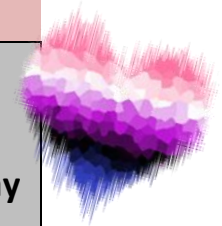
Castroville Farm Labor Center

Tuesday, February 6	Tuesday, February 13	Tuesday, February 20	Tuesday, February 27
<p><u>Social Services:</u> DSS, will be available between 9:30am-6:00pm</p> <p><u>Class: About Shingles</u> 11:00am-12:00pm</p> <p><u>Class: Child Care Lesson</u> 2:00pm-3:00pm</p> <p><u>February Crafts</u> Stop by to make some February/Valentine's Day crafts! 4:00pm-6:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:30am-6:00pm</p> <p><u>Class: Getting a Good Night's Sleep</u> 11:00am-12:00pm</p> <p><u>Class: JOBS – Youth Employment</u> 2:00pm-3:00pm</p> <p><u>Valentine's Day Social</u> Stop by for a goody bag! 4:00pm-6:00pm</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Happy Valentine's Day </div>	<p><u>Social Services:</u> DSS, will be available between 9:30am-6:00pm</p> <p><u>Class: Tax Preparation Lesson</u> 11:00am-12:00pm</p> <p><u>Class: Vitamins and Supplements</u> 2:00pm-3:00pm</p> <p><u>Pizza Social</u> Stop by for some pizza! 4:00pm-6:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:30am-6:00pm</p> <p><u>Class: Why You Need a Budget</u> 11:00am-12:00pm</p> <p><u>Case Management</u> Stop by with any questions! 1:00pm-3:00pm</p> <p><u>February Birthday Social</u> Stop by for some treats! 4:00pm-6:00pm</p>

Reminders:

LifeSTEPS will be closed:

**Monday, February 19 in
observance of Presidents' Day**



Fanoe Vista

After School Club

Residents ages 5-18 register in the *Community Room*

Monday to Friday

2:30 pm – 5:00 pm

Do you need help with homework?
Do you love to read? Write? Create?
Do you want to have fun and still learn?
Are you looking for the most legit place to be?

Teen Club

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With Amy Cota, the **LifeSTEPS** Program Coordinator!

Wednesday, February 14, 2024

2:30 pm - 5:00 pm

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Monday, February 19

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Meetings and Classes will be held
in the Community Room.

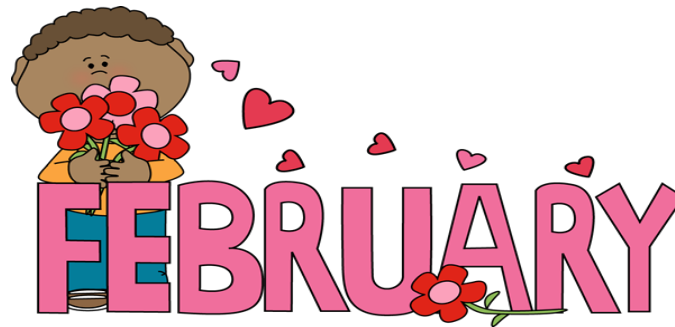
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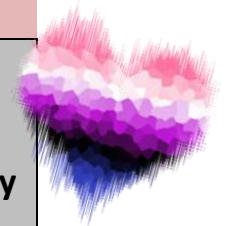
Fanoe Vista

Monday, February 5	Monday, February 12	Monday, February 19	Monday, February 26
<p><u>Social Services:</u> DSS, will be available between 9:30am-5:00pm</p> <p><u>Class: About Shingles</u> 10:00am-11:00am</p> <p><u>Class: Child Care Lesson</u> 12:00am-1:00pm</p> <p><u>Food Distribution</u> 2:00pm-4:00pm</p> 	<p><u>Social Services:</u> DSS, will be available between 9:30am-5:00pm</p> <p><u>Class: Getting a Good Night's Sleep</u> 10:00am-11:00pm</p> <p><u>Class: JOBS – Youth Employment</u> 1:00pm-2:00pm</p> <p><u>Valentine's Day Social</u> Stop by for some food! Everyone is welcome! 3:00pm-5:00pm</p> 	<p>LifeSTEPS Office Closed</p>	<p><u>Social Services:</u> DSS, will be available between 9:30am-5:00pm</p> <p><u>Case Management</u> Stop by with any questions! 10:00am-12:00pm</p> <p><u>Class: Why You Need a Budget</u> 12:00pm-1:00pm</p> <p><u>February Birthday Social</u> Stop by for some treats! Everyone is welcome! 3:00pm-5:00pm</p>

After School Program
Monday-Friday
2:30pm-5:00pm

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Empowerment. Impact.
Community.
One STEP at a time.

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831-296-2199

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One Parkside

Friday, February 2	Friday, February 9	Friday, February 16	Friday, February 23
<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Class: About Shingles</u> 10:00am-11:00am</p> <p><u>Mardi Gras Social</u> Everyone is welcome 1:00pm-3:00pm</p> <p><u>Case Management</u> Stop by with any questions! 3:00pm-5:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Case Management</u> Stop by with any questions! 10:00am-12:00pm</p> <p><u>Chinese New Year</u> Stop by for some food! Everyone is welcome! 1:00pm-3:00pm</p> <p><u>Class: Getting a Good Night's Sleep</u> 3:00pm-4:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Class: Tax Preparation Lesson</u> 10:00am-11:00am</p> <p><u>Valentine's Day Social</u> Everyone is welcome! 1:00pm-3:00pm</p> <div style="border: 1px solid black; padding: 5px; display: inline-block; text-align: center;"> Happy Valentine's Day </div> <p><u>Class: Vitamins and Supplements</u> 3:00pm-4:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Class: Why You Need a Budget</u> 11:00am-12:00pm</p> <p><u>February Birthday Social</u> Come celebrate the birthdays in February! 1:00pm-2:00pm</p> <p><u>Bingo</u> Everyone is welcome! 2:00pm-4:00pm</p>

		<p>Reminders:</p> <p>LifeSTEPS will be closed:</p> <p>Monday, February 19 in observance of Presidents' Day</p>
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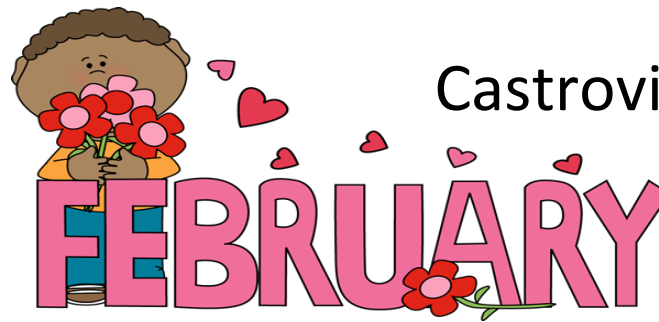
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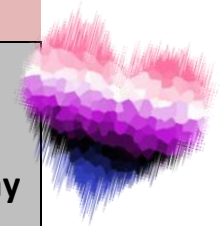
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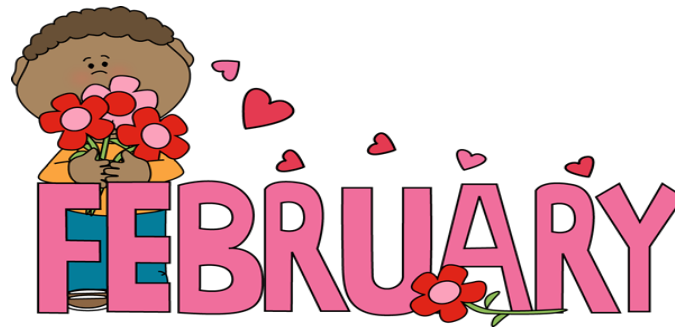
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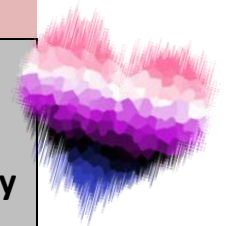
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One Parkside

Friday, February 2	Friday, February 9	Friday, February 16	Friday, February 23
<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Class: About Shingles</u> 10:00am-11:00am</p> <p><u>Mardi Gras Social</u> Everyone is welcome 1:00pm-3:00pm</p> <p><u>Case Management</u> Stop by with any questions! 3:00pm-5:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Case Management</u> Stop by with any questions! 10:00am-12:00pm</p> <p><u>Chinese New Year</u> Stop by for some food! Everyone is welcome! 1:00pm-3:00pm</p> <p><u>Class: Getting a Good Night's Sleep</u> 3:00pm-4:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Class: Tax Preparation Lesson</u> 10:00am-11:00am</p> <p><u>Valentine's Day Social</u> Everyone is welcome! 1:00pm-3:00pm</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;">  </div> <p><u>Class: Vitamins and Supplements</u> 3:00pm-4:00pm</p>	<p><u>Social Services:</u> DSS, will be available between 9:00am-5:00pm</p> <p><u>Class: Why You Need a Budget</u> 11:00am-12:00pm</p> <p><u>February Birthday Social</u> Come celebrate the birthdays in February! 1:00pm-2:00pm</p> <p><u>Bingo</u> Everyone is welcome! 2:00pm-4:00pm</p> 

		<p>Reminders:</p> <p>LifeSTEPS will be closed:</p> <p>Monday, February 19 in observance of Presidents' Day</p>	
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Empowerment. Impact.
 Community.
 One STEP at a time.



JSCo Monthly Management Report

Monday, JANUARY 2024

BENITO AFFORDABLE/FLC

1. Vacancy:

a) Benito Affordable has 1 PBV vacant unit, 1 applicant in process. File will be submitted to JSCO RM and Compliance Dept for review. Looking for a move in date of 2-8-2024 for move in.

b) Benito FLC – 100% Occupied

2. Audits Pending:

a. HOME Audit is scheduled for March 8, 2024 for Benito FLC.

b. Benito Affordable is waiting for the closed-out letter from CTCAC that was done on May 25, 2023..

3. Resident Services:

a.) LifeSteps is at the site 2 times a month, total 16 hrs. a month. Has a good turnout for the food distribution that Monterey County Food Bank provides to the sites. LifeSteps is struggling to get services that will bring in residents to participate in the classes the offer.

b.) Community rooms are open to the public subject to COVID safety protocols. The community room is being reserved by residents at least once a month.

4. Capital Improvement/ maintenance.

a) Received updated proposal for the extra cameras for both sites.

b) Waiting on the window replacement approval work to be done for Benito FLC from HDC.

c) Waiting on approval from HDC for the repair work on upstairs walkway for BEA/BEF. Waiting on a third bid for Building #8 patch work on the walkway.

d) Waiting on bark quote to be approved for Benito Affordable.

e) Daycare is waiting for the chain link fence to be repair.

f) Benito FLC/Affordable maintenance position has been filled as of 1-8-2024.



MONTEREY AFFORDABLE

1. Vacancy: 100 % Occupancy -No vacancies
2. Reporting & Audits: CTCAC 2023 Audit completed, close out letter pending.
3. Resident Services:

Life Steps is active:

- i. After school Program Coordinator, Severo Gasca, Mon- Friday 4:15-7 pm
 - ii. Director of Social Services, Sheila Morales, / Every other Tuesday (Twice Monthly) 9:00 am-5:00pm
 - iii. Community rooms open to the public.
5. Capital Improvement/ maintenance:
 - a. King City Glass on-site windows replacements: Pending HA Approval
 - b. Property Mulch, wood chips quotes submitted/ Pending Approval: Mission Lawn, Tree Brothers, Smith and Enright
 - c. Camera bids: Core Surveillance, sentry alarm systems, central coast satellite
 - d. Deck resurface Project: Bids from Triano, Build X
 6. **Staffing:**
 - a.) **Property Manager position open recruiting in process**

FANOE VISTA APARTMENTS

1. Vacancy:
 - a. 100% Occupancy Jan 2024
2. Reporting & Audits Pending
 - a. CTCAC Audit completed 6/13/23 -2 findings, Corrections submitted on 7/31/23 still waiting on close out letter.
3. Resident Services: Services: Life Steps: On site Mondays 10-5:00pm -Edith Rodriguez for Social Services support
 - a. After School program in session Monday- Friday 3pm-5:00pm
 - b. Food bank distribution is scheduled first Monday each month.
 - c. Community rooms are open for resident events/rentals.
 - d. Senior Bingo Mornings Wednesdays beginning last week February 2024
4. Capital Improvements/ maintenance:
 - a.) Pending approval for additional landscaping work needed for trench needed behind Building H and concrete to avoid flooding.
 - b.) Property signage needs replacement, obtaining proposals

TYNAN VILLAGE APARTMENTS

1. Vacancy:
 - a. 2 vacancies
2. Reporting & Audits Pending
 - a. City of Salinas 2020 audit complete; 2021 audit in progress.
3. Resident Services
 - a. Afterschool Program scheduled daily from 3-5 PM.
4. Capital Improvements/Maintenance:
 - a. 3 irrigation proposals pending approval.
 - b. Piping near bakery needs to be redone. 3 proposals pending approval.
 - c. Building C stairwell in process of repairs.
 - d. Paint for all hallways and stairways approved and on-hold until further notice per HDC.
 - e. Proposals obtained for parking restriping-pending HDC approval.
 - f. Proposals for fencing along property line pending.
 - g. Axis working on issues caused during modernization project.
 - h. Rat infestation- additional rodent stations have been placed along property line. IPM has started additional treatments.
 - i. Several transients are frequently on the property. Working with Regional Manager to address the issue.
5. Staffing Update:
 1. Open Occupancy Specialist position



PASO ROBLES
HOUSING AUTHORITY

Est. 1942

901 30th Street
Paso Robles, CA 93446
(805) 238-4015

REPORT TO HDC REGULAR BOARD MEETING, February 2024

OAK PARK 1, 80 Units, 100% Tax Credit with HOME, and USDA

1. Vacancy:
 - a. 100% Occupied
2. Audits Pending
 - a. None
3. Resident Services
 - a. Youthworks daily activity, 2 hours a day, Mon- Fri
 - b. Food Distribution, 2 times a month
4. Capital Improvement/ Maintenance
 - a. No capital improvements or major maintenance pending.

OAK PARK 2, 70 Units, 100% Tax Credit

1. Vacancy:
 - a. 100% Occupied
2. Reporting & Audits Pending
 - a. None
3. Resident Services
 - a. Youthworks daily activity, 2 hours a day Mon- Fri
 - b. Food Distribution, 2 times a month
4. Capital Improvement/ Maintenance
 - a. No capital improvements or major maintenance pending.

MEMORANDUM

TO: Board of Commissioners, Housing Authority of the County of Monterey
FROM: Jonathan Campbell, Housing Programs Director
THRU: Zulieka Boykin, Executive Director/CEO
SUBJECT: Housing Programs Report – January 2024
DATE: February 12, 2024



VMS Updates

For the Housing Choice Voucher Program Utilization chart, see **Appendix A.**

HCV	As of 1st of	As of 1st of
	Month	Month
	UML	HAP Expense
Homeownership	3	\$ 749.00
Family Unification	43	\$ 77,100.00
Portable Voucher Paid	18	\$ 27,919.00
Tenant Protection	23	\$ 33,119.00
Enhanced Vouchers	19	
VASH	281	\$ 397,176.00
FYI	7	\$ 11,712.00
AOV	3,153	\$ 4,867,331.00
HCV FSS Escrow Deposits		\$ 17,127.72
HCV All HAP exp After 1st of Month		\$ 26,422.00
UML and HAP For Month	3,528	5,415,106
Vouchers Under Lease on Last Day of Month	3,526	
Number of HCV Vouchers Searching	230	
Number of PBV under HAP & leased	684	
Number of PBVs under HAP & not leased	64	
PBV Total HAP expenses		\$ 1,085,765.00
Mainstream	59	\$ 104,538.00
MS FSS Escrow		\$ -
MS HAP Expense after 1st		\$ -
MS Vouchers Looking	7	
EHV	270	\$ 569,883.00
EHV FSS Escrow		\$ 612.00
EHV Vouchers Looking	28	
EHV HAP After 1st of Month		\$ 1,451.00

Annual Reexaminations

Annuals	Total
2024	294
Jan	294
Grand Total	294

We are working with YARDI to implement a more robust Management Dashboard System to be able to monitor timeliness of annual reexaminations (SEMAP Indicator 9). Additionally, we are developing an in-house quality control system to improve responsiveness to errors and train accordingly.

Interim Reexaminations

Interims	Total
2024	237
Jan	237
Grand Total	237

Most of our interim reexaminations are because of rent increase requests made by owners. Our goal is to get rent increase requests processed with annual reexaminations to reduce administrative burden and that to the participant families and landlords.

Moves with Continued Assistance

Unit Change	Total
2024	12
Jan	12
Grand Total	12

Inspections

Inspections	Total
2024	60
Jan	60
Grand Total	60

Similarly to annual reexaminations, we are working with YARDI to update the management dashboard to allow the monitoring of the timeliness of continuing HQS Inspections. We will be reporting on NSpire and its effects on HACM's HCV inspections in next month's meeting.

Expired Search Vouchers

Expired	Total
2024	16
Jan	16
Grand Total	16

End of Program Participation

Terminations	Total
2024	11
Jan	11
Grand Total	11

Project-Based Vouchers

HACM has 748 units under the various HAP contracts with an occupancy rate of 91%. Meanwhile, we have committed 203 program vouchers via AHAP contracts.

HCV Wait List and Lease-Up

	ISSUED	HOUSED
Jan-24	59	21

Family Self-Sufficiency

58 Families have accrued FSS Escrows totaling between them \$29,485 (according to finance as of 2/12/2024). That's more than half of the total 102 families in the FSS program.

Fair Housing

In January we processed 30 requests for Reasonable Accommodation 18 of those were for extension in searching for a unit, 6 were for live-in aides, and 6 were for other.

HUD Updates

PIH Notices

- 2024-4 - Guidance on Eligible Uses for PIH Program Funds Related to Persons With Limited English Proficiency
- Registration of interest for special administrative fees for development of a housing mobility-related services plan (HMRP) under PIH Notice 2023-07: Implementation of Federal Fiscal Year (FFY) 2023 Funding Provisions for the Housing Choice Voucher Program



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
WASHINGTON, DC 20410-5000

OFFICE OF PUBLIC AND INDIAN HOUSING

Special Attention of:

Public Housing Agencies administering the Housing Choice Voucher and/or Public Housing Programs, PIH grantees

NOTICE PIH 2024-04

Issued: January 31, 2024

Expires: Effective until amended, superseded, or rescinded

Cross References: N/A

SUBJECT: GUIDANCE ON ELIGIBLE USES FOR PIH PROGRAM FUNDS RELATED TO PERSONS WITH LIMITED ENGLISH PROFICIENCY

1. Applicability:

This Notice provides guidance for public housing agencies (PHAs) administering the Public Housing (PH) and/or Housing Choice Voucher (HCV) programs, along with other PIH grantees (for example, recipients of federal funding through PIH's NOFO process), on compliance with federal requirements for providing meaningful access to persons with limited English proficiency (LEP).

2. Purpose:

The Fiscal Year 2022 Joint Explanatory Statement (JES) for Division L - Transportation, Housing and Urban Development, and Related Agencies Appropriations Act, 2022 directed the Office of Public and Indian Housing (PIH) and Office of Fair Housing and Equal Opportunity (FHEO) to develop guidance for utilizing PIH program funds for LEP related activities. The JES also directed HUD to identify best practices for language access plans and cost-effective strategies for accessing robust language assistance.

The guidance consolidates and clarifies information on the existing eligible use of funds within PIH program funds for LEP-related activities.

3. Background:

Individuals who do not speak English as their primary language and have limited ability to read, write, speak, or understand English may be a person with LEP. These individuals may be entitled to language assistance for a particular service, benefit, or encounter. Federal laws applicable to language access include Title VI of the Civil Rights Act of 1964, the Title VI regulations, and [Executive Order 13166](#). Many federal programs, states, and localities also have provisions requiring language services for LEP individuals.

Title VI requires that all recipients of federal financial assistance, including subrecipients, take reasonable steps to ensure that persons with LEP have meaningful access to the recipient's programs or activities including by ensuring meaningful access to benefits, services, information, and other vital aspects of the recipient's programs or activities.¹ Failure to ensure that persons with LEP have the opportunity to effectively participate in programs or receive their benefits may violate Title VI's prohibition against national origin discrimination.

In addition, [Executive Order 13166](#), "Improving Access to Services for Persons with Limited English Proficiency,"² requires Federal agencies and recipients of federal financial assistance to provide meaningful access to all programs and services. Language for persons with LEP can be a barrier to accessing important benefits or services; understanding; and exercising necessary rights; complying with applicable responsibilities; or understanding other information provided by recipients who administer federally funded programs and activities.

The Department released guidance for HUD-funded recipients on LEP compliance requirements, titled "[Final Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons](#)."³ This LEP guidance describes compliance standards that recipients of HUD funding should follow to ensure that their programs and activities are accessible to persons with LEP and do not discriminate based on national origin..."

4. LEP Compliance Requirements:

Language access policies, plans, and procedures will differ depending on a variety of factors, including the recipient's nature or method of operation and its points of contact with the public. To meet their obligation to provide meaningful access to their programs, HUD recommends that federally assisted recipients, including PHAs and PIH grantees:

- (1) conduct a four-factor analysis;
- (2) develop a Language Access Plan; and
- (3) provide appropriate language assistance.

a. Four-factor Analysis

Grantees should apply a 'four-factor analysis', which provides a framework for reviewing the totality of the circumstances and balances the need to ensure meaningful access without imposing undue burdens on recipients. The analysis involves:

- (1) Reviewing the number or proportion of persons with LEP served or in the eligible service population;
- (2) The frequency in which persons with LEP interact with the program;
- (3) The nature and importance of the program, activity, or service; and

¹ More information on Title VI can be found at [42 U.S.C. § 2000d](#); HUD's implementing regulations are at [24 C.F.R. Part 1](#)

² [65 FR 50121](#)

³ [FR-4878-N-02](#)

- (4) The resource and costs to the recipient Demonstration by a recipient that a certain service option would present a material burden can then be considered during the four-factor analysis.

b. Language Access Plan

After conducting the four-factor analysis, the recipient should develop a Language Access Plan for how to meet the needs of the LEP populations the recipient serves.

Some helpful elements in designing this plan include:

- identifying persons with LEP who need language assistance;
- identifying the staff who may have contact with persons with LEP;
- the language assistance provided;
- conducting effective outreach to the LEP community;
- training staff;
- determining which documents are vital;
- translating information materials;
- providing interpreters for meetings;
- connecting with and developing community resources to help with language services; and
- a timeframe for updating the Language Access Plan (LAP), including seeking input from the community.

Additionally, PHAs and PIH grantees should ensure that the Language Access Plan:

- Identifies informational materials that must be translated (e.g., leases, marketing materials, tenants' rights, and responsibilities brochures);
- Contains procedures for providing appropriately translated notices to persons with LEP (e.g., eviction notices, security information, emergency plans) and providing interpreters for large, medium, small, and one-on-one meetings;
- Contains procedures for frontline staff to identify when a person has language access needs and how to assist them;
- Develops community resources, partnerships, and other relationships to help with the provision of language services; and
- Makes provisions for monitoring and updating the LAP, including seeking input from beneficiaries and the community on how it works and what other actions should be taken.

HUD has a [Language Access Plan](#) that can be used by PHAs and PIH grantees in analyzing their needs.

c. Language Assistance Services

After developing the Language Access Plan, recipients should implement the plan by providing appropriate language assistance services to the LEP population the recipient serves. Some language assistance services recipients can provide include oral interpretation, bilingual staff, telephone service line interpretation, written translation services, notices of availability of LEP

services, or referrals to community liaisons proficient in the language. The recipient may have another organization supply interpretation services as needed, use a telephone service line interpreter, or contract another agency in the same community with bilingual staff to provide interpretation services.⁴

5. PIH Program Funds Use:

[HUD's LEP guidance](#) explains the obligation of federal financial assistance recipients to take reasonable steps to meet their regulatory and statutory obligations in ensuring that persons with LEP have meaningful access within HUD's programs and activities, including for PH and HCV programs. While this guidance does not cover line-item expenses that can be covered by program funds, PHAs and PIH grantees must take reasonable steps to ensure meaningful access to programs and activities for persons with LEP.

a. Operating Fund

Pursuant to [Section 9\(g\) of the Housing Act of 1937](#)⁵, PHAs may use their Operating Fund program subsidy (Op Funds) to ensure meaningful access for persons with LEP related to the PHA's operations. Op Fund can be used to ensure access for persons with LEP only within the Public Housing program.

Example: During public housing eviction proceedings, a standard PHA action, Op Funds can be used to ensure the public housing resident with LEP has meaningful access to all relevant information related to the proceeding in their native language.

In this situation, activities related to services may include providing appropriately translated notices, including notices of eviction and notices advising persons with LEP of free language assistance. In-person interpretation assistance is necessary for termination and eviction hearings due to the significance of these interactions, and the PHA should provide qualified and trained interpretation services. Similarly, a PIH grantee could use Op Funds to create a greeting message for telephone numbers with options in multiple languages.

b. Capital Fund

PHAs can use their Capital Fund program grant (Cap Fund) to address LEP requirements. Pursuant to Section 9(g) of the Housing Act of 1937 and the regulations found at [24 CFR Part 905.314\(l\)](#), PHAs can use a portion (up to 100% for small, non-troubled PHAs, and 20% for all other PHAs) of a Cap Fund Grant for any eligible cost under the Operating Fund Program, including the Op Fund Activities listed in the Op Fund section within this notice.

PHAs can also use up to 10% of a Cap Fund grant for Management Improvement activities as indicated in [24 CFR Part 905.314\(i\)](#). Management Improvements are noncapital activities that are project-specific or PHA-wide improvements needed to upgrade or improve the operation or

⁴ HUD's website provides additional [frequently asked questions related to LEP compliance](#). Frequently asked questions related to LEP compliance may be found

⁵ 42 U.S.C. § 1437g

maintenance of the PHA's projects, to promote energy conservation, to sustain physical improvements at those projects, or correct management deficiencies. PHAs must be able to demonstrate the linkage between the management improvement and the correction of an identified management deficiency. The PHA must identify LEP requirements as a management deficiency and include the LEP work items in the Capital Fund 5-Year Action Plan in order to use Capital Funds for management improvement activities that facilitate access for persons with LEP in Public Housing.

Example: Eligible activities under Management Improvements BLI 1408 include, but are not limited to, the following:

- PHAs can use up to 10% of an annual Cap Fund grant for Management Improvements (BLI 1408) to upgrade their online systems for program participant applications to allow future residents to apply in languages other than English.
- PHAs can use BLI 1408 to train PHA staff to better serve with LEP.
- Capital Funds can be used for facilitating communication during resident consultation for the development, financing, and/or modernization of public housing developments, such as hiring or contracting a qualified interpreter or translator equipped to communicate in different languages so that persons with LEP who are in Public Housing are properly informed during relocation counseling.

c. HCV Administrative Fees

PHAs and PIH grantees may use HCV Administrative Fees or unrestricted net position (UNP) to address LEP requirements for HCV and project-based voucher (PBV) program activities and materials.

Example: Eligible activities include, but are not limited to, the following:

- Facilitating communication, through on-site or remote translation during the oral briefing required at 24 CFR 982.301 and the informal review and informal hearing at 24 CFR 982.554 and 982.555.
- Software upgrades to allow families to use on-line application or recertification systems in languages other than English.
- Translating program resources such as the written materials in the family information packet and other key program forms, notices, and policies in accordance with the Language Access Plan.

d. Mainstream Voucher and Emergency Housing Voucher Administrative and Service Fees

Mainstream (MS) Voucher's administrative fees (and UNP) and Emergency Housing Voucher's (EHV) administrative fees and service fees can also be used for eligible activities for addressing LEP requirements for those respective programs.

PIH grantees should consult the competitive grant Notice of Funding Opportunity and/or Grant Agreement to determine the eligible use of funds for meeting LEP requirements.

6. LEP Compliance Monitoring Reviews:

FHEO monitors for program compliance and can issue findings related to programmatic violations to PHAs and PIH grantees that are not in compliance with programmatic requirements. PHAs and PIH grantees should include their LEP policies and procedures in their materials that are readily available for public review, such as on their website and primary office. This information must also be provided to all contracts and subcontracts for compliance, including those contracts and subcontracts under Section 3.

7. **Additional LEP Information:** For additional LEP information, please consult [HUD's webpage on FHEO Limited English Proficiency](#).



Richard J. Monocchio
Principal Deputy Assistant Secretary
Public and Indian Housing



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
WASHINGTON, DC 20410-5000

OFFICE OF PUBLIC AND INDIAN HOUSING

SPECIAL ATTENTION OF:

Office Directors of Public Housing;
Regional Directors; Public Housing
Agencies

NOTICE PIH 2024-05

Issued: February 02, 2024

Expires: This notice remains in effect until
amended, superseded or rescinded.

Cross References: Notice PIH 2023-07 and PIH
Notice 2022-18

Subject: Registration of interest for special administrative fees for development of a housing mobility-related services plan (HMRP) under PIH Notice 2023-07: Implementation of Federal Fiscal Year (FFY) 2023 Funding Provisions for the Housing Choice Voucher Program

1) Background

The Housing Choice Voucher (HCV) program allows participating families to use their assistance anywhere in the country where a Public Housing Agency (PHA) administers vouchers. While the HCV program serves over 2.5 million families with rental assistance, and families may use their assistance anywhere, families may face significant barriers accessing low-poverty neighborhoods.

Recent research shows growing up in neighborhoods with lower levels of poverty improves children's academic achievement and long-term chances of success and reduces intergenerational poverty. Adults given the chance to move to low-poverty neighborhoods may experience reductions in obesity and diabetes. In recognition of this growing evidence base, PHAs have expanded their efforts to promote housing opportunities in a wider range of communities, and especially in low-poverty areas. These activities include increased payment standards in opportunity areas, longer voucher search times, streamlined HCV program operations, and other administrative policies. While current HCV statutory provisions and program regulations¹ allow PHAs to provide housing mobility-related services to HCV families with children, providing these robust services to a large number of families is costly.

HUD has increased its efforts in supporting robust housing mobility programs, through the Community Choice Demonstration (CCD), which is currently supporting comprehensive housing

¹ See PIH Notice 2022-18, "Use of Housing Choice Voucher (HCV) and Mainstream Voucher Administrative Fees for Other Expenses to Assist Families to Lease Units"

mobility programs in eight communities, and a recent \$25 million Notice of Funding Opportunity (NOFO) for Housing Mobility-related Services, which is supporting programs in seven communities.

In preparation for the NOFO issuance, HUD conducted listening sessions with HCV participants, PHAs, advocates, industry groups, and others to learn more about how HUD can help expand housing opportunities for HCV families. During the listening sessions, a common comment was related to the need for adequate time and careful planning to launch a comprehensive housing mobility program and participants encouraged HUD to find ways to fund planning opportunities for PHAs interested in these types of programs.

To further support the expansion of comprehensive housing mobility programs, Section 6(c)(D)(viii) of PIH Notice 2023-07, “Implementation of the Federal Fiscal Year (FFY) 2023 Funding Provisions for the Housing Choice Voucher Program” provided that HUD would issue a notice describing how Public Housing Agencies (PHAs) administering tenant-based Housing Choice Vouchers (HCVs) may apply for special administrative fees to support development of housing mobility-related services plans (HMRP). This notice implements that provision. HUD anticipates making approximately \$1.5 million in HMRP special administrative fee awards, with an estimated award size of approximately \$60,000.

This notice describes the following:

- Planning requirements and uses of special administrative fees
- Financial reporting requirements
- Eligibility criteria
- Registration of interest submission requirements
- Award process

2) Planning Requirements and Uses of HMRP Special Administrative Fees

Planning Requirements

Planning funds are important for helping PHAs launch and implement a successful housing mobility program. Developing a housing mobility plan helps PHAs interested in housing mobility to develop a comprehensive strategy to provide meaningful access to opportunity areas. The overall purpose of these funds is to help ensure that:

- PHAs are prepared prior to implementing housing mobility-related services;
- PHAs analyze the location of voucher holders and areas of opportunity in their jurisdiction and regional housing market;
- PHAs create an actionable and scalable plan for implementing housing mobility-related services, including developing a sustainable funding strategy;
- PHAs explore and adopt administrative policies that promote moves to opportunity areas; and
- PHAs are committed and engaged in the provision of housing mobility-related services.

PHAs that are awarded HMRP funds under this notice must develop a written housing mobility plan, which must include, at a minimum:

- A description of the PHA’s commitment to helping HCV families with children access opportunity areas throughout the regional rental market, including outside the PHA jurisdiction through portability or partnerships;
- Listing of identified opportunity area designations and a map;
- Services to be offered and whether they would be provided in-house or through a third-party provider;
- Target number of families to be served monthly and annually;
- Description of how the PHA will ensure PHA payment standards are adequate in identified opportunity areas;
- Administrative policy changes adopted, or to be adopted, by the PHA that help support and maintain moves to opportunity areas; and
- A discussion of current and potentially available funding sources that could be leveraged to implement the HMRP.

In developing their housing mobility plan, PHAs must engage staff, community partners, and program participants. PHAs may use outside consultants to assist with the development of the plan.² PHAs are encouraged to review the recently published “[Housing Mobility Toolkit](#)” on the HUD Exchange website.

When developing their HMRP, PHAs are reminded that it must follow all applicable nondiscrimination and equal opportunity requirements at 24 CFR 5.105(a) and 24 CFR 982.53, including but not limited to the Fair Housing Act, Section 504 of the Rehabilitation Act of 1973, Title VI of the Civil Rights Act of 1964, the Age Discrimination Act, HUD’s Equal Access Rule, Title II of the Americans with Disabilities Act of 1990, and the Violence Against Women Act. These requirements prohibit discrimination on the basis of race, color, religion, sex (including sexual orientation and gender identity) familial status, national origin, disability, age, and marital status. PHAs must also comply with Title III of the Americans with Disabilities Act of 1990 (see 28 CFR 35.160 and 28 CFR 36.303). Recipients and subrecipients must also provide effective communication for individuals with disabilities. Auxiliary aids or services and reasonable accommodations must be provided to ensure equal participation by individuals with disabilities. Recipients and subrecipients must take reasonable steps to ensure meaningful access for persons with limited English proficiency (LEP) pursuant to Title VI of the Civil Rights Act of 1964 and Executive Order 13166.³

PHAs must submit an interim report, which is a narrative update detailing progress on the housing mobility plan, twelve months after the award, or the mid-point of the anticipated

² Subject to available funding, HUD may offer technical assistance directly to awardees or through its technical assistance providers. HUD may also facilitate a community of practice for HMRP awardees. Participation in technical assistance or the community of practice, if offered, is optional.

³ For assistance in ensuring meaningful access for individuals with limited English proficiency, recipients and subrecipients should consult HUD’s Final Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons (HUD’s LEP Guidance) published in the Federal Register on January 22, 2007 (72 Fed. Reg. 2732).

planning process, whichever is earlier. HUD may issue a specific reporting template for submission of the housing mobility plan and the interim report and will communicate any template via email to the PHA's identified main point of contact. In addition, PHAs may be requested to attend quarterly progress meetings with HUD staff.

PHAs must submit and present their housing mobility plan to their board or equivalent oversight entity for approval. After obtaining board approval, PHAs must submit their written housing mobility plan to HUD. The housing mobility plan must be submitted no later than eighteen months after the award date.

Uses of HMRP Special Administrative Fees

HMRP funds may only be used for the development of a housing mobility plan. The following are eligible uses of these special administrative fees:

- Costs associated with the development of housing mobility plan, including personnel costs, consulting services, resident engagement and other activities that are directly related to the development of the housing mobility plan.
- Costs associated with the development of a Regional Project-based Voucher Plan (RPBVP) as part of the HMRP.
 - A PHA may also, but is not required to, use a limited amount of HMRP funds to develop a RPBVP. A RPBVP is intended to help PHAs expand the use of PBVs in high opportunity neighborhoods in the regional rental market. Ideally, the planning process includes all PHAs administering vouchers in the rental market. For a PHA that chooses to develop a RPBVP, it must be submitted to HUD as part of the housing mobility plan. The RPBVP must include, at a minimum, (1) an analysis of PBV units that are large enough for families with children and are currently in opportunity areas in the region and (2) a strategy for increasing the number of those types of PBV units throughout the region. While drafting their plans, PHAs should analyze barriers to increasing the number of family PBV units in opportunity areas and how to overcome those barriers. PHAs may use no more than 25% of their award toward the development of a RPBVP.

HMRP special administrative fees may only be used for the purposes discussed immediately above. Examples of ineligible uses of HMRP special administrative fees include, but are not limited to:

- Direct mobility-related services or other services provision to program participants
- Incentive payments to landlords
- Administrative purposes of the HCV program unrelated to developing a housing mobility plan for providing meaningful access to opportunity areas
- Housing Assistance Payments (HAP)
- Food or beverages
- Pre-development or development purposes
- Activities not explicitly identified as eligible uses of HMRP special administrative fees.

3) Financial Reporting Requirements

These special administrative fees have a 24-month period of availability. For Financial Data Schedule (FDS) reporting, unlike regular administrative fees, these special administrative fees may not roll into the unrestricted net position (UNP) and must be tracked and accounted for separately throughout the 24-month period of availability.

Similarly, PHAs will report special administrative fee expenditures in the Voucher Management System (VMS) using the Expense/Comments tab and report in Expense Amount Field 5. PHAs will enter the amount of the monthly expenses and add comments describing the eligible activity the funds were used for. The monthly expenses reported in this field will be used to reconcile the special fees and any unspent funds that will be returned to HUD. Contact your FMC Financial Analyst if you have questions about this expense field.

The funding provided through this notice may only be used for the purposes described in this notice. PHAs that do not comply with the requirements of this notice may have their HMRP funding recaptured and reallocated by HUD.

HUD will assess compliance with these requirements by confirming PHAs used not less than the award amount on the eligible uses described in this Notice. Funds not expended within 24 months of the award are subject to recapture and must be remitted to HUD.

HUD may provide additional reconciliation/closeout guidance closer to the end of the period of performance, if considered necessary.

4) Eligibility Requirements

In order to prioritize PHAs with the highest concentration of voucher holders in higher-poverty areas that are most likely to benefit from housing mobility planning, HUD has established specific eligibility requirements to receive the HMRP funds. A listing of eligible PHAs is provided in Attachment A. PHAs are eligible to receive funds if they meet the following criteria:

1. The PHA has at least 400 voucher households with children living in a qualified census tract, AND at least 25 percent of their total number of HCV families with children are living in a qualified census tract⁴; OR
2. The PHA applied for the Community Choice Demonstration or for funding under the Housing Mobility-related Services NOFO (FR-6700-N-87), which prioritized PHAs with high concentrations of voucher holders in high-poverty neighborhoods, subject to the following conditions: A. PHAs participating in the Community Choice Demonstration or that were awarded funds under the Housing Mobility-related Services NOFO (FR-6700-N-87) are not eligible to apply as some of their awards were for the same purpose as the funding available under this Notice; and B. PHAs that withdrew from the Community

⁴ Qualified census tracts, as defined by the Low Income Housing Tax Credit program, must have 50 percent of households with incomes below 60 percent of the area median gross income or have a poverty rate of 25 percent or more.

Choice Demonstration are not eligible to apply as they previously received funds for this purpose.

HUD determined eligible PHAs with an analysis of household data reported through the Information Management System/PIH Information Center (IMS/PIC) as of September 30, 2023. PHAs that are not on the list provided in Attachment A but have program data supporting their eligibility according to the criteria listed above, must notify housingmobility@hud.gov within 14 days of publication of this Notice.

5) Registration of Interest Requirements

HUD will email eligible PHAs a notice of eligibility. The email will be to the PHA executive director based on contact information in the Public and Indian Housing Information Center (PIC).

Upon receipt of the email, if the PHA is interested in being considered for HMRP funds, the PHA must complete the Registration of Interest via the DocuSign program and submit it to HUD. The PHA must certify they will (1) adhere to the planning requirements in this notice and (2) only use these special administrative fees for the eligible purposes in this notice.

PHAs will have 14 business days after receipt of the email to respond to the Registration of Interest. Registrations of Interest received after the deadline will not be considered.

6) Award Process

HUD will review all Registrations of Interest submitted by the deadline. If more Registrations of Interest are received than available funding will support, HUD will prioritize funding for PHAs with high utilization rates. HUD will use the utilization rate based on the higher of the PHA's funding or units utilization percentage. For HCV funding utilization, HUD's calculation will include both authorized budget authority and reserves. The data will be based on the latest available 2023 financial reporting in VMS.

HUD will notify the highest ranking PHAs via email of their award. At that time, HUD will also notify those PHAs not awarded.

7) Paperwork Reduction Act

The information collection requirements contained in this Notice have been approved by the Office of Management and Budget (OMB) in accordance with the Paperwork Reduction Act of 1995 (44 U.S.C. §§ 3501-3520) and have been assigned the following OMB control number – 2577-0169. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless the collection displays a valid control number.

8) Further Information

Questions concerning this notice should be submitted by email to the following Office of Housing Voucher Programs mailbox: housingmobility@hud.gov



Richard J. Monocchio
Principal Deputy Assistant Secretary
Office of Public and Indian Housing

Attachment A: List of Eligible PHAs

PHA Code	PHA Name	Number of Vouchers with a child in a qualified census tract	Leased Vouchers	Percent with Children
AL001	Housing Authority of the Birmingham District	2,056	5,697	36%
AL002	Mobile Housing Board	1,247	3,891	32%
AL006	Housing Authority of the City of Montgomery	1,129	3,075	37%
AL047	The Housing Authority of the City of Huntsville	440	1,618	27%
AL086	Jefferson County Housing Authority	637	2,074	31%
AL125	HA Bessemer	144	529	27%
AL169	The Housing Authority of the City of Prichard	797	2,386	33%
AR002	North Little Rock Housing Authority	515	1,900	27%
CA006	Housing Authority City of Fresno	1,293	6,479	20%
CA023	County of Merced Housing Authority	655	2,180	30%
CA059	Housing Authority of the County Santa Clara	1,018	10,990	9%
CA068	City of Long Beach Housing Authority	911	6,578	14%
CA085	County of Sonoma	99	2,862	3%
CT001	Housing Authority of the City of Bridgeport	1,025	2,860	36%
CT003	Housing Authority of the City of Hartford	879	2,205	40%
CT006	Waterbury Housing Authority	598	2,074	29%
CT051	City of Hartford Housing Authority	995	4,723	21%
DE001	Wilmington Housing Authority	811	2,212	37%
FL002	Housing Authority of the City of St. Petersburg	971	3,278	30%
FL003	Tampa Housing Authority	2,828	10,592	27%
FL011	Housing Authority of the City of Lakeland	265	1,464	18%
FL028	Housing Authority of Pompano Beach	167	782	21%
FL079	Broward County Housing Authority	1,097	5,374	20%
FL119	HA Boca Raton	96	626	15%
GA004	Housing Authority of the City of Columbus	914	2,992	31%
GA006	Housing Authority of the City of Atlanta Georgia	5,200	17,737	29%
GA228	Housing Authority of the City of Jonesboro	408	1,447	28%
GA237	Housing Authority of the County of DeKalb, GA	989	3,871	26%
IL002	Chicago Housing Authority	13,675	51,067	27%
IL003	Peoria Housing Authority	413	1,731	24%
IL004	Springfield Housing Authority	617	1,926	32%
IL022	Rockford Housing Authority	469	1,634	29%
IL024	Housing Authority of Joliet	454	2,174	21%
IL030	St. Clair County Housing Authority	703	2,210	32%
IN003	Fort Wayne Housing Authority	799	2,599	31%

PHA Code	PHA Name	Number of Vouchers with a child in a qualified census tract	Leased Vouchers	Percent with Children
IN015	Housing Authority of South Bend	722	2,153	34%
IN016	Housing Authority of the City of Evansville	745	2,255	33%
IN017	Indianapolis Housing Agency	2,290	6,816	34%
KY001	Louisville Metro Housing Authority	3,090	10,711	29%
LA003	Housing Authority of East Baton Rouge	1,177	3,677	32%
LA005	Housing Authority of the City of Lafayette	591	1,603	37%
LA006	Housing Authority of Monroe	459	1,541	30%
LA270	Housing Authority of Jefferson Parish	890	4,024	22%
MA002	Boston Housing Authority	4,723	15,884	30%
MA005	Holyoke Housing Authority	422	1,572	27%
MA012	Worcester Housing Authority	1,164	3,474	34%
MA024	Brockton Housing Authority	478	1,771	27%
MD015	Housing Authority of Prince Georges County	833	5,597	15%
MD901	MD Dept. of Housing and Community Development	514	2,231	23%
MI001	Detroit Housing Commission	1,332	5,064	26%
MI006	Saginaw Housing Commission	437	1,172	37%
MI045	Plymouth Housing Commission	650	1,918	34%
MI058	Lansing Housing Commission	728	1,913	38%
MI901	Michigan State Housing Development Authority	6,070	28,433	21%
MN001	Public Housing Agency of the City of St Paul	1,588	4,265	37%
MO001	St. Louis Housing Authority	2,016	5,921	34%
MO002	Housing Authority of Kansas City, Missouri	1,774	7,094	25%
MO004	Housing Authority of St. Louis County	2,403	6,140	39%
MO203	St. Francois County Public Housing Agency	449	1,668	27%
MS019	Mississippi Regional Housing Authority No. IV	486	1,933	25%
MS030	Mississippi Regional Housing Authority No. V	466	1,759	26%
MS040	Mississippi Regional Housing Authority No. VIII	1,868	7,006	27%
MS058	Mississippi Regional Housing Authority No. VI	1,378	4,887	28%
NC001	Housing Authority of the City of Wilmington	407	1,313	31%
NC003	Housing Authority of the City of Charlotte	1,773	7,361	24%
NC006	Housing Authority of the City of High Point	447	1,232	36%
NC011	Housing Authority of the City of Greensboro	1,004	4,005	25%
NC012	Housing Authority of the City of Winston-Salem	1,313	3,399	39%
NC057	Gastonia Housing Authority	510	1,436	36%
NE001	Omaha Housing Authority	1,363	4,042	34%
NJ002	Newark Housing Authority	2,284	7,363	31%
NJ003	Elizabeth Housing Authority	259	1,110	23%

PHA Code	PHA Name	Number of Vouchers with a child in a qualified census tract	Leased Vouchers	Percent with Children
NJ912	State of NJ Dept. of Comm. Affairs	3,207	23,327	14%
NY001	Syracuse Housing Authority	1,129	3,512	32%
NY005	New York City Housing Authority	18,399	94,105	20%
NY009	Albany Housing Authority	774	2,447	32%
NY409	City of Buffalo	1,286	4,616	28%
OH001	Columbus Metropolitan Housing Authority	3,497	12,808	27%
OH003	Cuyahoga Metropolitan Housing Authority	3,910	12,830	30%
OH004	Cincinnati Metropolitan Housing Authority	3,563	10,348	34%
OH005	Dayton Metropolitan Housing Authority	1,245	3,864	32%
OH006	Lucas Metropolitan Housing Authority	1,118	3,817	29%
OH007	Akron Metropolitan Housing Authority	1,622	5,154	31%
OH012	Lorain Metropolitan Housing Authority	997	2,903	34%
OH015	Butler Metropolitan Housing Authority	475	1,654	29%
OH016	Mansfield Metropolitan Housing Authority	572	1,732	33%
OH018	Stark Metropolitan Housing Authority	460	1,306	35%
OK002	Housing Authority of the City of Oklahoma City	1,156	3,599	32%
OK073	Housing Authority of the City of Tulsa	1,817	5,808	31%
PA002	Philadelphia Housing Authority	7,249	19,055	38%
PA004	Allentown Housing Authority	458	1,598	29%
PA007	Chester Housing Authority	591	1,579	37%
PA008	Harrisburg Housing Authority	432	1,294	33%
PA023	Housing Authority County of Delaware	677	2,232	30%
RI001	Housing Authority Providence	855	2,362	36%
SC002	Housing Authority of the City of Columbia	1,060	3,852	28%
SC004	Housing Authority of Greenville	767	2,929	26%
SC057	Housing Authority of N Charleston	635	2,222	29%
TN001	Memphis Housing Authority	2,828	7,851	36%
TN003	Knoxville's Community Development Corp.	925	2,959	31%
TN006	Kingsport Housing and Redevelopment Authority	296	1,371	22%
TN007	Jackson Housing Authority	488	1,325	37%
TX006	San Antonio Housing Authority	2,928	10,922	27%
TX008	Corpus Christi Housing Authority	1,118	3,297	34%
TX010	Housing Authority of the City of Waco	690	2,473	28%
TX073	Pharr Housing Authority	170	852	20%
TX433	Arlington Housing Authority	491	3,285	15%
UT003	Housing Authority of the County of Salt Lake	352	2,935	12%
UT004	Housing Authority of Salt Lake City	261	2,804	9%

PHA Code	PHA Name	Number of Vouchers with a child in a qualified census tract	Leased Vouchers	Percent with Children
VA006	Norfolk Redevelopment & Housing Authority	1,170	4,234	28%
VA007	Richmond Redevelopment & Housing Authority	1,065	3,382	31%
VA019	Fairfax County Redevelopment & Hsg Authority	315	4,779	7%
WA054	HA of Pierce County	221	2,518	9%
WI002	Housing Authority of the City of Milwaukee	1,615	5,764	28%

Appendix A
REVISED HCV PROGRAM

(This chart has been revised; the success rate information must be verified before inclusion)
Utilization lease-up percentage rate each month for the following programs:

HCV Program	January	February	March	April	May	June	July	August	September	October	November	December
Total Awarded ACC	5,121	5,121	5,121	5,121	5,121	5,121	5,121	5,121	5,121	5,121	5,121	5,121
Total units Leased	3,855											
Unit Utilization	75%											
Success Rate												

VASH Program	January	February	March	April	May	June	July	August	September	October	November	December
Total Awarded	324	324	324	324	324	324	324	324	324	324	324	324
Total units leased	281											
Unit Utilization	86%											
Success Rate												

Mainstream Voucher	January	February	March	April	May	June	July	August	September	October	November	December
Total Awarded	59	59	59	59	59	59	59	59	59	59	59	59
Total units Leased	59											
Unit Utilization	100%											
Success Rate												

Family Unification	January	February	March	April	May	June	July	August	September	October	November	December
Total Awarded	42	42	42	42	42	42	42	42	42	42	42	42
Total units Leased	43											
Unit Utilization	102%											
Success Rate												

Emergency Housing Voucher	January	February	March	April	May	June	July	August	September	October	November	December
Total Awarded	265	265	265	265	265	265	265	265	265	265	265	265
Total units Leased	270											
Unit Utilization	29%											
Success Rate												

Foster Youth Initiative Voucher	January	February	March	April	May	June	July	August	September	October	November	December
Total Awarded	65	65	65	65	65	65	65	65	65	65	65	65
Total units Leased	7											
Unit Utilization	11%											
Success Rate												

Cumulative Overall, Success Rate: 75% ----- Total Vouchers awarded including Mainstream is: 5,121



Reminder!

March Meetings Rescheduled

Okay

When?!

March 14 - Committee Meetings
March 28 - Regular Board Meeting

Okay



COMMISSIONER COMMENTS

&

ADJOURNMENT



AGENDA
HYBRID BOARD MEETING FOR
THE MONTEREY COUNTY HOUSING AUTHORITY DEVELOPMENT CORPORATION
BOARD OF DIRECTORS

DATE: MONDAY, FEBRUARY 26, 2024

TIME: 6:00 P.M. (Or immediately following the HACM Regular Board Meeting)

LINK: <https://us02web.zoom.us/j/3501891938?pwd=N3d4QWM3MjRQQUtnYnYwZ3dtekxDdz09>

Phone: (669) 900-6833 (*9 to raise hand, *6 to unmute)
Meeting ID: 350 189 1938
Passcode: 438419

LOCATION: Housing Authority of the County of Monterey
Central Office
123 Rico Street
Salinas, CA 93907

ALTERNATE LOCATIONS WITH ZOOM CONNECTON OPEN TO THE PUBLIC:

10855 Ocean Mist parkway, Castroville CA 95012
Kevin Healy's Open Meeting Location

1. CALL TO ORDER

2. ROLL CALL

	<u>PRESENT</u>	<u>ABSENT</u>
Chair Francine Goodwin	_____	_____
Vice Chair Yuri Anderson	_____	_____
Director Kathleen Ballesteros	_____	_____
Director Hans Buder	_____	_____
Director Maria Orozco	_____	_____
Director Kevin Healy	_____	_____
VACANT, Director	_____	_____

3. COMMENTS FROM THE PUBLIC

4. CONSENT AGENDA

Items on the Consent Agenda are considered routine and, therefore, do not require separate discussion. However, if discussion is necessary or if a member of the public wishes to comment

on any item, the item may be removed from the Consent Agenda and considered separately. Questions for clarification may be made by Directors without removal from the Consent Agenda. The Consent Agenda is adopted in one motion.

A. Minutes - Approval of Minutes of the HDC Board Meeting held on January 22, 2024.

5. INFORMATION

- A. Property Management Report
- B. Development Report

6. DIRECTOR COMMENTS

7. ADJOURNMENT

 This agenda was posted on the Housing Authority’s Bulletin Boards at 123 Rico Street, Salinas, CA.
 The Board of Directors will next meet at the Regular Board Meeting on March 28, 2024, at 6:00 p.m.



COMMENTS FROM THE PUBLIC



Per The Ralph M. Brown Act

Opinion: Ribakoff v. City of Long Beach, et al.



ACTION
MINUTES OF THE REGULAR BOARD MEETING OF
THE MONTEREY COUNTY HOUSING AUTHORITY DEVELOPMENT CORPORATION
HELD JANUARY 22, 2024

SUMMARY ACTION MINUTES

1. CALL TO ORDER:

Chair Goodwin called the meeting to order at 7:50 p.m.

2. ROLL CALL:

PRESENT:

Chair Francine Goodwin
Vice-Chair Yuri Anderson
Director Kevin Healy
Director Kathleen Ballesteros
Director Hans Buder
Director Maria Orozco

ABSENT:

Also present: Zulieka Boykin, Executive Director; James Maynard-Cabrera, Director of Human Resources, Michael Underwood, Director of Finance; Mayra Zesati, Asset Manager; Nora Ruvalcaba, Development Analyst; Socorro Vasquez, Sandra Rosales, Ricardo Calderon, Property Management Supervisors. Recorder: Gabriela Rivero

3. COMMENTS FROM THE PUBLIC

None

4. CONSENT AGENDA

Items on the Consent Agenda are considered routine and, therefore, do not require separate discussion. However, if discussion is necessary or if a member of the public wishes to comment on any item, the item may be removed from the Consent Agenda and considered separately. Questions for clarification may be made by Commissioners without removal from the Consent Agenda. The Consent Agenda is adopted in one motion.

A. Minutes - Approval of Minutes of the HDC Board Meeting held on December 18, 2023.

No request to pull items from the Consent Agenda. Upon motion by Director Anderson, seconded by Director Buder, the Board of Directors moved to approve the item listed on the Consent Agenda. The board unanimously carried the motion through a roll call vote:

AYES: Goodwin, Anderson, Ballesteros, Healy, Buder, Orozco

NOES: None

ABSENT: None

5. INFORMATION

A. Property Management Report – Presented by Socorro Vasquez, Property Management Supervisor.

No additional items to report from the HACM meeting.

B. Development Report – Presented by Nora Ruvalcaba, Development Analyst.

No additional items to report from the HACM meeting.

6. COMMISSIONER COMMENTS

Commissioners collectively thanked everyone involved in today’s meeting.

7. ADJOURNMENT

There being no further business to come before the Board, the meeting was adjourned at 7:54 p.m.

Respectfully submitted,

Gabriela Rivero
Executive Assistant/Clerk of the Board

Chairperson

ATTEST:

President/CEO

Date



- A. Property Management Report (Page: 64)
- B. Development Report (Page:80)



DIRECTOR COMMENTS

&

ADJOURNMENT



Reminder!

March Meetings Rescheduled

Okay

When?!

March 14 - Committee Meetings
March 28 - Regular Board Meeting

Okay