

**HASLO has returned to in-person meetings for the Board of Commissioners.****LOCATION: Pacific Western Bank, Conference Room, 997 Monterey St., 3<sup>RD</sup> Floor, San Luis Obispo****The public may join in person or via the Zoom link.**

Join Zoom Meeting:

<https://zoom.us/j/98057177103?pwd=TXljeW5UMVMYTS8rcS81Y0hiUjNOUT09>

Meeting ID: 980 5717 7103

Passcode: 975423

Dial in by phone: 253-215-8782

**12:00 PM****REGULAR MEETING****997 Monterey St.  
3<sup>rd</sup> Floor****CALL TO ORDER:** Chairman Ashlea Boyer**ROLL CALL:** Commissioners Beck, Boyer, Crotser, Gillett, Odenthal, Souza, Steinberg

**PUBLIC COMMENT PERIOD FOR ITEMS NOT ON THE AGENDA** (not to exceed 15 minutes total)  
The Board welcomes your input. You may address the Board by completing a speaker slip and giving it to the staff clerk prior to the meeting. At this time, you may address the Board on items that are not on the agenda. Time limit is three minutes. State law does not allow the Board to discuss or take action on issues not on the agenda, except that members of the Board or staff may briefly respond to statements made or questions posed by persons exercising their public testimony rights (Gov. Code Sec. 54954.2). Staff may be asked to follow up on such items.

**EXECUTIVE DIRECTOR REPORT**

The Executive Director's report is intended to brief the Commission on items, issues, key dates, etc., that do not require specific action, and are not "agendized" as separate items on the HASLO Commission Agenda.

**CONSENT AGENDA**

A member of the public or a Commissioner may request the Board to pull an item for discussion, clarification, and/or separate action. Pulled items shall be heard at the close of the Consent Agenda unless a majority of the Board chooses another time. The public may comment on any and all items on the Consent Agenda within the three-minute time limit.

All items on the Consent Agenda are adopted by one motion.

**RECOMMENDED ACTION: Approve Consent Agenda Items as Presented**

- C1. MINUTES OF THE BOARD OF COMMISSIONERS REGULAR MEETING OF FEBRUARY 16, 2023**  
Approve the Minutes of the Regular Board of Commissioners Meeting of February 16, 2023.
- C2. HASLO MONTHLY DISBURSEMENT REGISTER** (available for review at the meeting)
- C3. HOUSING CHOICE VOUCHER (SECTION 8)**
- C4. VACANCY LOSS REPORT**
- C5. FAMILY SELF-SUFFICIENCY & RESIDENT SERVICES PROGRAM REPORT**
- C6. CONSTRUCTION AND DEVELOPMENT REPORTS**

**DISCUSSION ITEM**

Commissioner Training – Staff will share training opportunities available through HUD Exchange and NAHRO and seek input from the Commission.

**CLOSED SESSION****1. Closed session, pursuant to section 54956.8**CONFERENCE WITH REAL PROPERTY NEGOTIATORS

Property: APN 002-431-007  
 Agency Negotiators: Scott Collins, Executive Director  
 Ken Litzinger, Director of Finance  
 Negotiating Parties: The Housing Authority of the City of San Luis Obispo (HASLO)  
 955 Partnership (not present)  
 Under Negotiation: The Negotiators' authority regarding the price and terms.

**2. Closed session, pursuant to section 54956.8**CONFERENCE WITH REAL PROPERTY NEGOTIATORS

Property: APN 003-625-015  
 Agency Negotiators: Scott Collins, Executive Director  
 Ken Litzinger, Director of Finance  
 Negotiating Parties: The Housing Authority of the City of San Luis Obispo (HASLO)  
 Sandercock Storage (not present)  
 Under Negotiation: The Negotiators' authority regarding the price and terms.

**ADJOURNMENT**

The next Regular Meeting will be held on April 20, 2023, at 12:00 p.m. location to be determined.

**REQUIREMENTS OF THE BROWN ACT HAVE BEEN SATISFIED AS THIS NOTICE WAS POSTED AT 5:00 P.M. ON MARCH 8, 2023, PRIOR TO THE 72-HOUR NOTICING REQUIREMENT.**



HASLO wishes to make all of its public meetings accessible to the public. Upon request, this agenda will be made available in appropriate alternative formats to persons with disabilities. Any person with a disability who requires a modification or accommodation in order to participate in a meeting should direct such request to the Executive Director's Assistant at (805) 594-5321 at least 48 hours before the meeting, if possible.

**\*\* DRAFT \*\***

**MINUTES**

**HOUSING AUTHORITY OF THE CITY OF SAN LUIS OBISPO**

**February 16, 2023**

**CALL TO ORDER**

The Regular Meeting of the Housing Authority of the City of San Luis Obispo was called to order on Thursday, February 16, 2023, at 12:06 p.m. at 738 Higuera Street, San Luis Obispo, by Chair Ashlea Boyer.

**ROLL CALL**

**PRESENT:** Commissioners Beck, Boyer, Crotser, Odenthal, Souza, Steinberg  
**ABSENT:** Commissioner Gillett  
**STAFF:** Michelle Pedigo, Ken Litzinger, Sandra Bourbon, Michael Burke, and Vicky Culman

**PUBLIC COMMENT:**

No public.

**EXECUTIVE DIRECTOR'S REPORT:**

Michelle Pedigo, Interim Executive Director, reported:

- 1) The office move is on track for February 21<sup>st</sup> and 22<sup>nd</sup>. The server and phones were moved previously so there will be no down time. Section 8 will stay at its current location.
- 2) The current funding of vouchers is unprecedented. We need to maximize this year's allotment because next year may be less.
- 3) HASLO closed with the owners on the Anderson hotel yesterday. On March 27 we will close with our TCAC investor.
- 4) Sandercock Storage is up for sale. HASLO was contacted about putting in an offer first, but they are now considering other offers. The site could be used for more office space or affordable housing. We are proceeding with due diligence and will bring back to the Commissioners if we decide to make an offer.
- 5) Scott Collins, the new Executive Director, stopped by HASLO offices this week.

**CONSENT AGENDA:**

- C1. MINUTES OF THE BOARD OF COMMISSIONERS REGULAR MEETING OF JANUARY 19, 2023**
- C2. HASLO MONTHLY DISBURSEMENT REGISTER (available for review at the meeting)**
- C3. HOUSING CHOICE VOUCHER (SECTION 8)**
- C4. VACANCY LOSS REPORT**
- C5. FAMILY SELF-SUFFICIENCY & RESIDENT SERVICES PROGRAM REPORT**
- C6. CONSTRUCTION AND DEVELOPMENT REPORT**

Commissioners and staff discussed Paso Homekey Phase 3 renovations, HQS inspections, the HAP analysis, and the Shell Beach project. Regarding the HAP analysis, Ken Litzinger, Director of Finance, explained that we are intentionally operating with a shortfall for the first two months of the year because we had higher than benchmark reserves. There was also discussion regarding orientation board members.

**ACTION TAKEN:** A motion to approve all Consent Agenda items was made by Commissioner **Beck**, seconded by Commissioner **Steinberg**, and unanimously approved by the Commissioners present.

## COMMISSION MEETING

February 16, 2023

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**DISCUSSION ITEMS:****1. AUTHORIZED SIGNERS**

The new Executive Director, Scott Collins, is being added as an authorized signer for HASLO effective March 6, 2023.

**ACTION TAKEN:** A motion to adopt **Resolution No. 4 (2022 Series) Authorizing Signers on behalf of the Housing Authority of the City of San Luis Obispo (HASLO) and All Partnerships and Limited Liability Companies where HASLO is the Manager or Managing General Partner** was made by Commissioner **Boyer**, seconded by Commissioner **Souza**, and unanimously approved on the following roll call vote:

**AYES:** Commissioners **Boyer, Souza, Beck, Crotser, Odenthal, Steinberg**  
**NOES:** **None**  
**ABSENT:** **Commissioner Gillett**  
**ABSTAINED:** **None**

**2. ANDERSON HOTEL APARTMENTS**

Litzinger explained that the Resolution 5 authorizes HASLO to work with SLONP on a partnership, and Resolution 6 maintains the property as affordable. Commissioners and staff discussed the commercial spaces at the Anderson which will remain under HASLO only.

**ACTION TAKEN:** A motion to adopt **Resolution No. 5 (2023 Series) Authorizing Resolutions RE: Anderson Apartments, L.P.** was made by Commissioner **Crotser**, seconded by Commissioner **Souza**, and unanimously approved on the following roll call vote:

**AYES:** Commissioners **Crotser, Souza, Boyer, Beck, Odenthal, Steinberg**  
**NOES:** **None**  
**ABSENT:** **Commissioner Gillett**  
**ABSTAINED:** **None**

**ACTION TAKEN:** A motion to adopt **Resolution No. 6 (2023 Series) Authorizing Resolutions RE: Purchase and Leasing of Land, Sponsor Loan, Homekey Grant, and Guarantying the Financing of Anderson Apartments, L.P.** was made by Commissioner **Crotser**, seconded by Commissioner **Souza**, and unanimously approved on the following roll call vote:

**AYES:** Commissioners **Crotser, Souza, Boyer, Beck, Odenthal, Steinberg**  
**NOES:** **None**  
**ABSENT:** **Commissioner Gillett**  
**ABSTAINED:** **None**

12:43 P.M. Chair **Boyer** announced we were going into closed session.

12:43 P.M. **Sandra Bourbon** now absent.

**COMMISSION MEETING**

**February 16, 2023**

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**CLOSED SESSION:**

**Closed session, pursuant to section 54956.8**

**CONFERENCE WITH REAL PROPERTY NEGOTIATORS**

Property: APN 002-431-007  
Agency Negotiators: Michelle Pedigo, Interim Executive Director  
Ken Litzinger, Director of Finance  
Negotiating Parties: The Housing Authority of the City of San Luis Obispo (HASLO)  
955 Partnership (not present)  
Under Negotiation: The Negotiators' authority regarding the price and terms.

**12:58 P.M. Chair Boyer announced that the closed session had ended and we were back in regular session.**

There being no further business, the meeting was adjourned at 12:58 p.m.

Respectfully submitted,

Michelle Pedigo, Secretary

## Executive Summary

### Housing Choice Vouchers (“Section 8”)

- SEMAP Report
  - The closing for PIC was successful for the month of February and the SEMAP report is attached.
- Voucher Lease-up Activity
  - The last 6 months have been busy with intake and new leases.

50058 Listing

Property: .vo

Action Effective Date : 09/01/2022-02/28/2023

Rows By: Property

Columns By: Month

Property	09/2022	10/2022	11/2022	12/2022	01/2023	02/2023	Total
Emergency	11	7	9	7	5	2	41
Foster Youth	0	1	0	0	0	1	2
Mainstream	8	4	7	2	4	1	26
Veterans	1	1	5	1	2	2	12
Housing Choice	14	23	16	13	17	5	88
	34	36	37	23	28	11	169



- Emergency Housing Vouchers
  - The total voucher award is 196 vouchers. Lease-up over the last 12 months is as follows:

#### 12 Month

#### Voucher Trend Analysis

Property: .ehv

Ending Date: 02/01/23

#### Distribution of Vouchers by Voucher Bedroom Size

	1	2	3	4	5	Total Vouchers
02/01/23	82	57	36	6	1	182
01/01/23	81	55	34	6	1	177
12/01/22	81	53	36	6	1	177
11/01/22	79	52	35	6	1	173
10/01/22	78	50	31	6	1	166
09/01/22	77	47	30	6	1	161
08/01/22	77	47	30	6	0	160
07/01/22	72	46	27	6	0	151
06/01/22	69	45	27	5	0	146
05/01/22	69	47	25	6	0	147
04/01/22	70	47	27	6	0	150
03/01/22	73	47	27	6	0	153
<b>Total</b>	<b>908</b>	<b>593</b>	<b>365</b>	<b>71</b>	<b>6</b>	<b>1,943</b>

- Mainstream Vouchers
  - We have started the intake on the new allotment of mainstream vouchers
  - We expect that it may take up to 6 months to fully lease-up the award of 30 additional vouchers

## 12 Month

### Voucher Trend Analysis

Property: v-main

Ending Date: 02/01/23

#### Distribution of Vouchers by Voucher Bedroom Size

	0	1	2	3	4	Total Vouchers
02/01/23	4	113	33	9	1	160
01/01/23	4	115	30	10	1	160
12/01/22	4	114	29	10	1	158
11/01/22	4	116	27	9	1	157
10/01/22	4	114	25	9	1	153
09/01/22	4	111	24	9	1	149
08/01/22	5	111	23	7	1	147
07/01/22	5	111	21	6	1	144
06/01/22	5	108	22	5	1	141
05/01/22	5	107	22	4	1	139
04/01/22	5	110	23	4	1	143
03/01/22	5	113	24	3	1	146
<b>Total</b>	<b>54</b>	<b>1,343</b>	<b>303</b>	<b>85</b>	<b>12</b>	<b>1,797</b>

- The lease-up was disappointingly low for the month of February, but perhaps that is a seasonal challenge- I compared it to last February and it was also a lower than the typical month for lease-up

## SEMAP Indicators Report

As of December 31, 2022

Housing Authority: **CA064**  
Housing Authority FYE: **September 30**

### Current SEMAP Indicator Information

### Most Recent SEMAP Indicator Information

#### Reporting Rate as of December 31, 2022

Program Type	VMS Units Leased	As of MM/YY	Port-Outs	Port-Ins	Number of 50058s Required (#)	Number of 50058s Reported (#)	Reporting Rate (%)
All Voucher Funded Assistance	2396	11/22	14	22	2404	2608	100

### Indicator 9: Annual Reexaminations

Note: For Indicators 9-12 and 14, HUD mandates for SEMAP a Reporting Rate of at least 95 percent by the PHA's fiscal year end. If this threshold is not met, the PHA will receive zero points for these four indicators.

Percent of Families with reexaminations overdue (%) (Percentage includes all reexaminations more than 2 months overdue. SEMAP scores: Under 5% = 10 points; 5% - 10% = 5 points; greater than 10% = 0 points. Percentages shown as red and bold result in reduced SEMAP scores.)

0

### Number of Families in Current Database

2793

### Number of Late Reexaminations

6 – data submission issues plus 1 tenant in process of being evicted by the LL

#### [+] Families with reexaminations overdue

### Indicator 10: Correct Tenant Rent Calculations

Percent of Families with incorrect rent calculation (%) (SEMAP scores zero points when more than 2% of the Housing Authority's tenant rent calculations are incorrect as indicated by percentages shown in red & bold.)

0

### Number of Families in Current Database

1488

### Number of Rent Discrepancies

0

#### [+] Families with incorrect rent calculation(s)

### Indicator 11: Precontract HQS Inspections

Percent of units that did pass HQS inspection before the beginning date of the assisted lease and HAP contract (%) (SEMAP scores zero points when fewer than 98 percent of newly leased units pass the HQS inspection before the beginning of the lease/HAP as indicated by percentages as shown in red and bold.)

100

### Number of Families in Current Database

673

### Number of Inspections On or Before Effective Date

673

#### [+] Families where HQS inspection did not pass before lease and HAP contract



**Indicator 12:  
Annual HQS Inspections**

Percent of units under contract where annual HQS inspection is overdue (%). (Percentage includes all HQS Inspections more than 2 months overdue. SEMAP scores: Under 5% = 10 points; 5% - 10% = 5 points; greater than 10% = 0 points. Percentages shown as red and bold result in reduced SEMAP scores.) **1**

Number of Families in Current Database	Number of Late Inspections
2233	23 – audited the list of inspections – 2 are late, 3 are in process of terminations with cause for program violations; balance are data entry/timing issues with HUD’s system

**[-] Families with annual HQS inspections overdue:**

**Indicator 13:  
Lease-Up**

**Note: This data is not currently available.**

**Indicator 14:  
Family Self-Sufficiency Enrollment**

Enrolled	Escrow Balance	Points
80% or more	30% or more	10
60%-79%	30% or more	8
80% or more	Less than 30%	5
Less than 60%	30% or more	5
60%-79%	Less than 30%	3
Less than 60%	Less than 30%	0

Percentages shown in red and bold result in reduced SEMAP scores.

Number of Mandatory Slots (#)*	Number of Families Enrolled (#)	Percent of Families Enrolled (%)	Number of Families with Progress Report and Escrow Balances (#)	Percent of Families with Progress Report and Escrow Balances (%)
0	70	<b>0</b>	48	80

**[+] Families enrolled in Voucher FSS Program**

**[+] Families completing FSS Contract**

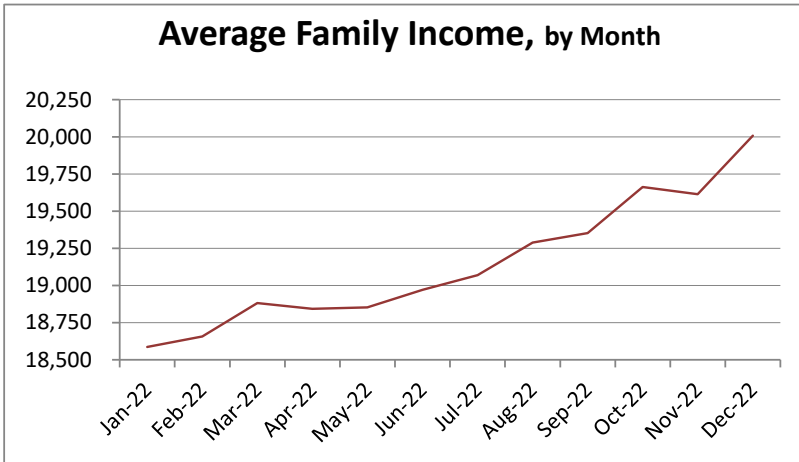
\* - As reported by the PHA in Indicator 14 (a) from the last SEMAP Certification and confirmed by the Field Office. This number may have decreased as families have graduated from the program. Also data may not include approved exceptions to mandatory slots.

# HASLO

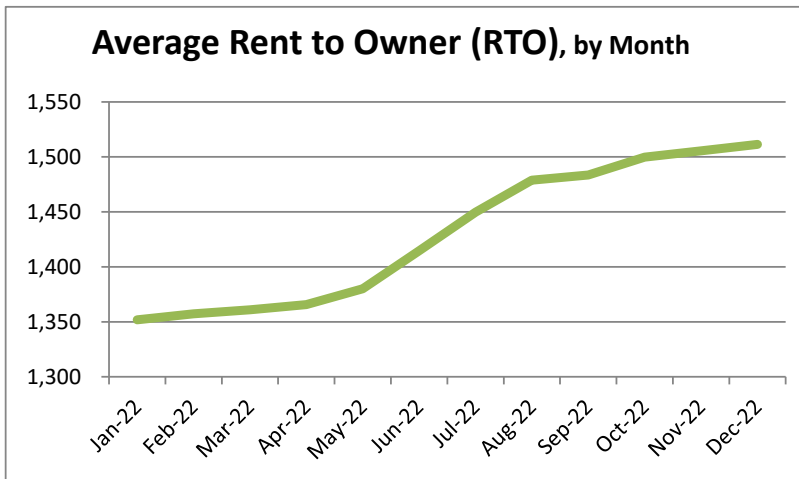
## Voucher Monthly Analysis (VMA)

### Rolling 12 months

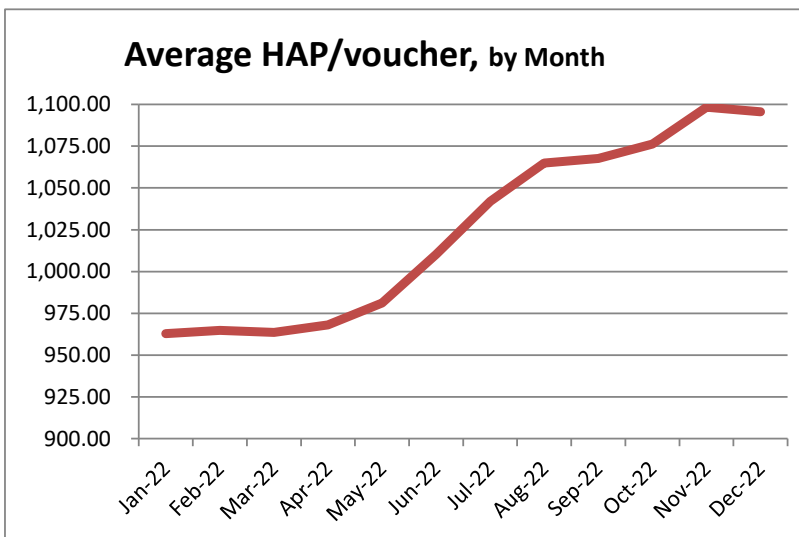
Note: includes Welcome Home Vouchers (EHV)



Average HH Income, 12 month % change: 7.6%



RTO, 12 month % change: 11.8%  
 (including new leases)  
 FMR Increase, as of 10/1/2021 (Fair Market Rents) 13.4%



Average HAP, 12 month % change: 13.8%

**Notes:**

- average HAP/voucher may differ from Finance submissions to HUD, due to timing/reporting differences
- represents averages across the programs/voucher types

**Housing Authority of San Luis Obispo**  
**Housing Choice Voucher Lease up and Funding Analysis**  
**March 2023**

The summary at the top of the page shows the year-to-date leasing activity for our “Regular” Housing Choice Voucher program. The Regular vouchers are comprised of 2,222 general vouchers, 226 Veterans vouchers, and 47 Family Unification/Foster Youth Initiative vouchers for a total of 2,495 available vouchers. In addition, HASLO administers 183 Mainstream and 196 Emergency Housing Vouchers (EHV) that HUD considers as separate stand-alone programs for tracking and funding purposes.

We are projecting that the Average Housing Assistance Payment (HAP) will increase materially as landlords become aware of the increases to the HASLO payment standard and request rent increases. The rental market continues to be very competitive, which is resulting in increasing market rents. We were notified that we received a net of \$113,267 in set aside funding for the following categories: Portability, Project-Based Vouchers, and VASH. HUD released an estimated 7.6% inflation factor for our 2023 funding. We expect that we will receive our 2023 funding numbers within the next month.

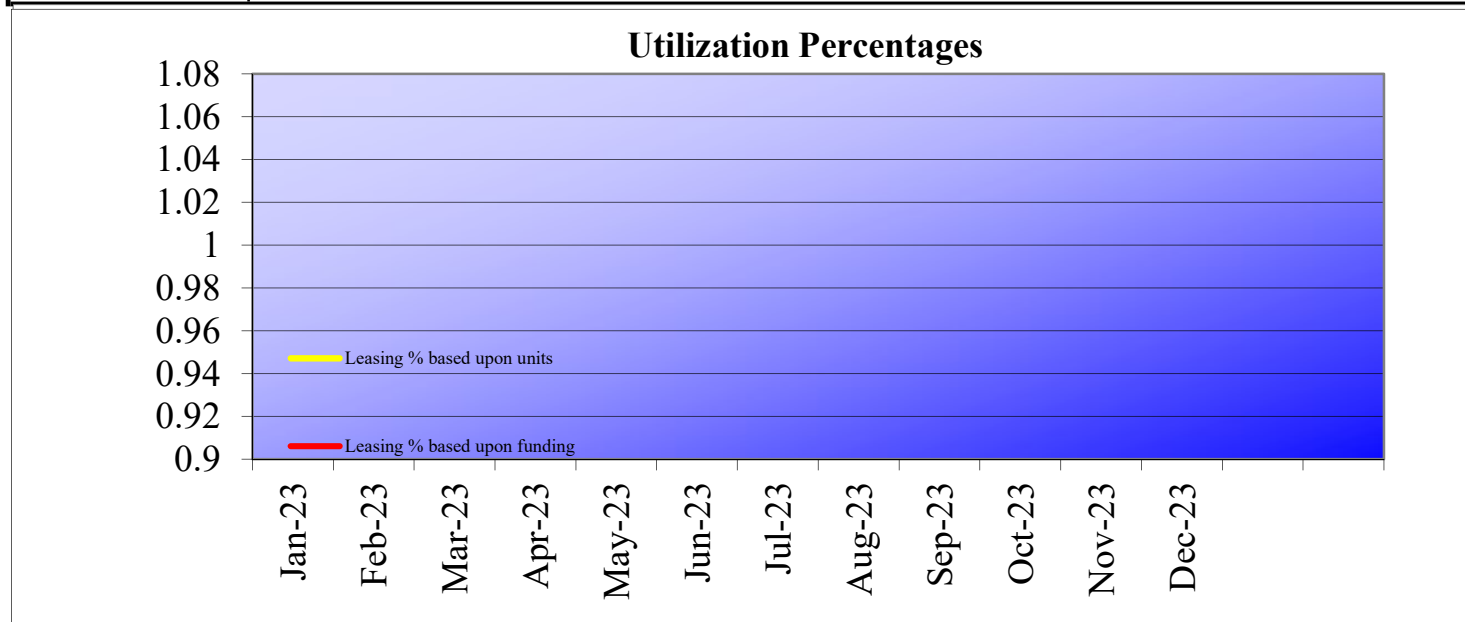
In March we made retroactive HAP payments for tenants at Paso HomeKey for the months of August 2022 to March 2023. This is causing our lease-up numbers and HAP expense to be unusually high.

The Mainstream voucher program continues to have strong leasing numbers.

Reserves remain strong at around \$2.05 million, which allow us to maintain a high lease up through the first half of the year.

**Housing Authority San Luis Obispo  
HCV Leasing Financial Analysis  
March 2023**

	Unit Months Available	Unit Months Leased	Leasing % based upon units	ABA /HAP Funding Allocation	HAP Expenses Paid	Funding Surplus / (Shortfall)	Leasing % based upon funding	Per Unit HAP
January 2023	2,495	2,399	96.15%	\$ 2,631,046	\$ 2,666,752	\$ (35,706)	101.36%	\$ 1,112
February 2023	2,495	2,430	97.39%	\$ 2,631,046	\$ 2,644,592	\$ (13,546)	100.51%	\$ 1,088
March 2023	2,495	2,587	103.69%	\$ 2,631,046	\$ 2,868,366	\$ (237,320)	109.02%	\$ 1,109
April 2023								
May 2023								
June 2023								
July 2023								
August 2023								
September 2023								
October 2023								
November 2023								
December 2023								
<b>YTD</b>	<b>7,485</b>	<b>7,416</b>	<b>99.08%</b>	<b>\$ 7,893,137</b>	<b>\$ 8,179,710</b>	<b>\$ (286,573)</b>	<b>103.63%</b>	<b>\$ 1,103</b>



NRA + Prog Reserve Balance (Excess HAP) as of 1/1/2023	\$ 2,340,993	YTD Voucher	YTD	
HAP Funding YTD:	\$ 7,893,137	Months Available	Vouchers Leased	
HAP Expenditures YTD:	\$ 8,179,710			
HAP Revenue (Fraud, FSS Forfeits) YTD:	\$ -	Regular Vouchers	6,666	6,747 101.2%
Current Remaining NRA / Prog Reserve:	\$ 2,054,420	Veterans (VASH)	678	556 82.0%
Months in Reserves at Current Monthly Expense Levels		Family Unification	141	113 80.1%
Reserves as a Percentage of Budget Authority	6.5%	Total Vouchers	<u>7,485</u>	<u>7,416</u> 99.1%
Current Monthly Funding (a)	\$ 2,631,046			
Current Average HAP Payment (b)	\$ 1,109	Mainstream	549	503 91.6%
# of Units the Current Monthly Funding Would Support (a)/(b)	2,373	Emergency Housing	588	547 93.0%
# of Units Currently Leased	2,587			
Excess Units Leased, Current Month	214			
Current Year-to-Date Funding (a)	\$ 7,893,137			
Current Year-to-Date Average HAP Payment (b)	\$ 1,103			
# of Unit-Mos the Current Monthly Funding Supports (a)/(b)	7,156			
# of Unit-Mos Leased Year-to-Date	7,416			
Excess Unit-Mos Leased, Year-to-Date	260			

<b>Vacancy Summary as of 12/31/22</b>										
	<u>Vacancy Loss</u>		<u>GPR</u>	<u>Budgeted %</u>		<u>Avg Days Vacant</u>	<u>% Annual Turnover</u>	<u># of Units Turned</u>	<u>Total Units</u>	<u>% Occupied as of 12/31</u>
	<u>Current Month</u>	<u>Vacancy Loss Rolling 12 Month</u>		<u>of GPR</u>	<u>% of GPR</u>					
<b>**NOTE: All day counts include weekends**</b>										
<b><u>Tax Credit Properties</u> (rolling 12 months)</b>										
860 on the Wye	\$0	\$1,592	\$250,620	0.97%	0.64%	45	10%	2	20	100%
Atascadero	\$0	\$7,069	\$246,031	0.88%	2.87%	68	16%	3	19	100%
Bishop Street Studios	\$0	\$2,952	\$486,660	1.78%	0.61%	54	3%	1	33	100%
Brizzolara	\$0	\$16,091	\$398,496	0.45%	4.04%	79	17%	5	30	100%
Carmel	\$0	\$3,069	\$260,868	0.91%	1.18%	45	5%	1	19	100%
Courtyard	\$2,418	\$9,363	\$577,884	2.00%	1.62%	34	26%	9	35	100%
DRT (Johnson)	\$0	\$4,629	\$562,044	0.40%	0.82%	33	13%	5	40	98%
Halcyon	\$0	\$1,709	\$261,960	2.00%	0.65%	64	0%	0	20	100%
Hidden Creek	\$0	\$4,868	\$1,162,920	0.40%	0.42%	22	11%	9	80	100%
Ironworks	\$1,971	\$10,207	\$796,982	4.54%	1.28%	47	7%	3	46	98%
RAD175/SLO Villages	\$3,647	\$18,514	\$2,804,988	5.00%	0.66%	30	9%	16	175	100%
Islay Hills (Ironbark)	\$0	\$10,090	\$292,884	0.29%	3.45%	77	15%	3	20	100%
Laurel (Marvin Gardens)	\$0	\$3,897	\$331,956	0.29%	1.17%	58	8%	2	24	100%
Pismo Buchon	\$1,155	\$10,443	\$163,992	0.29%	6.37%	94	36%	4	11	91%
Willow Walk	\$0	\$1,649	\$744,048	5.00%	0.22%	13	8%	3	39	100%
<b>Total, Tax Credit Properties</b>	<b>\$9,191</b>	<b>\$106,142</b>	<b>Average=</b>	<b>1.68%</b>	<b>1.73%</b>	<b>51</b>	<b>13%</b>	<b>4</b>		<b>99%</b>
<b><u>SLONP Properties</u> (rolling 12 months)</b>										
Blue Heron	\$0	\$432	\$241,848	2.94%	0.18%	17	14%	2	14	100%
Empire	\$0	\$0	\$173,400	1.00%	0.00%	-	0%	0	13	100%
Ferrell	\$0	\$0	\$187,200	2.07%	0.00%	-	0%	0	8	100%
Macadero	\$1,909	\$26,934	\$328,200	2.58%	8.21%	99	37%	7	19	95%
Margarita	\$0	\$125	\$345,360	2.52%	0.04%	9	5%	1	21	100%
<b>Total, SLONP Properties</b>	<b>\$1,909</b>	<b>\$27,491</b>	<b>Average=</b>	<b>2.22%</b>	<b>1.68%</b>	<b>41</b>	<b>11%</b>	<b>2</b>		<b>99%</b>
<b><u>EIHC Properties</u> (rolling 12 months)</b>										
Poinsettia	\$0	\$10,858	\$448,488	3.56%	2.42%	63	15%	3	20	100%
<b>Total, EIHC Properties</b>	<b>\$0</b>	<b>\$10,858</b>								
<b><u>50059/Other Properties</u> (rolling 12 months)</b>										
Dan Law	\$0	\$0	\$131,400	2.54%	0.00%	-	0%	0	9	100%
Parkwood	\$0	\$18,314	\$639,948	4.00%	2.86%	80	12%	4	34	100%
<b>Total, 50059/Other Properties</b>	<b>\$0</b>	<b>\$18,314</b>	<b>Average=</b>		<b>1.43%</b>	<b>80</b>	<b>6%</b>	<b>2</b>		<b>100%</b>
	<b>\$11,100</b>	<b>\$162,805</b>	<b>Overall Average=</b>		<b>1.79%</b>	<b>51</b>	<b>12%</b>	<b>4</b>		<b>94%</b>
prior month	\$16,488		<b>Prior Month Overall=</b>		<b>1.90%</b>	<b>54</b>	<b>14%</b>	<b>4</b>		<b>92%</b>
% increase/(decrease)	-33%		<b>net change</b>		<b>-0.11%</b>	<b>-3</b>	<b>-2%</b>	<b>0</b>		<b>2%</b>



March 6, 2023

To: HASLO Board of Commissioners  
 From: Sandra Bourbon, Director of Resident Services  
 Re: February 2023

**Family Self Sufficiency Program (FSS):**

Continued outreach, case management and annual assessments. The below chart is as of 02-28-2023 (2022 FSS grant).

	<b>Sandra</b>	<b>Traci</b>	<b>TOTAL</b>
<b>Active</b>	34	37	71
<b>New contracts added this month</b>	1	0	1
<b>Graduates this grant period</b>	0	0	0
<b>Terminated for Non-Compliance / Contract Expired / Voluntary Withdrawal within this grant period</b>	0	0	0
<b>Active participants who have ported out this grant period</b>	0	0	0
<b>Increase in Earned Income this month</b>	581,239	353,687	934,926
<b>Increase in Tenant Payment (TTP) this month</b>	13,242	7,509	20,751
<b>Total Escrow Accounts</b>	29	23	52
<b>New Escrow Accounts this grant period</b>	0	2	2
<b>Percentage of participants with an Escrow Account this month</b>	85.29%	62.16%	73.24%
<b>Total Escrow Account balance</b>	228,659.67	105,003.13	333,662.80
<b>Total of Escrow Account funds paid out to FSS Graduates for this grant period</b>	0.00	0.00	0.00
<b>Forfeited Escrow Balance 2022</b>	2,496	0.00	2,496
<b>Forfeited Escrow Balance 2023</b>	0.00	0.00	0.00
<b>Total Forfeited Escrow Account Balance</b>			2,496

**\*FSS Graduates (2023):**

**\*FSS Terminations and Forfeited Escrow (2023):**

(2022: E.J-R/11-01-2022 FSS contract expired and unemployed \$2,496)

**SERVICES:**

Active recruitment for the Resident Services Assistant vacancy.

Continued combination of onsite and remote activities at our family and senior complexes. A few February highlights: \$50 "From the Heart" grocery gift cards for every household at Willow Walk & Hidden Creek. Gift cards will be given as a welcomed surprise & distributed by March 31<sup>st</sup>. Resident Services has been supporting PHK's new monthly food distribution in collaboration with the SLO Food Bank. Wilshire Hospice presented a Grief & Loss class at Atascadero Senior Housing and we are in the process of scheduling a presentation at Marvin Gardens.





## Development Update

Date of Update		3/7/2023	
DEVELOPMENT			
PROJECT	ACTION	NOTES/GOALS	
Anderson Hotel	Feasibility	Tank closure permit work has been completed. Closure letter issued by SLO City Fire Blach submitted a bid for 31 million. Working to revise scope to meet the proforma goal of 23.5 million	
	Delivery	Design/build or Design/assist, shortened feasibility period and technical difficulty does not allow for traditional design-bid-build	
	Financing	All financing has been committed to the project Merritt Capital has been selected as the Investor	
	Relocation	Mannikins Tailoring will be permanently displaced. T-Mobile is working to remove their infrastructure from the roof	
	Construction	NTP to be issued for 3/28	
Project HomeKey	Construction	Phase 3 plumbing work to be completed in building B by end of the month. Working with ECHO and PM on sequencing of the remaining work	
Cleaver Site, Grover	Strategy	Partnership with PSHHC for 53 units of affordable housing	
	Entitlements	Fully Entitled, City Council approved the project on 12/13/2021	
	Financing	PSHHC received Super NOFA award. TCAC app expected April of 2023	
1422 & 1480 Monterey	Acquisition	Escrow closed on 1/11/2021	
	Strategy	Partnership with Jim Rendler, 100+ units of mixed-use housing. JB Enterprises to management the commercial tenants	
	Entitlements	Project is fully entitled	
Toscano Site	Construction	Project broke ground on 1/10 Buildings 4 and 5 have received plaster color coat and paint Project is on budget, two of the buildings have slipped on the schedule due to design delays and switchgear delays	
Office	Logistics	Some staff have relocated to the Laurel Lane space HASLO plans to partner with Jim Rendler for the Sandercock Beach Street site which will add housing and additional office square footage	
	Design Development	Plans are in plan check	
	Construction	Bid received from Abbott Reed for 8.4 million. The start has been paused for financial assessment	
2655 Shell Beach Road	Construction	Project is underway, some offsite utilities have been completed and footings have been dug	
405 Atascadero Road	Construction	Preparing to finish improvements on Rockview, weather permitting Drywall and finish work is underway Delay with switchgear will delay the occupancy of the project, project will defer some developer fee due to prolific archeological findings and ROW conflicts	
736 Orcutt Road	Strategy	40+ units of special needs housing, built around the old house	
	Entitlements	Project is approved	
	Financing	TCAC application planned for April 2023, submitting local funding applications	
2690 Victoria	Strategy	A redesign has been authorized for the project to serve either senior, special needs, or other SRO populations	
	Entitlements	Under new zoning regs, we will apply for Director Action. This aims to be a streamlined approach	
	Financing	TCAC application planned for 2024	
700 N. Oak Park	Strategy	63 units of large family mixed use housing	
	Entitlements	Fully approved	
	Financing	Needs additional funding, tax credit application planned for 2023	

279 Bridge Street		
	Strategy	94 units of large family/senior mixed use housing
	Financing	Phased TCAC applications beginning in 2023
	Permitting	Phase 1 has been submitted to the Building Department for review
Empire Apartments		
	Strategy	Renovate the existing 13 units and add 19 units
	Entitlements	Approved at Planning Commission on 7/20/2021
	Financing	TCAC application planned for 2025
Macadero Apartments		
	Strategy	Renovate the existing 19 units and add 6 units
	Entitlements	Unanimously approved at Planning Commission on 9/7/2021
	Financing	TCAC application planned for 2025
Mesa Trails Nipomo		
	Strategy	Partnership with Abbott   Reed to develop a 10 acre neighborhood of mixed-income rental housing of which, 70 doors will be for low income people.
	Entitlements	CUP application has been submitted, incomplete letter received. Responding to comments Community Outreach is in process



405 Atascadero Road



Toscano



# HASLO Development Outlook

Month	March	April	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.
Anderson Hotel Reno 9% 68 Units Special Needs	Tax Credit Award/Closing											
	Permitting											
	Construction											
405 Atascadero 9% 36 Large Family Units	Construction Phase											
	Lease-Up											
	Qualified Occupancy											
Toscano 9% 38 Large Family Units	Construction Phase											
	Lease-Up											
	Qualified Occupancy											
Office	Discuss feasibility											
	Construction Phase											
Shell Beach Road 9% 26 Senior Units	Construction Phase											
Oak Park 9% 68 Large Family Units	Raise Funding/Tax Credit Application						Tax Credit Award/Closing					
Bridge Street 9% 94 Senior/Large Family Units	Raise Funding/Tax Credit Application						Tax Credit Award/Closing					
1422 Monterey 9% 105 Senior/Large Family Units	Raise Funding/Tax Credit Application											
736 Orcutt 9% 40 Special Needs Units	Raise Funding/Tax Credit Application						Tax Credit Award/Closing					
Frontage 4% 70 Senior/Family Units	Concepts Discussed/PSA											
	Entitlements											
						Raise Funding/Tax Credit Application						
Victoria Yard Site 9% 30+ Large Family Units	Entitlements											
PHK Shelter/Perm Housing	Construction Phase											
						Lease-Up						



