

HASLO has returned to in-person meetings for the Board of Commissioners.

LOCATION: Office Hours, 1150 Laurel Lane, Suite 180, San Luis Obispo, CA 93401

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

TIME: 12:00 P.M.

12:00 PM	ANNUAL MEETING	1150 Laurel Lane, Suite 180 Office Hours Conference Room
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CALL TO ORDER: Chairman Ashlea Boyer

ROLL CALL: Commissioners Boyer, Crotser, Jeffries, Odenthal, Shower, 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.

DISCUSSION ITEMS: Part I

1. ELECTION OF OFFICERS – HASLO CHAIR AND VICE CHAIR ARE ELECTED EACH YEAR AT THE JANUARY MEETING

RECOMMENDED ACTIONS:

Adopt Resolution No. 7 (2024 Series) Electing Chair and Vice Chair of the Housing Authority of the City of San Luis Obispo

Adopt Resolution No. 8 (2023 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

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 NOVEMBER 16, 2023, AND THE SPECIAL MEETING OF DECEMBER 7, 2023

Approve the Minutes of the Regular Board of Commissioners Meeting of November 16, 2023, and the Special Meeting of December 7, 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. SUPPORTIVE HOUSING PROGRAM REPORT

C7. CONSTRUCTION AND DEVELOPMENT REPORT

DISCUSSION ITEMS: Part II

2. ADDING SIGNERS AND TRUSTEES FOR RETIREMENT ACCOUNTS

Signers for our Trustees and Retirements account(s) needs to be updated.

RECOMMENDED ACTION: Adopt Resolution No. 9 (2024 Series) Authorizing Signers and Trustees for Retirement account(s)

3. HASLO UTILITY ALLOWANCE FOR HOUSING CHOICE VOUCHER PROGRAMS

Staff report is attached.

RECOMMENDED ACTION: Adopt Resolution No. 10 (2024 Series) Approving Utility Allowances for the Housing Choice Voucher Programs

4. TEAM ENGAGEMENT FINAL REPORT

See attached staff report.

ADJOURNMENT

The next Regular Meeting will be held on February 15, 2024, at 12:00 p.m.

REQUIREMENTS OF THE BROWN ACT HAVE BEEN SATISFIED AS THIS NOTICE WAS POSTED AT 2:30 P.M. ON JANUARY 12, 2024, 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.

RESOLUTION NO. 7 (2024 SERIES)

**RESOLUTION ELECTING CHAIR AND VICE CHAIR
OF THE HOUSING AUTHORITY OF THE CITY OF SAN LUIS OBISPO**

WHEREAS, the Bylaws of the Housing Authority of the City of San Luis Obispo (hereinafter “HASLO”) state that the Chairman (otherwise known as “Chair) and Vice Chairman (otherwise known as “Vice Chair”) shall be elected at the annual meeting of the HASLO Board of Commissioners (hereinafter “Commissioners”) from among the Commissioners, and shall hold office for one year or until their successors are elected and qualified; and

WHEREAS, the Commissioners opened, accepted, and voted on nominations for the positions of Chairman and Vice Chairman;

NOW THEREFORE BE IT RESOLVED THAT, according to the Bylaws of the Housing Authority of San Luis Obispo, let this Resolution assert that _____ is Chair and _____ is Vice Chair until the January 2024 annual meeting according to the Bylaws of the Housing Authority of San Luis Obispo.

On a motion by Commissioner _____, seconded by Commissioner _____, and on the following roll call vote:

AYES:

NOES:

ABSENT:

ABSTAINED:

The foregoing Resolution was duly adopted and passed this 18th day of January, 2024.

_____, CHAIRMAN

SEAL:

ATTEST:

SCOTT COLLINS, SECRETARY

RESOLUTION NO. 8 (2024 SERIES)

RESOLUTION 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

WHEREAS, the Housing Authority of the City of San Luis Obispo (HASLO) requires authorized signers on behalf of the Housing Authority and all partnerships and limited liability companies where it is manager or managing partners.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Housing Authority of the City of San Luis Obispo that the Commission Chair and Vice Chair, as designated in Resolution No. 7 of the 2024 Series (attached), are authorized to sign contracts, deeds, funding documents, grants, and other instruments on behalf of the Housing Authority of the City of San Luis Obispo and on behalf of all partnerships and limited liability companies where the Housing Authority is the manager or managing general partner;

BE IT FURTHER RESOLVED that Scott Collins, in his capacity as the Executive Director/Secretary of the Housing Authority; Ken Litzinger, in his capacity as the Finance Director; and Clover Robinson, in her capacity as Interim Deputy Finance Director, are also authorized to sign contracts, deeds, funding documents, grants, and other instruments on behalf of the Housing Authority of the City of San Luis Obispo and on behalf of all partnerships and limited liability companies where the Housing Authority is the manager or managing general partner.

On motion of Commissioner _____, seconded by Commissioner _____, and on the following roll call votes:

AYES:

NOES:

ABSENT:

ABSTAINED:

The foregoing Resolution was duly adopted and passed this 18th day of January, 2024.

_____, **CHAIRMAN**

SEAL:

ATTEST:

SCOTT COLLINS, SECRETARY

**** DRAFT ****

MINUTES

HOUSING AUTHORITY OF THE CITY OF SAN LUIS OBISPO

November 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, November 16, 2023, at 12:01 p.m. at 1150 Laurel Lane, Suite 180, San Luis Obispo, by Chair Ashlea Boyer.

ROLL CALL

PRESENT: Commissioners Boyer, Jeffries, Odenthal, Shower, Souza, Steinberg

Commissioner Crotser was present virtually. As a public entity, Commissioners must physically be present to vote except in emergency situations. Thus, Commissioner Crotser is listed as “absent” for vote counts.

ABSENT: None

STAFF: Scott Collins, Ken Litzinger (virtual), Sandra Bourbon, Michael Burke, Michelle Pedigo, and Vicky Culman

PUBLIC COMMENT:

None.

EXECUTIVE DIRECTOR’S REPORT:

Scott Collins, Executive Director, reported that, as previously reported to the Board, HASLO has been talking to County staff about reinstating the CDBG funds for Maxine Lewis.

12:02 P.M. Member of public now present appearing as iPhone virtually.

The City of San Luis Obispo feels the use of their CDBG funds for Maxine Lewis is fine. The County was told by HUD that the CDBG funds could not be used for acquisition. Collins stated that the Board may be called upon to assist in lobbying for use of the CDBG funds in this manner. In response to a question from the Commissioners, Ken Litzinger, Director of Finance, stated that we have used CDBG funds for acquisitions for 23 years. This is the first time that an issue has been raised about using CDBG funds in this manner. If CDBG funds can no longer be used for acquisitions, projects nationwide will be affected. Collins said our attorneys and Congressman Carbajal’s office are working on this. The Oak Park construction bid is \$1 million over budget due to federal wage regulations. Finding additional funding for that project is a priority.

Toscano and Morro Bay have received their electrical switch gears and we are targeting January and February for lease up.

There will be a compensation study update next month. The additional 3% that was previously approved by the Board is in line with the recommendation.

The 6.5-hour Board meeting with staff and Koble Collaborative produced our internal statement. We are now working towards implementation. Two additional meetings with managers and Koble helped create initiatives and outline priorities. Additional information will be provided at our next meeting.

Before moving to the Consent Agenda, Collins asked the member of the public if they had any specific questions or concerns. She replied that she was hoping to hear something about Section 8.

CONSENT AGENDA:

- C1. MINUTES OF THE BOARD OF COMMISSIONERS REGULAR MEETING OF OCTOBER 19, 2023, AND THE SPECIAL MEETING OF OCTOBER 26, 2023**
- C2. HASLO MONTHLY DISBURSEMENT REGISTER (available for review at the meeting)**
- C3. HOUSING CHOICE VOUCHER (SECTION 8)**
- C4. FAMILY SELF-SUFFICIENCY & RESIDENT SERVICES PROGRAM REPORT**
- C5. CONSTRUCTION AND DEVELOPMENT REPORT**

The Commissioners asked if the potential shortfall in the Housing Choice Voucher/Section 8 program was due to higher rents and if that is normal. Michelle Pedigo, Interim Director of Housing Management, explained that the Mainstream program funding amount was much lower than the average HAP cost of these vouchers. Additional funding was received last time to avoid a shortfall and we are hoping for the same this time.

Collins addressed the public participant at the meeting. He explained that there are no vouchers available at this time. We are waiting for the actual federal budget to get passed. Ken Litzinger, Director of Finance, explained that there is a continuing resolution through December 31, 2023. If no budget is passed by that date, the contingency plan is to continue funding as of January 1, 2024, but at the 2022 levels. Collins explained that we cannot project an increase in Section 8 funding.

12:15 P.M. Commissioner Jeffries now present.

If funding is available to issue new vouchers, we will advertise on our website, www.HASLO.org. Project-Based Vouchers (PBVs) are intermittently available and are also advertised on our website. HASLO does not maintain a Section 8 interest list. Litzinger explained that people currently on our Section 8 wait list will be served first when funding is available. If there is money available after admitting those people into the program, then we may be able to open the interest list again. Pedigo explained that there is some attrition every month, but that allows only a few currently on the wait list to get processed.

Collins closed by reporting that Shell Beach is set to meet its deadline.

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

DISCUSSION ITEMS:

- 1. APPROVING AMENDMENTS TO INCOME ELIGIBILITY LIMITS FOR VASH PROGRAM**
Collins thanked Pedigo for her initiative in this matter. HUD now allows PHAs to admit low-income (80% of AMI) as well as very low-income (50% of AMI) veterans into the HUD-VASH program. The Commissioners and staff discussed the program.

ACTION TAKEN: A motion to adopt **Resolution No. 26 (2023 Series) Approving Amendments to the Housing Authority of San Luis Obispo’s Income Eligibility Limits for Veterans Affairs Supportive Housing (VASH) Program** was made by Commissioner Jeffries, seconded by Commissioner Souza, and approved on the following roll call vote:

AYES: Commissioners Jeffries, Souza, Boyer, Odenthal, Shower, Steinberg
NOES: None
ABSENT: Commissioner Crotser
ABSTAINED: None

2. APPROVING SECTION 8 MANAGEMENT ASSESSMENT PROGRAM (SEMAP) CERTIFICATION

SEMAP is our annual internal audit of the Housing Choice Voucher/Section 8 program. We continue to score as a high performing PHA. This year, however, we did not get full points for Item #6, HQS Enforcement, due to delays from COVID delays and change in staff. The new inspector has done a phenomenal job to get us caught up, and we anticipate getting full points for this item next year.

ACTION TAKEN: A motion to adopt **Resolution 27 (2023 Series) Approving Section 8 Management Assessment Program (SEMAP) Certification** was made by Commissioner Souza, seconded by Commissioner Boyer, and approved on the following roll call vote:

AYES: Commissioners Souza, Boyer, Jeffries, Odenthal, Shower, Steinberg
NOES: None
ABSENT: Commissioner Crotser
ABSTAINED: None

3. GRANTING PG&E EASEMENT TO BRIDGE STREET FAMILY APARTMENTS, ORCUTT ROAD APARTMENTS (AKA MAXINE LEWIS APARTMENTS) AND ROCKVIEW AT SUNSET (AKA MORRO BAY APARTMENTS)

HASLO has consistently granted easements to PG&E to get power to our projects. PG&E now recognizes that HASLO is a public entity and is requiring resolutions.

ACTIONS TAKEN:

A motion to adopt **Resolution 28 (2023 Series) Granting PG&E an Easement to the Real Property for Bridge Street Family Apartments** was made by Commissioner Steinberg, seconded by Commissioner Shower, and approved on the following roll call vote:

AYES: Commissioners Steinberg, Shower, Boyer, Jeffries, Odenthal, Souza
NOES: None
ABSENT: Commissioner Crotser
ABSTAINED: None

A motion to adopt **Resolution 29 (2023 Series) Granting PG&E an Easement to the Real Property for Orcutt Road Apartments (aka Maxine Lewis Apartments)** was made by Commissioner Steinberg, seconded by Commissioner Shower, and approved on the following roll call vote:

AYES: Commissioners Steinberg, Shower, Boyer, Jeffries, Odenthal, Souza
NOES: None
ABSENT: Commissioner Crotser
ABSTAINED: None

A motion to adopt Resolution 30 (2023 Series) Granting PG&E an Easement to the Real Property for Rockview at Sunset (aka Morro Bay Apartments) was made by Commissioner Steinberg, seconded by Commissioner Shower, and approved on the following roll call vote:

AYES: Commissioners Steinberg, Shower, Boyer, Jeffries, Odenthal, Souza
NOES: None
ABSENT: Commissioner Crotser
ABSTAINED: None

12:30 P.M. Member of public on iPhone now absent.

4. CLEAVER & CLARK COMMONS

Litzinger explained that we are partnering with PSHH (People’s Self-Help Housing) and the City of Grover Beach for this project. The project has been awarded tax credits and state funding. The project must close to begin construction by January 22, 2024. This project will consist of 53 units totaling \$43 million.

ACTIONS TAKEN:

A motion to adopt Resolution No. 31 (2023 Series) Authorizing Resolutions RE: Leasing of Land and Securing the Financing of Cleaver & Clark Commons was made by Commissioner Jeffries, seconded by Commissioner Souza, and approved on the following roll call vote:

AYES: Commissioners Jeffries, Souza, Boyer, Odenthal, Shower, Steinberg
NOES: None
ABSENT: Commissioner Crotser
ABSTAINED: None

A motion to adopt Resolution No. 32 (2023 Series) Authorizing Resolutions RE: Leasing of Land and Securing the Financing of Cleaver & Clark Commons was made by Commissioner Jeffries, seconded by Commissioner Souza, and approved on the following roll call vote:

AYES: Commissioners Jeffries, Souza, Boyer, Odenthal, Shower, Steinberg
NOES: None
ABSENT: Commissioner Crotser
ABSTAINED: None

5. 5 CITIES HOMELESS COALITION (5CHC) WARMING CENTER – INCREASE IN FACILITY PREP COSTS

When the Commission last met, up to \$10,000 was approved to make one of our buildings at 700 N. Oak Park habitable for 5CHC to use as a temporary warming center until construction of their permanent warming center is completed. Unfortunately, the site requires significant remediation due to biohazards. We received two bids for the clean-up, one at \$25k and the other at \$13k. The work would take about two days. 5CHC’s Executive Director, Jana Nichols, is looking at other options. Commissioners and staff discussed accessibility and ADA requirements.

Litzinger stated that we are currently waiting to hear if 700 N. Oak Park will be awarded Multifamily Housing Program (MHP) funding. If awarded, we can apply for tax credits early next year.

ACTION TAKEN: A motion to adopt **Resolution No. 33 (2023 Series) Authorizing an Increase in the Cost to Modify a Dwelling at 700 N. Oak Park Boulevard in Arroyo Grande to be Used as a Temporary Warming Center by Five Cities Homeless Coalition** was made by Commissioner **Boyer**, seconded by Commissioner **Shower**, and approved on the following roll call vote:

AYES: Commissioners **Boyer, Shower, Jeffries, Odenthal, Souza, Steinberg**
NOES: **None**
ABSENT: Commissioner **Crotser**
ABSTAINED: **None**

There being no further business, the meeting was adjourned at 12:48 p.m.

Respectfully submitted,

Scott Collins, Secretary

* * * DRAFT * * *

MINUTES

SPECIAL MEETING

HOUSING AUTHORITY OF THE CITY OF SAN LUIS OBISPO

December 7, 2023

CALL TO ORDER

A Special Meeting of the Housing Authority of the City of San Luis Obispo was called to order on Thursday, December 7, at 10:01 a.m. by Chair Ashlea Boyer.

ROLL CALL

PRESENT: Commissioners Boyer, Crotser, Jeffries, Odenthal, Steinberg

ABSENT: Commissioners Shower, Souza

STAFF: Scott Collins, Ken Litzinger, Vicky Culman

PUBLIC COMMENT:

None.

DISCUSSION ITEM:

1. BRIDGE STREET

Ken Litzinger, Director of Finance, explained that the resolution was drafted by our legal counsel for closing Bridge Street. The amounts listed in the resolution are higher than anticipated needs but staff wanted to avoid having to come back to the Commissioners for small increases. Litzinger said the development fee is being differed because the construction bids and interest rates were higher than anticipated.

The Commissioners requested several corrections to the resolution. Some paragraphs refer to the “Board of Commissions” rather than “Board of Commissioners.” In another paragraph, the Commissioners wanted the sentence, “That the Authority shall provide . . . and to shall into any and all documents, . . .” clarified to “That the Authority shall provide . . . and shall enter into any and all documents, . . .” The paragraph about entering into agreements, “. . . not limited to Agreements to Enter into a Housing Assistance Payment Contract, Housing Assistance Payment Contract;” was difficult to understand. Litzinger suggested adding an “and” between “. . . Agreements to Enter into a Housing Assistance Payment Contract, **and** Housing Assistance Payment Contracts; . . .”

ACTION TAKEN: A motion to adopt **Resolution No. 34 (2023 Series) Authorizing Resolutions RE: Leasing of Land and Securing the Financing of Bridge Street Phase I** with the corrections as noted was made by Commissioner **Crotser**, seconded by Commissioner **Steinberg**, and approved on the following roll call vote:

AYES: Commissioners Crotser, Steinberg, Boyer, Jeffries, Odenthal

NOES: None

ABSENT: Commissioners Shower, Souza

ABSTAINED: None

2. ORCUTT ROAD

Litzinger explained that HASLO owns the land and will lease it to the partnership just as with Bridge Street. This project has funding from more sources including the County and the City of SLO. We are waiting to hear from the County regarding some of their funds. We have to close by January 18, and we are on the agenda for the January 9th County Board of Supervisors meeting. If the County cancels its funding, HASLO may have to put forward more money. In response to a question about the lease, Litzinger explained that the lease is for 75 years.

The Commissioners requested the same corrections to Resolution No. 35 that were corrected on Resolution No. 34.

ACTION TAKEN: A motion to adopt **Resolution No. 35 (2023 Series) Authorizing Resolutions RE: Leasing of Land and Securing the Financing of Maxine Lewis Project** with the corrections as noted was made by Commissioner **Jeffries**, seconded by Commissioner **Boyer**, and approved on the following roll call vote:

AYES: Commissioners **Jeffries, Boyer, Crotser, Steinberg, Odenthal**
NOES: **None**
ABSENT: Commissioners **Shower, Souza**
ABSTAINED: **None**

3. GRANTING PG&E EASEMENT TO THE TOSCANO APARTMENTS

ACTION TAKEN: A motion to adopt **Resolution 36 (2023 Series) Granting PG&E an Easement to the Real Property for The Toscano Apartments** was made by Commissioner **Steinberg**, seconded by Commissioner **Crotser**, and approved on the following roll call vote:

AYES: Commissioners **Steinberg, Crotser, Boyer, Jeffries, Steinberg, Odenthal**
NOES: **None**
ABSENT: Commissioners **Shower, Souza**
ABSTAINED: **None**

4. CLEAVER & CLARK COMMONS

Litzinger explained that the Housing Trust Fund (HTF) made a commitment of funds to the project, but those funds may have to pass through HASLO first before going to Cleaver & Clark Commons.

The Commissioners requested clarification to the paragraph that says:

WHEREAS, the Housing Trust Fund may need to fund this loan to the Housing Authority of the City of San Luis Obispo for the Housing Authority of the City of San Luis Obispo to then loan these funds to Cleaver & Clark Commons, L.P. (HASLO HTF Loan).

The paragraph should be changed to:

WHEREAS, the Housing Trust Fund may need to fund this loan to the Housing Authority of the City of San Luis Obispo in order for the Housing Authority of the City of San Luis Obispo to then loan these funds to Cleaver & Clark Commons, L.P (HASLO HTF Loan).

ACTION TAKEN: A motion to adopt **Resolution 37 (2023 Series) to Approve Additional Public Funds Loan by HASLO to Cleaver & Clark Commons** was made by Commissioner **Steinberg**, seconded by Commissioner **Crotser**, and approved on the following roll call vote:

AYES: Commissioners **Steinberg, Crotser, Boyer, Jeffries, Steinberg, Odenthal**
NOES: **None**
ABSENT: Commissioners **Shower, Souza**
ABSTAINED: **None**

5. **HASLO SPONSORSHIP OF POLLING FOR POTENTIAL AFFORDABLE HOUSING REVENUE MEASURE**

Scott Collins, Executive Director, explained that he is coordinating with other affordable housing developers and teams about building more affordable housing. Discussion has focused on including a referendum on the next ballot to commit funds to affordable housing. The first step is to determine if the community will support such a measure. The group working on this is considering a poll of the community about the need for affordable housing. PSHH and possibly the Paso Robles Housing Authority are on board. Collins is seeking support from the Commissioners to sponsor a poll in an amount up to \$40,000.

ACTION TAKEN: A motion to adopt authorize staff to fund up to \$40,000 for a poll on affordable housing was made by Commissioner **Crotser**, seconded by Commissioner **Jeffries**, and approved by all Commissioners present. The Commissioners requested updates on this in the future.

There being no further business, the meeting was adjourned at 10:39 a.m.

Respectfully submitted,

Scott Collins, Secretary

Executive Summary

Housing Choice Vouchers (“Section 8”)

- SEMAP Report
 - The closing for PIC has been late for the last few months. The most recent report, November, is attached.

- HOTMA Update
 - We recently attended a HOTMA update hosted by our software vendor, Yardi. Yardi is making good progress in incorporating the necessary HOTMA changes. However, before any agency can move to HOTMA we need HUD to finish their new portal called HIP. This portal will replace PIC. According to Yardi, HUD still has considerable progress to make before the portal is ready. We will continue to watch for updates from HUD about any potential changes to implementation dates.
 - Nan McKay has completed updating their model admin plan for the HOTMA changes. We are reviewing the plan and making the necessary updates for HASLO-specific policies. Once that is completed we will bring the revised plan to the board. The timing of that will have to be coordinated with the implementation of HUD's new portal.
 - Staff are attending, and will continue to attend, training to understand all the new requirements.

- NSPIRE Update
 - NSPIRE is HUD's new inspection procedure. Similar to HOTMA, there have been significant delays in being able to implement these procedures. Yardi did mention in their latest update that they thought NSPIRE was much closer to being ready than HOTMA is. A PIH notice dated September 29, 2023, gave all PHA's until October 1, 2024 to implement the new procedures. We will implement sooner if we receive notification from our software vendor that they have the software updated for these procedures.

- Voucher Funding Update
 - Since our HAP reserves were reinstated we have been able to start leasing up some set-aside vouchers.
 - Given the uncertainty of the upcoming federal budget, we are holding off on any major lease-up of vouchers off the waiting list.
 - Attached is a graphical analysis of average family income, average rent to owner, and average HAP shows the predicted results through Jan 2024.
 - There are no significant changes in this report compared to last month's report.

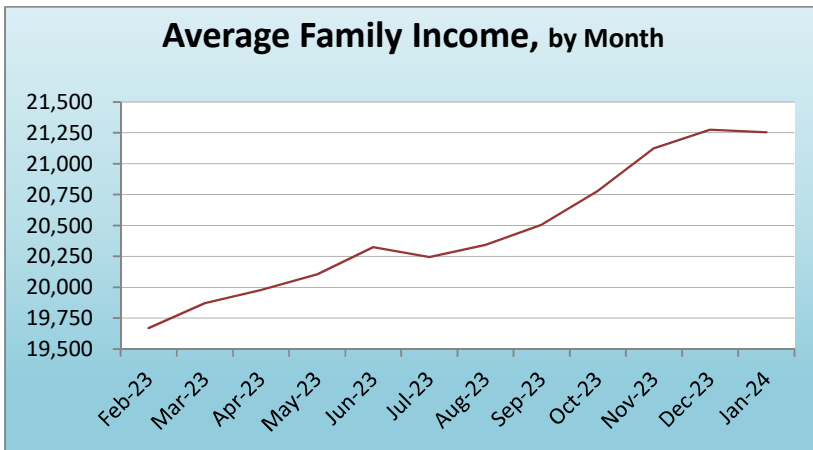
- Emergency Housing and Mainstream Vouchers
 - The deadline for issuing new EHV vouchers was September 30, 2023. Vouchers in this program will continue to decline as people leave the program.
 - HUD has directed us to stop issuing Mainstream vouchers as our current HAP needs are higher than our funding. We anticipated this since the funding amount was much lower than the average HAP cost of these vouchers. We've submitted to HUD evidence of the true cost of these vouchers and hope to get additional funding and continue leasing. HUD did issue additional funding to make up for some of the shortfall, but has not yet given us authorization to continue leasing.

HASLO

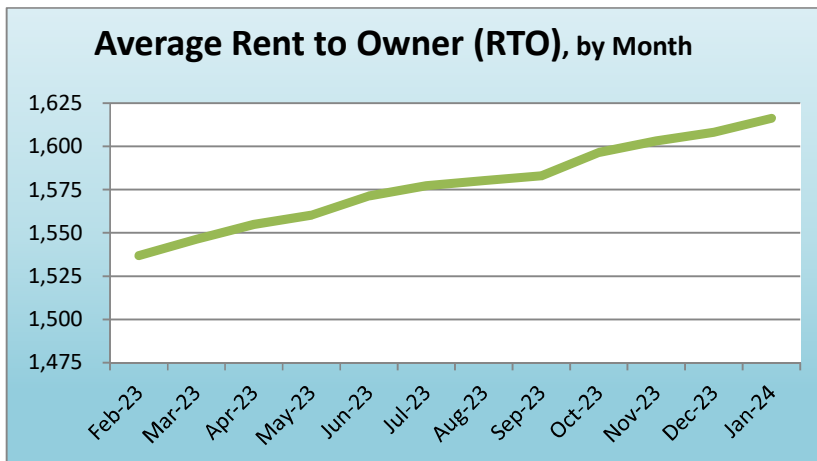
Voucher Monthly Analysis (VMA)

Rolling 12 months, with projections through Jan 2024

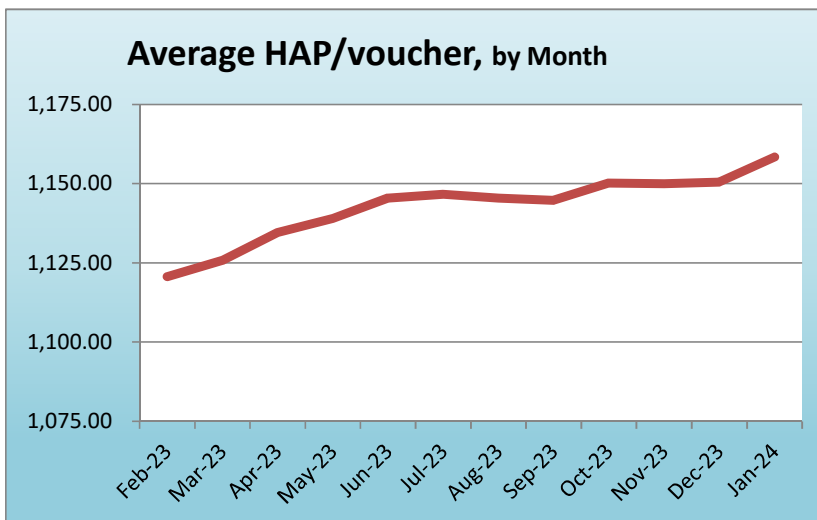
Note: includes Welcome Home Vouchers (EHV)



Average HH Income, 12 month % change: 8.1%



RTO, 12 month % change:
(including new leases) 5.2%



Average HAP, 12 month % change: 3.4%

Notes:

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

SEMAP Indicators Report

As of November 30/, 2023

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

 Download in Excel
  Print Page
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Current SEMAP Indicator Information

Most Recent SEMAP Indicator Information

Reporting Rate as of November 30/, 2023

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	2495	10/23	16	34	2513	2730	100

Indicator 9: Annual Reexaminations

Note: For Indicators 9-12 and 14, HUD mandates for SEMAP a Reporting Rate of atleast 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	Number of Late Reexaminations
2919	1

[\[-\] Families with reexaminations overdue:](#)

Last name, First name, Middle Initial	Date of last annual reexamination	Number of Months since Last Annual Examination
██████████	09/01/2022	14

Indicator 10: Correct Tenant Rent Calculations

Percent of Families with incorrect rent calculation (%)
 (SEMAP scores zero points when more than 2 percent of the Housing Authority's tenant rent calculations are incorrect as indicated by percentages shown in red and bold.) 0

Number of Families in Current Database	Number of Rent Discrepancies
1852	0

[\[-\] Families with incorrect rent calculation\(s\):](#)

No records found

**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	Number of Inspections On or Before Effective Date
441	441

[\[-\] Families where HQS inspection did not pass before lease and HAP contract:](#)

No records found

**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.) **0**

Number of Families in Current Database	Number of Late Inspections
2368	4

[\[-\] Families with annual HQS inspections overdue:](#)

Last name, First name, Middle Initial	Date of last HQS Inspection	Number of Months since Last HQS Inspection
██████████	08/24/2021	27
██████████	08/27/2021	27
██████████	09/22/2021	26
██████████	09/28/2021	26

**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	63	0	51	86

[**\[+\] 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.

Housing Authority of San Luis Obispo
Housing Choice Voucher Lease up and Funding Analysis
January 2024

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 2,290 general vouchers, 226 Veterans vouchers, and 47 Family Unification/Foster Youth Initiative vouchers for a total of 2,563 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.

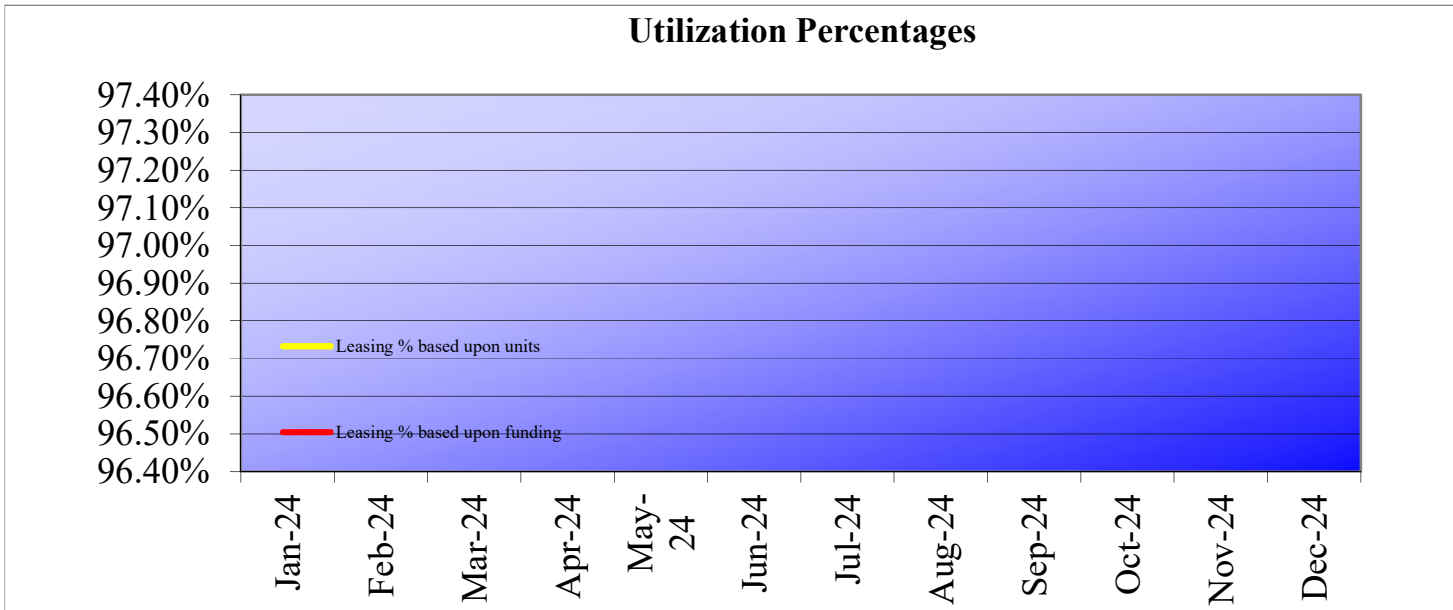
For 2023, we averaged a 97%+ lease up of units, and averaged 105% utilization of the funding we received. These numbers placed HASLO in the High Performer category. Funding levels as of January 1st are very uncertain. We are using an estimated 3% inflation factor increase of funding for 2024 based on information we have received from HUD. The goal this year is to have strong leasing numbers while preparing for a potential decrease in funding for 2024. We ended the year with approximately \$1.6 million in reserves.

HUD recently announced funding for additional VASH Vouchers. Our Registration of Interest was accepted and we were invited to officially apply for 20 additional Vouchers.

Our EHV program has been fully leased-up. This program expired in September 2023 and will only provide funding for existing vouchers and will not allow any additional participants.

Housing Authority San Luis Obispo
HCV Leasing Financial Analysis
January 2024

	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 2024	2,563	2,479	96.72%	\$ 2,867,370	\$ 2,789,399	\$ 77,971	97.28%	\$ 1,125
February 2024								
March 2024								
April 2024								
May 2024								
June 2024								
July 2024								
August 2024								
September 2024								
October 2024								
November 2024								
December 2024								
YTD	2,563	2,479	96.72%	\$ 2,867,370	\$ 2,789,399	\$ 77,971	97.28%	\$ 1,125



NRA + Prog Reserve Balance (Excess HAP) as of 1/1/2024	\$ 1,611,076	YTD Voucher	YTD	
HAP Funding YTD:	\$ 2,867,370	Months Available	Vouchers Leased	
HAP Expenditures YTD:	\$ 2,789,399			
HAP Revenue (Fraud, FSS Forfeits) YTD:	\$ -	Regular Vouchers	2,290	2,237 97.7%
Current Remaining NRA / Prog Reserve:	\$ 1,689,047	Veterans (VASH)	226	203 89.8%
Months in Reserves at Current Monthly Expense Levels		Family Unification	47	39 83.0%
Reserves as a Percentage of Budget Authority	4.9%	Total Vouchers	2,563	2,479 96.7%
Current Monthly Funding (a)	\$ 2,867,370	Mainstream	183	176 96.2%
Current Average HAP Payment (b)	\$ 1,125	Emergency Housing	196	192 98.0%
# of Units the Current Monthly Funding Would Support (a)/(b)	2,548			
# of Units Currently Leased	0			
Excess Units Leased, Current Month	(2,548)			
Current Year-to-Date Funding (a)	\$ 2,867,370			
Current Year-to-Date Average HAP Payment (b)	\$ 1,125			
# of Unit-Mos the Current Monthly Funding Supports (a)/(b)	2,548			
# of Unit-Mos Leased Year-to-Date	2,479			
Excess Unit-Mos Leased, Year-to-Date	(69)			

**Vacancy Summary
as of 12/31/23**

	<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>					
NOTE: All day counts include weekends										
<u>Tax Credit Properties</u> <i>(rolling 12 months)</i>										
860 on the Wye	\$0	\$0	\$255,030	0.95%	0.00%	-	0%	0	20	100%
Atascadero	\$0	\$2,766	\$261,036	1.76%	1.06%	49	11%	2	19	100%
Bishop Street Studios	-	\$13,104	\$486,024	1.01%	2.70%	83	12%	4	33	97%
Brizzolara	\$0	\$3,174	\$389,556	2.00%	0.81%	9	7%	2	30	100%
Carmel	-	\$0	\$263,988	1.18%	0.00%	39	5%	1	19	100%
Courtyard	\$1,564	\$16,879	\$600,168	1.15%	2.81%	58	29%	10	35	97%
DRT (Johnson)	\$0	\$2,540	\$617,544	0.79%	0.41%	51	8%	3	40	100%
Halcyon	\$1,504	\$863	\$261,936	1.00%	0.33%	47	20%	4	20	100%
Hidden Creek	\$1,120	\$4,388	\$1,181,316	0.26%	0.37%	33	10%	8	80	99%
Ironworks	\$0	\$19,909	\$779,004	2.46%	2.56%	75	15%	7	46	100%
RAD175/SLO Villages	\$196	\$39,394	\$2,853,156	1.00%	1.38%	50	14%	25	175	99%
Islay Hills (Ironbark)	\$0	\$1,939	\$303,216	1.27%	0.64%	56	10%	2	20	100%
Laurel (Marvin Gardens)	\$1,059	\$0	\$350,928	1.27%	0.00%	39	4%	1	24	96%
Pismo Buchon	\$0	\$3,993	\$183,684	1.27%	2.17%	87	18%	2	11	100%
Willow Walk	\$157	\$4,504	\$744,048	2.00%	0.61%	30	10%	4	39	100%
Total, Tax Credit Properties	\$5,600	\$113,453	Average=	1.29%	1.06%	50	12%	5		99%
<u>SLONP Properties</u> <i>(rolling 12 months)</i>										
Blue Heron	\$0	\$0	\$236,808	0.58%	0.00%	22	7%	1	14	100%
Empire	1,100.00	\$1,114	\$173,400	1.00%	0.64%	44	15%	2	13	92%
Ferrell	2,030.00	\$4,307	\$180,144	1.64%	2.39%	47	38%	3	8	88%
Macadero	\$1,575	\$14,951	\$336,984	9.06%	4.44%	86	32%	6	19	95%
Margarita	\$0	\$1,133	\$414,348	1.12%	0.27%	17	5%	1	21	100%
Total, SLONP Properties	\$4,705	\$21,505	Average=	2.68%	1.55%	43	19%	3		95%
<u>EIHC Properties</u> <i>(rolling 12 months)</i>										
Poinsettia	-	\$0	\$487,380	4.00%	0.00%	36	5%	1	20	100%
Total, EIHC Properties	\$0	\$0								
<u>50059/Other Properties</u> <i>(rolling 12 months)</i>										
Dan Law	\$1,225	\$6,283	\$131,400	2.54%	4.78%	90	33%	3	9	89%
Parkwood	\$0	\$16,156	\$639,948	4.00%	2.52%	59	15%	5	34	100%
Total, 50059/Other Properties	\$1,225	\$22,439	Average=	3.65%	3.65%	75	24%	4		94%
	\$11,530	\$157,397	Overall Average=	1.34%	1.34%	50	14%	4		98%
<i>prior month</i>	\$13,113		<i>Prior Month Overall=</i>	<i>1.72%</i>	<i>1.72%</i>	<i>52</i>	<i>12%</i>	<i>4</i>		<i>98%</i>
<i>% increase/(decrease)</i>	-12%		<i>net change</i>	<i>-0.38%</i>	<i>-0.38%</i>	<i>-2</i>	<i>2%</i>	<i>0</i>		<i>0%</i>

January 10, 2024

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

Family Self Sufficiency Program (FSS):

Continued outreach, case management and annual assessments. The below chart is as of 12-31-2023 (2022 FSS grant).

Active	64
New contracts added this month	0
Graduates this grant period	10
Terminated for Non-Compliance/Contract Expired/Voluntary Termination this grant period	11
Active participants who have ported out this grant period	0
Increase in Earned Income this month	1,020,810
Increase in Total Tenant Payment (TTP) this month	18,444
Total Escrow Accounts	53
New Escrow Accounts this grant period	16
Percentage of participants with an Escrow Account this month	82.81%
Total Escrow Account balance	347,900
Total of Escrow Account funds paid out to FSS Graduates for this grant period	103,693
Forfeited Escrow Balance 2022	2,496
Forfeited Escrow Balance 2023	23,316.14
Forfeited Escrow Funds paid to participants (2023)	8,521.83
Total Forfeited Escrow Account Balance	17,290.31

Savings Incentive Program (SIP) results:

We had 30 participants sign up for the program and 19 participants completed the program and received matching funds up to \$500. A total of \$8,521.83 was disbursed to active participants. Some participants save more and the total of funds saved was \$9,080.83. We look forward to your feedback and ideas for 2024.

2023 FSS NOFO:

We were awarded the 2nd year of the first 2-year application with a 5% increase (\$253,707).

SERVICES:

We are happy to announce that Diego Lopez-Guardado (currently our Front Office Receptionist) will be starting as a Resident Services Assistant as of February 1st, 2024. He will be assisting with onsite services and activities.

Family Self Sufficiency Newsletter

Family Self-Sufficiency (FSS) Program

Coordinating Committee (PCC) Members:

Sandra Bourbon

Director of Resident Services

Traci Walker

Resident Services Coordinator

Katie Arras

Resident Services Assistant

Mia Ramos

Resident Services Assistant

Patricia Souza

HASLO Commissioner Representative

Shauna Paulson

CAPSLO - CCRC

Yvonne Morales

Tribal TANF

Denise Martinez

Resident Member - FSS Graduate

Corrina Stolp

Cuesta College - café

Susan Lamont

Lumina Alliance

Margaux Jones / Marie Bolin

Family Care Network Inc.

Braden Pivrotto

Department of Rehabilitation

Jennifer Campos / Joey Valero

Eckerd Connects

Welcome New FSS Participants

Susanna C., Cherish C., Arianna C.,
Nancy R., Andrew W., Ashlynn R.,
Carly A.

Congratulations FSS Graduates:

V. P. - Pharmacy Technician \$14,245

Job Openings at HASLO

- Front Office Receptionist
- Housing Assistant II
- Property Supervisor
- Maintenance Technician

Candidates must submit a HASLO Employment Application to be considered for an interview. Jobs will remain open until filled, unless a filing deadline is indicated. To view open positions and the application packet, please visit

<https://www.haslo.org/career-opportunities>

Opening Soon: 1, 2, and 3-Bedroom Project-Based Voucher (PBV) Wait List for Oak Park 3 and 4 in Paso Robles

Apply Online December 26-28th, 2023

Tuesday, December 26th at 9:00am through Thursday, December 28th, at 4:00pm. Eligible applications will be placed on the wait list in date/time order, with preferences for SLO County residents and veterans, and are generally restricted to households who earn less than 30% of Area Median Income (AMI). For more information or to apply, please visit <https://www.haslo.org/>.

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Visit us at <https://www.haslo.org/>

Vocational Rehabilitation Services

DOR DEPARTMENT of REHABILITATION CA Department of Rehabilitation (DOR)
Employment, Independence & Equality

believes in the talent and potential of all job seekers with disabilities. **How can DOR help?** Vocational Rehabilitation Services are available to job seeker with disabilities of all ages. Get help figuring out your job goal, job searching, preparing for work and much more! Additional services are available. For more information about available programs, please visit www.dor.ca.gov/HomeSanLuisObispo

Finding a Mental Health Provider

CenCal Health: Medi-Cal members can contact CenCal health directly to find a mental health provider who accepts Medi-Cal: 877-814-1861. CenCal Health staff will conduct a screening and then provide three options of providers who they believe to have openings. If a member has tried to find a provider but cannot, CenCal Health's Navigation staff can outreach to providers for the member and work with them to find a provider. Members can request this service through the main call-center number 877-814-1861.

Community Counseling Center: Short-term counseling for adults and children ages 5 and up with mild to moderate mental health issues and no insurance, Medi-Cal, or under-insured (low income and cant afford their insurance costs). Sliding scale based on income; free for Medi-Call members. Call 805-543-7969 for a brief eligibility screening.

Lumina Alliance: For children ages 5 and up with exposure to family violence and sexual assault. The wait is not long right now for English-speaking therapists; no Spanish-speaking capacity right now. Call the info/hotline at 805-545-8888 for an assessment and services.



Use CalFresh to purchase groceries online. CalFresh (also known as SNAP) recipients can now use their EBT card to purchase groceries online for delivery from Amazon. You can order food online that you would normally buy with your EBT card in-person. To learn how to begin ordering food online, please visit <https://www.amazon.com/snap-ebt/b?ie=UTF8&node=19097785011>

FREE Tax Preparation Programs

United Way of SLO is preparing for their 2024 tax programs! Volunteer Income Tax Assistance (VITA) appointments will be available to schedule in the new year.

For updates and eligibility requirements, please visit,

<https://www.unitedwayslo.org/taxes>

Cal Poly Volunteer Income Tax Assistance clinic will offer walk-in or appointment based services beginning in January 2024. Income restraints apply.

Please regularly visit,

<https://www.cob.calpoly.edu/vita/> for more information and service updates.

Lets Talk Autism!



Parents Helping Parents offers a once a month autism support group. This autism support group is ideal of parents, professionals, and caregivers of school-aged children. This is a wonderful chance to connect with parents and families with experiences similar to yours.

4th Tuesday of each Month

6:00pm-7:00pm via ZOOM

Call or email to RSVP. 805-543-3277 or php@ucp-slo.org

Lets Talk: Couples and Money



Lets Talk: Couples and Money is a on-demand webinar, presented by Money Management

International. In this FREE webinar, you will explore how to approach difficult money conversations with your partner, reach mutually agreeable conclusions, and make money matters a family affair.

To watch, please visit:

<https://www.moneymanagement.org/education/webinars/couples-and-money>

Money Management International also produces FREE on-demand financial health webinars, readily accessible whenever your schedule allows. To view their library of webinars, please visit:

<https://www.moneymanagement.org/education/webinars>

The Mommy Hour



Emotional Health Support During Pregnancy and Postpartum

Looking for a supportive group to understand the emotional highs and lows of motherhood? The Mommy Hour is a weekly group designed for pregnant women and moms who are experiencing the need for additional support. This casual, welcoming group is here for you whether you are looking for resources, emotional support, struggling with perinatal mood and anxiety challenges or simply needing encouragement.

The Mommy Hour meets virtually every Wednesday, 10:30AM to 12:00PM

To join the virtual group, please contact Wendy Beres at wendy.beres@dignityhealth.org



Golden 1 Credit Union: Financial Podcasts

At Golden 1, the financial well-being of all Californians is top priority! They want to help you reach your financial goals, and make it fun too! Their Financial Wellness Learning Lab is your opportunity to grow your financial knowledge for FREE! Their library of podcast episodes are available at any time and full of valuable insight! Learn skills in minutes with these episodes, including:

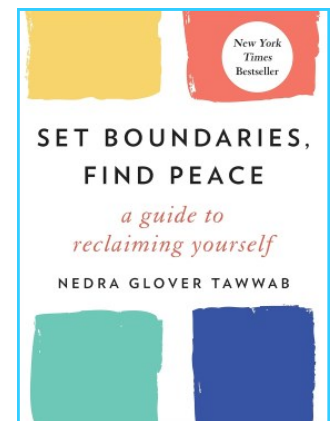
- Thrills, Chill, and Bills: Overcome Money Fears
- Money in Motion - Exploring Payment Methods
- Overcoming Money Anxiety
- Protecting Yourself from AI Scam
- New Year, New You

For their complete play list or to begin listening now, please visit:

<https://www.golden1.com/financial-wellness>

Spotlight: Self-Help Book

Set Boundaries, Find Peace: A Guide to Reclaiming Yourself dives into creating healthy boundaries in order to achieve work/life balance, coping with toxic people, and enjoying rewarding relationships; and how we can successfully express our needs, say “no”, and be assertive without offending others.



Please visit your local SLO County library to learn how you can receive a FREE library card! Or call 805-781-5991 to inquire.

Utility Assistance/HEAP

Need help with your utility bill?

CAPSLO operates the federal HEAP (Home Energy Assistance Program) for San Luis Obispo County. HEAP assists low-income households with a once a year payment toward their utility bills (gas, propane, or electric). Eligibility is based on household size and gross income. Priority is given to households with small children, seniors age 65+, and those with disabilities.

To be eligible for assistance through HEAP, applicants must:

- Be a San Luis Obispo County resident
- Be income eligible
- Provide income documentation for all adult household members during the previous 6 weeks
- Provide current gas and electric bills (2nd page must show service address)

For complete income eligibility or an application packet, please visit:

<https://capslo.org/utility-assistance/>

The CAPSLO Energy Office is closed for all walk-in clients. Applications are still being processed. Please submit applications by email, fax, mail in, or drop box.

Email: HEAP@capslo.org

Fax: 805-594-1065

Mail: CAPSLO, 3970 Short St., Ste 110, San Luis Obispo, Ca 93401

Drop Box: A box is located outside of the Short St. office door to drop off completed applications.

Questions?

Call 805-541-4122 x2114 or x2115



CDC's Together Take Me Home Program: FREE HIV Self-Test Kits

Together *Take Me Home* is a national direct-to-consumer program that offers free HIV self-tests by mail. People can order up to two free HIV self-tests every 90 days. Tests are available to anyone 17 or older, regardless of health insurance or immigration status. Please visit <https://together.takemehome.org/> to receive your free test kit.

SESLOC's FREE Financial Educational Center



Take control of your financial health by learning how with SESLOC's free financial education center! Check out their latest webinar schedule or use their financial calculators to help you make informed decisions. Explore their 300+ financial health articles or speak with a financial counselor! Their financial education resources are complimentary and available to SESLOC members and neighbors alike. Please visit <https://www.sesloc.org/why-sesloc/financial-education/> to begin!



White Chocolate Coconut Cake Recipe

Ingredients:

- 1 package white cake mix (regular size)
- 1 cup water
- 1 can (15 ounces) cream of coconut, divided
- 3 large egg whites
- 1 can (5 ounces) evaporated milk
- 2/3 cup vanilla or white chips
- 2 ounces cream cheese, softened
- 1 cup heavy whipping cream, divided
- 3-1/2 cups sweetened shredded coconut, divided
- 2 teaspoons vanilla extract, divided
- 1/4 cup sugar



Directions:

In a large bowl, combine the cake mix, water, 3/4 cup cream of coconut and egg whites; beat on low speed for 30 seconds. Beat on medium for 2 minutes.

Pour into three greased and floured 9-in. round baking pans. Bake at 350° for 22-26 minutes or until a toothpick inserted in the center comes out clean. Cool for 10 minutes before removing from pans to wire racks to cool completely.

For filling, in a small saucepan, combine the evaporated milk, chips, cream cheese, 3 tablespoons heavy cream and remaining cream of coconut; cook and stir over low heat until chips are melted.

Remove from the heat; stir in 1-1/2 cups coconut and 1 teaspoon vanilla. Transfer to a large bowl; cover and refrigerate until mixture reaches spreading consistency, stirring occasionally.

For frosting, in a large bowl, beat remaining cream until it begins to thicken. Add sugar and remaining vanilla; beat until stiff peaks form.

Place bottom cake layer on a serving plate; spread with half of the filling. Repeat layers. Top with remaining cake layer. Frost top and sides of cake; sprinkle with remaining coconut. Refrigerate leftovers.

If you are a current FSS Participant or Graduate, we invite you to join us to participate and attend our quarterly Program Committee (PCC) meetings.

Please call Sandra Bourbon at
(805)594-5315 or email sbourbon@haslo.org
for more information.

"Some people look for a beautiful place. Others make a place beautiful."
- Oprah Winfrey



Visit us on the Web!

<https://www.haslo.org/>



January 10, 2024

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

Supportive Housing Program (SHP):

SHP consists of 6 case managers with 2 of the case managers onsite at Paso Home Key (PHK). I wanted to start reporting to the HASLO Board of Commissioner's on a monthly basis and am open to collecting data of specific interests as we move forward.

We currently manage 892 units and out of those we provided case management to 162 residents for the month of December.

Some of the outside agencies we collaborated with this month are:

Department of Social Services to include APS, CalFresh and IHSS

5 Cities Homeless Coalition

CAPSLO (Head Start)

The Link

Salvation Army

Eckerd Connects

Department of Rehabilitation

Jewish Family Services

St. Vincent De Paul

TruConnect

SLO County Probation

ECHO

Operation Warm

Coordinated Entry/HMIS

Paso Robles Police Department

Non-Emergent

CAT Team

THMA

Tree of Life

SLO Food Bank

Jack's Helping Hands

People's Self-Help Housing

SLO Noor Foundation

CHC

Importa

Tri-Counties Regional Center

Senior Connect Program

Family Resource Center

Hospice

Family Care Network
Los Osos Cares
San Luis Coastal Unified School District-Family Advocate
Catholic Charities

A few success stories:

Clients obtaining jobs
Gift distributions for the holidays
Substance abuse recovery and reunification with children
Obtaining health insurance
Assisted clients in scheduling much needed medical appointments
Starting the immigration process
Assisting with annual recertifications for staying successfully housed
Relocation assistance
Smoking cessation

A few challenges:

Deposit assistance
Acquiring required documents
Financial resources
Technology education for seniors
Mental health challenges and encouraging clients to accept and engage

Development Update



Date of Update	1/12/2024		
DEVELOPMENT			
PROJECT	ACTION	NOTES/GOALS	
Anderson Hotel	Construction	Seismic work ongoing, new water and electrical distribution in process 5th floor and second floor roof work completed City approved window mockup, full window set on order Beginning storefront work Repour of the sidewalk expected to be completed by end of January	
Cleaver Site, Grover	Strategy Entitlements Financing	Partnership with PSHHC for 53 units of affordable housing Fully Entitled, City Council approved the project on 12/13/2021 Construction to start in Q1 of 2024	
1422 & 1480 Monterey	Acquisition Strategy Entitlements Financing	Escrow closed on 1/11/2021 Partnership with Jim Rendler, 100+ units of mixed-use housing. JB Enterprises to management the commercial tenants Project is fully entitled Submitted multiple financing application to the state. If recommended for funding we could proceed with TCAC apps as early as spring of 2024	
Toscano Site	Construction	Project broke ground on 1/10 PG&E scheduled for 1/28/24, anticipate turnover to PM in February	
Office	Construction	Onsite grading complete. Footings have commenced Hiring Abbott Reed's PM, who was running this job, so there may be a few hiccups for a bit	
2655 Shell Beach Road	Construction	Drywall and exterior finishes 60% Project is back on schedule, subject to PG&E scheduling Anticipate turnover to PM in May	
405 Atascadero Road	Construction	Punch work is ongoing Thanks to Mr. Collins and Assemblymember Addis, we are still on track for turnover to PM this month	
736 Orcutt Road	Strategy Entitlements Financing	40+ units of special needs housing, built around the old house Project is approved Construction to start on 1/22/24, Abbott Reed is the GC and Hosanna will be the PM.	
2690 Victoria	Strategy Entitlements Financing	A redesign has been authorized for the project to serve either senior, special needs, or other SRO populations Under new zoning regs, we will apply for Director Action. This aims to be a streamlined approach TCAC application planned for 2025	
Arroyo Terrace	Strategy Entitlements Financing	63 units of large family mixed use housing Fully approved Needs additional funding, tax credit application planned for 2024	
279 Bridge Street	Strategy Financing Financing	94 units of large family/senior mixed use housing Phased TCAC applications beginning in 2023 Construction to start on phase 1, on 2/5/24. Specialty will be the GC	
Empire Apartments	Strategy Entitlements	Renovate the existing 13 units and add 19 units Entitlement extension approved at Planning Commission	

		Financing	TCAC application planned for 2025
	Macadero Apartments		
		Strategy	Renovate the existing 19 units and add 6 units
		Entitlements	Entitlement extension approved at Planning Commission
		Construction	Moving forward with "face lift," Mr. Lemus is about 85% complete
	Mesa Trails Nipomo		
		Entitlements	CUP application has been deemed complete. ER and public hearing process to commence
			Community Outreach is ongoing
			Planning Commission scheduled for 2/22/24
	West Branch AG		
		Strategy	Partnership with PSHHC on surplus lot
			Potential for 80+ units of senior housing



Toscano



The Office

RESOLUTION NO. 9 (2024 SERIES)

RESOLUTION AUTHORIZING SIGNERS AND DESIGNATING TRUSTEES ON BEHALF OF THE HOUSING AUTHORITY OF THE CITY OF SAN LUIS OBISPO (HASLO) EMPLOYEES' RETIREMENT PLAN(S)

WHEREAS, the Housing Authority of the City of San Luis Obispo (HASLO) requires authorized signers and designated trustees on behalf of the Housing Authority's employees' retirement plan(s); and

WHEREAS, HASLO has Employee Retirement Funds invested with multiple Retirement and Life Insurance companies; and

WHEREAS, these Employee Retirement Funds plans require updated authorizations of persons designated as Plan Trustees and persons who are authorized to sign actions for the Housing Authority's employees' retirement plans.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Housing Authority of the City of San Luis Obispo that the Commission Chair and Vice Chair, as designated in Resolution No.7 of the 2024 Series (attached), are designated as Plan Trustees and authorized to sign actions for the Housing Authority's employees' retirement plan(s);

BE IT FURTHER RESOLVED that Scott Collins, in his capacity as Executive Director/Secretary of the Housing Authority and Ken Litzinger, in his capacity as Finance Director; are also designated as Plan Trustees and are authorized to sign actions for the Housing Authority's employees' retirement plan(s).

On motion of Commissioner _____, seconded by Commissioner _____, and on the following roll call votes:

AYES:

NOES:

ABSENT:

ABSTAINED:

The foregoing Resolution was duly adopted and passed this 18th day of January, 2024.

_____, **CHAIRMAN**

SEAL:

ATTEST:

SCOTT COLLINS, SECRETARY

EXHIBIT A

Housing Choice Voucher Utility Allowance Schedule Effective April 1st, 2024

Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S Department of Housing and**Urban Development**

Office of Public and Indian Housing

OMB Approval No. 2577-0169

exp. 04/30/2026

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA	Unit Type	Date (mm/dd/yyyy)
HASLO	ALL building types-t24 is built into schedule	04/01/2024

Utility or Service	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	7 BR	8 BR	9 BR
Elect-All-NCty	108	154	253	312	444	588	0	0	0	0
Elect-All-NCty-t24	92	131	215	265	377	500	0	0	0	0
Elect-All-SCty	90	128	211	260	370	490	0	0	0	0
Elect-All-SCty-T24	77	109	179	221	315	417	0	0	0	0
Elect-Cook-NCty	15	18	30	43	64	90	0	0	0	0
Elect-Cook-NCty-T24	13	15	26	37	54	77	0	0	0	0
Elect-Cook-SCty	12	15	25	36	53	75	0	0	0	0
Elect-Cook-SCty-T24	10	13	21	31	45	64	0	0	0	0
Elect-Heat-NCty	30	38	68	86	126	172	0	0	0	0
Elect-Heat-NCty-T24	26	32	58	73	107	146	0	0	0	0
Elect-Heat-SCty	25	32	57	72	105	143	0	0	0	0
Elect-Heat-SCty-T24	21	27	48	61	89	122	0	0	0	0
Elect-Other-NCty	14	18	35	43	60	79	0	0	0	0
Elect-Other-NCty-T24	12	15	30	37	51	67	0	0	0	0
Elect-Other-SCty	12	15	29	36	50	66	0	0	0	0
Elect-Other-SCty-T24	10	13	25	31	43	56	0	0	0	0
Elect-Water-NCty	40	54	95	115	172	229	0	0	0	0
Elect-Water-NCty-T24	34	46	81	98	146	195	0	0	0	0
Elect-Water-SCty	33	45	79	96	143	191	0	0	0	0
Elect-Water-SCty-T24	28	38	67	82	122	162	0	0	0	0
Gas-All-NCty	53	71	94	110	130	157	0	0	0	0
Gas-All-NCty-T24	45	60	80	94	111	133	0	0	0	0
Gas-All-SCty	44	59	78	92	108	131	0	0	0	0
Gas-All-SCty-T24	37	50	66	78	92	111	0	0	0	0
Gas-Cook-NCty	6	10	12	16	19	22	0	0	0	0
Gas-Cook-NCty-T24	5	9	10	14	16	19	0	0	0	0
Gas-Cook-SCty	5	8	10	14	16	19	0	0	0	0
Gas-Cook-SCty-T24	4	7	9	12	14	16	0	0	0	0
Gas-Heat-NCty	34	42	55	64	76	88	0	0	0	0
Gas-Heat-NCty-T24	29	36	47	54	65	75	0	0	0	0
Gas-Heat-SCty	28	35	46	53	63	73	0	0	0	0
Gas-Heat-SCty-T24	24	30	39	45	54	62	0	0	0	0
Gas-Water-NCty	10	17	23	28	34	42	0	0	0	0
Gas-Water-NCty-T24	9	14	20	24	29	36	0	0	0	0
Gas-Water-SCty	9	14	19	24	29	35	0	0	0	0

Gas-Water-SCty-T24	8	12	16	20	25	30	0	0	0	0
Propane-Cook	20	24	30	35	41	47	0	0	0	0
Propane-Heat	130	153	172	191	210	229	0	0	0	0
Propane-Water	50	59	83	104	120	132	0	0	0	0
Sewer-Arroyo Grande	29	29	32	34	37	39	0	0	0	0
Sewer-Avila Beach	40	50	70	105	138	172	0	0	0	0
Sewer-Cambria	40	44	51	62	71	81	0	0	0	0
Sewer-Cayucos	96	96	96	96	98	98	0	0	0	0
Sewer-Grover Beach	41	41	41	41	41	41	0	0	0	0
Sewer-Morro Bay-Apts	80	80	80	80	80	80	0	0	0	0
Sewer-Morro Bay-SFR	100	100	100	100	100	100	0	0	0	0
Sewer-Nipomo-Apts	44	44	44	44	45	45	0	0	0	0
Sewer-Nipomo-SFR	52	52	52	52	54	54	0	0	0	0
Sewer-Oceano	10	10	10	10	10	10	0	0	0	0
Sewer-Paso Robles	44	52	66	88	114	137	0	0	0	0
Sewer-Pismo/Shell Beach-Apts	23	23	23	23	23	23	0	0	0	0
Sewer-Pismo/Shell Beach-SFR	36	36	36	36	36	36	0	0	0	0
Sewer-San Miguel-Apts	62	62	62	62	62	62	0	0	0	0
Sewer-San Miguel-SFR	105	105	105	105	108	108	0	0	0	0
Sewer-SLO	42	49	64	89	110	132	0	0	0	0
Sewer-Templeton	70	70	70	70	70	70	0	0	0	0
Solar - All Cities	1	1	1	1	1	0	0	0	0	0
Tenant Provided Range	11	11	11	11	11	11	0	0	0	0
Tenant Provided Refrigerator	12	12	12	12	12	12	0	0	0	0
Trash-Arroyo Grande	23	23	23	29	29	29	0	0	0	0
Trash-Atascadero	32	32	32	49	49	49	0	0	0	0
Trash-Avila Beach	25	25	25	42	42	42	0	0	0	0
Trash-Cambria	38	38	38	78	78	78	0	0	0	0
Trash-Cayucos	25	25	25	30	30	30	0	0	0	0
Trash-Creston	46	48	48	70	70	70	0	0	0	0
Trash-Grover Beach	21	21	21	28	28	28	0	0	0	0
Trash-Los Osos	25	25	34	54	54	54	0	0	0	0
Trash-Morro Bay	16	28	28	53	53	53	0	0	0	0
Trash-Nipomo	23	23	23	32	35	35	0	0	0	0
Trash-Oceano	17	17	17	24	24	24	0	0	0	0
Trash-Paso Robles	35	35	41	55	55	55	0	0	0	0
Trash-Pismo/Shell Beach	20	20	20	40	40	40	0	0	0	0
Trash-San Miguel	32	32	32	51	51	51	0	0	0	0
Trash-Santa Margarita	45	45	45	68	68	68	0	0	0	0
Trash-Shandon	44	44	44	62	62	62	0	0	0	0
Trash-SLO	13	19	19	38	38	38	0	0	0	0
Trash-Templeton	37	37	37	53	53	53	0	0	0	0
Water-Arroyo Grande	45	50	59	73	88	101	0	0	0	0
Water-Atascadero	42	42	52	62	71	84	0	0	0	0
Water-Avila Beach	47	50	68	91	120	145	0	0	0	0
Water-Cambria	64	73	100	149	197	253	0	0	0	0
Water-Cayucos	74	74	92	110	128	158	0	0	0	0

Water-Grover Beach	25	28	36	54	75	100	0	0	0	0
Water-Los Osos	54	63	81	110	137	173	0	0	0	0
Water-Morro Bay	58	66	81	99	129	158	0	0	0	0
Water-Nipomo	57	65	81	103	120	142	0	0	0	0
Water-Oceano	35	39	46	53	82	104	0	0	0	0
Water-Paso Robles	34	41	54	71	93	113	0	0	0	0
Water-Pismo/Shell Beach	16	22	33	50	67	84	0	0	0	0
Water-San Miguel	52	52	56	70	86	110	0	0	0	0
Water-Santa Margarita	70	74	84	98	115	130	0	0	0	0
Water-Shandon	74	75	84	102	129	152	0	0	0	0
Water-SLO	42	49	62	84	106	146	0	0	0	0
Water-Templeton	33	34	37	41	49	58	0	0	0	0

Actual Family Allowances – May be used by the family to compute allowance while searching for a unit.	Utility/Service/Appliance	Allowance
	Heating	
Head of Household Name	Cooking	
	Other Electric	
	Air Conditioning	
Unit Address	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Other	
Number of Bedrooms	Range/Microwave	
	Refrigerator	
	Total	

Current Year versus Prior Year Comparison

Housing Choice Voucher Utility Allowance Schedule

Reviewed:
 Revised & Reviewed:
 Implemented:

PART A

**U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
 HOUSING CHOICE VOUCHER ALLOWANCES FOR
 TENANT FURNISHED UTILITIES AND OTHER SERVICES**

HOUSING AUTHORITY OF THE CITY OF SAN LUIS OBISPO

UTILITY OR SERVICE	Studio		1-bdrm			2-bdrm		3-bdrm		4-bdrm		5-bdrm				
	PY	CY	PY	CY		PY	CY	PY	CY	PY	CY	PY	CY			
1. GAS for cooking, space heating, water heating; ELECTRICITY for lighting, refrigeration and small appliances. N County **New const after 1-1-03 w/Title 24 comp N County - Title 24	54	56	4%	72	74	3%	104	107	3%	124	128	3%	152	158		
	65	67	3%	87	89	2%	125	129	3%	148	153	3%	183	190		
	46	48	4%	61	63	3%	88	91	3%	105	109	4%	129	134		
2. GAS for space heating, water heating; ELECTRICITY for cooking, lighting, refrigeration and small appliances. N County Title 24 Compliant N County - Title 24	58	61	5%	76	79	4%	113	119	5%	141	149	6%	184	195		
	69	73	6%	91	95	4%	136	143	5%	169	178	5%	220	234		
	49	52	6%	64	66	3%	96	101	5%	120	127	6%	155	165		
3. ALL ELECTRIC N County Title 24 Compliant N County - Title 24	79	90	14%	112	128	14%	188	211	12%	231	260	13%	334	370		
	95	108	14%	134	154	15%	226	253	12%	277	312	13%	401	444		
	67	77	15%	95	109	15%	160	179	12%	196	221	13%	284	315		
4. ELECTRICITY for lighting, refrigeration and small appliances. N County Title 24 Compliant N County - Title 24	10	12	20%	13	15	15%	26	29	12%	32	36	13%	44	50		
	12	14	17%	16	18	13%	31	35	13%	38	43	13%	53	60		
	9	10	11%	11	13	18%	22	25	14%	27	31	15%	37	43		
5. WATER	Arroyo Grande	45	45	0%	50	50	0%	59	59	0%	73	73	0%	88	88	
	Atascadero	37	42	14%	37	42	14%	45	52	16%	55	62	13%	63	71	
	Avila Beach	47	47	0%	50	50	0%	68	68	0%	91	91	0%	120	120	
	Cambria	64	64	0%	73	73	0%	100	100	0%	149	149	0%	197	197	
	Cavucos	74	74	0%	74	74	0%	92	92	0%	110	110	0%	128	128	
	Grover Beach	25	25	0%	28	28	0%	36	36	0%	54	54	0%	75	75	
	Los Osos	52	54	4%	60	63	5%	77	81	5%	105	110	5%	137	137	
	Morro Bay	58	58	0%	66	66	0%	81	81	0%	99	99	0%	129	129	
	Nipomo	53	57	8%	60	65	8%	75	81	8%	98	103	5%	120	120	
	Oceano	32	35	9%	36	39	8%	42	46	10%	50	53	6%	75	82	
	Paso Robles	31	34	10%	38	41	8%	51	54	6%	71	71	0%	93	93	
	Pismo Beach/Shell Beach	15	16	7%	20	22	10%	31	33	6%	46	50	9%	67	67	
	San Luis Obispo	37	42	14%	46	49	7%	55	62	13%	74	84	14%	95	106	
	San Miguel	52	52	0%	52	52	0%	56	56	0%	70	70	0%	86	86	
	Santa Margarita	66	70	6%	70	74	6%	79	84	6%	92	98	7%	109	115	
	Shandon	69	74	7%	70	75	7%	79	84	6%	97	102	5%	129	129	
	Templeton	33	33	0%	34	34	0%	37	37	0%	41	41	0%	49	49	
	6. SEWER	Arroyo Grande	29	29	0%	29	29	0%	32	32	0%	34	34	0%	36	37
		Atascadero	40	40	0%	50	50	0%	70	70	0%	105	105	0%	138	138
		Avila Beach	38	40	5%	41	44	7%	48	51	6%	58	62	7%	71	71
Cambria		96	96	0%	96	96	0%	96	96	0%	96	96	0%	98	98	
Cavucos		41	41	0%	41	41	0%	41	41	0%	41	41	0%	41	41	
Grover Beach		100	100	0%	100	100	0%	100	100	0%	100	100	0%	100	100	
Morro Bay: SFR		80	80	0%	80	80	0%	80	80	0%	80	80	0%	80	80	
Morro Bay: Apts		52	52	0%	52	52	0%	52	52	0%	52	52	0%	54	54	
Nipomo: SINGLE FAM RES		44	44	0%	44	44	0%	44	44	0%	44	44	0%	45	45	
Nipomo: APTS		10	10	0%	10	10	0%	10	10	0%	10	10	0%	10	10	
Oceano		39	44	13%	48	52	8%	61	66	8%	82	88	7%	114	114	
Paso Robles		34	36	6%	34	36	6%	34	36	6%	34	36	6%	34	36	
Pismo Beach/Shell Beach: SINGLE FAM RES		22	23	5%	22	23	5%	22	23	5%	22	23	5%	22	23	
Pismo Beach/Shell Beach: APTS/MH		39	42	8%	46	49	7%	60	64	7%	89	89	0%	105	110	
San Luis Obispo		105	105	0%	105	105	0%	105	105	0%	105	105	0%	108	108	
San Miguel: SINGLE FAM ES		62	62	0%	62	62	0%	62	62	0%	62	62	0%	62	62	
San Miguel: Apts		70	70	0%	70	70	0%	70	70	0%	70	70	0%	70	70	
Templeton		18	23	28%	18	23	28%	18	23	28%	23	29	26%	23	29	
7. GARBAGE COLLECTION		Arroyo Grande	28	32	14%	28	32	14%	28	32	14%	43	49	14%	43	49
		Atascadero	19	25	32%	19	25	32%	19	25	32%	32	42	31%	32	42
	Avila Beach	24	38	58%	24	38	58%	24	38	58%	49	78	59%	49	78	
	Cambria	19	25	32%	19	25	32%	19	25	32%	23	30	30%	23	30	
	Cavucos	38	46	21%	38	48	26%	38	48	26%	55	70	27%	55	70	
	Creston	17	25	47%	17	25	47%	23	34	48%	37	54	46%	37	54	
	Grover Beach	17	21	24%	17	21	24%	17	21	24%	23	28	22%	23	28	
	Los Osos	12	16	33%	21	28	33%	21	28	33%	40	53	33%	40	53	
	Morro Bay	23	23	0%	23	23	0%	23	23	0%	32	32	0%	35	35	
	Nipomo	14	17	21%	14	17	21%	14	17	21%	20	24	20%	20	24	
	Oceano	35	35	0%	35	35	0%	41	41	0%	55	55	0%	55	55	
	Paso Robles	16	20	25%	16	20	25%	16	20	25%	32	40	25%	32	40	
	Pismo Beach/Shell Beach	11	13	18%	16	19	19%	16	19	19%	32	38	19%	32	38	
	San Luis Obispo	30	32	7%	30	32	7%	30	32	7%	47	51	9%	51	51	
	San Miguel	35	45	29%	35	45	29%	35	45	29%	53	68	28%	53	68	
	Santa Margarita	40	44	10%	40	44	10%	40	44	10%	57	62	9%	61	62	
	Shandon	35	37	6%	35	37	6%	35	37	6%	49	53	8%	53	53	
	Templeton															

 If it is not the policy of the owner to provide a range and/or refrigerator and the appliance is provided by the tenant,
 an appropriate amount shall be included in the tenant's "Allowance for Utilities" as follows:

RANGE: \$ 11
 REFRIGERATOR: \$ 12

MOBILE HOME SPACE RENT SUBSIDY:

Use 80 % of the above utility allowance for Gas, Electric, and Water if water is tenant's responsibility.
 Use full amount for Garbage if it is the tenant's responsibility.
 Sewer will usually be part of space rent; if not use full amount for sewer.

Reviewed:
Implemented:

PART B

**U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
SECTION 8 EXISTING HOUSING ALLOWANCES FOR
TENANT FURNISHED UTILITIES AND OTHER SERVICES**

HOUSING AUTHORITY OF THE CITY OF SAN LUIS OBISPO

UTILITY OR SERVICE	Studio			1-bdrm			2-bdrm			3-bdrm			4-bdrm			5-bdrm		
	PY	CY	0%	PY	CY	0%	PY	CY	0%	PY	CY	0%	PY	CY	0%	PY	CY	0%
GAS - Cooking, Space Heating and Water Heating. N County Title 24 Compliant N County - Title 24	44	44	0%	59	59	0%	78	78	0%	92	92	0%	108	108	0%	131	131	0%
	53	53	0%	71	71	0%	94	94	0%	110	110	0%	130	130	0%	157	157	0%
	37	37	0%	50	50	0%	66	66	0%	78	78	0%	92	92	0%	111	111	0%
	45	45	0%	60	60	0%	80	80	0%	94	94	0%	111	111	0%	133	133	0%
GAS - Space Heating & Water Heating N County Title 24 Compliant N County - Title 24	37	37	0%	49	49	0%	65	65	0%	77	77	0%	92	92	0%	108	108	0%
	44	44	0%	59	59	0%	78	78	0%	92	92	0%	110	110	0%	130	130	0%
	31	31	0%	42	42	0%	55	55	0%	65	65	0%	78	78	0%	92	92	0%
	37	37	0%	50	50	0%	66	66	0%	78	78	0%	94	94	0%	111	111	0%
GAS - Space Heating & Cooking N County Title 24 Compliant N County - Title 24	33	33	0%	43	43	0%	56	56	0%	67	67	0%	79	79	0%	92	92	0%
	40	40	0%	52	52	0%	67	67	0%	80	80	0%	95	95	0%	110	110	0%
	28	28	0%	37	37	0%	48	48	0%	57	57	0%	67	67	0%	78	78	0%
	34	34	0%	44	44	0%	57	57	0%	68	68	0%	81	81	0%	94	94	0%
GAS - Space Heating N County Title 24 Compliant N County - Title 24	28	28	0%	35	35	0%	46	46	0%	53	53	0%	63	63	0%	73	73	0%
	34	34	0%	42	42	0%	55	55	0%	64	64	0%	76	76	0%	88	88	0%
	24	24	0%	30	30	0%	39	39	0%	45	45	0%	54	54	0%	62	62	0%
	29	29	0%	36	36	0%	47	47	0%	54	54	0%	65	65	0%	75	75	0%
ELECTRIC - Lighting, Refrigeration, and small appliances N County Title 24 Compliant N County - Title 24	10	12	20%	13	15	15%	26	29	12%	32	36	13%	44	50	14%	59	66	12%
	12	14	17%	16	18	13%	31	35	13%	38	43	13%	53	60	13%	71	79	11%
	9	10	20%	11	13	15%	22	25	12%	27	31	13%	37	43	14%	50	56	12%
	10	12	17%	14	15	13%	26	30	13%	32	37	13%	45	51	13%	60	67	11%
ELECTRIC - Cooking, lighting, refrigeration & sm. Appliances N County Title 24 Compliant N County - Title 24	21	24	14%	27	30	11%	48	54	13%	64	72	13%	92	103	12%	125	141	13%
	25	29	16%	32	36	13%	58	65	12%	77	86	12%	110	124	13%	150	169	13%
	18	20	14%	23	26	11%	41	46	13%	54	61	13%	78	88	12%	106	120	13%
	21	25	16%	27	31	13%	49	55	12%	65	73	12%	94	105	13%	128	144	13%
ELECTRIC - Lighting, water heating, refrigeration & sm. Appliances N County Title 24 Compliant N County - Title 24	40	45	13%	53	60	13%	96	108	13%	117	132	13%	171	193	13%	228	257	13%
	48	54	13%	64	72	13%	115	130	13%	140	158	13%	205	232	13%	274	308	12%
	34	38	13%	45	51	13%	82	92	13%	99	112	13%	145	164	13%	194	218	13%
	41	46	13%	54	61	13%	98	111	13%	119	134	13%	174	197	13%	233	262	12%
ELECTRIC - Cooking, Water Heating, Lighting, Refrigeration & small appliances N County Title 24 Compliant N County - Title 24	52	59	13%	74	84	14%	126	142	13%	155	175	13%	225	250	11%	298	330	11%
	62	71	15%	89	101	13%	151	170	13%	186	210	13%	270	300	11%	358	396	11%
	44	50	13%	63	71	14%	107	121	13%	132	149	13%	191	213	11%	253	281	11%
	53	60	15%	76	86	13%	128	145	13%	158	179	13%	230	255	11%	304	337	11%
ELECTRIC - Space heating N County Title 24 Compliant N County - Title 24	22	25	14%	28	32	14%	51	57	12%	64	72	13%	95	105	11%	129	143	11%
	26	30	15%	34	38	12%	61	68	11%	77	86	12%	114	126	11%	155	172	11%
	19	21	14%	24	27	14%	43	48	12%	54	61	13%	81	89	11%	110	122	11%
	22	26	15%	29	32	12%	52	58	11%	65	73	12%	97	107	11%	132	146	11%
ELECTRIC - ALL ELECTRIC N County Title 24 Compliant N County - Title 24	79	90	14%	112	128	14%	188	211	12%	231	260	13%	334	370	11%	441	490	11%
	95	108	14%	134	154	15%	226	253	12%	277	312	13%	401	444	11%	529	588	11%
	67	77	14%	95	109	14%	160	179	12%	196	221	13%	284	315	11%	375	417	11%
	81	92	14%	114	131	15%	192	215	12%	235	265	13%	341	377	11%	450	500	11%
PROPANE - Cooking PROPANE - Cooking, Water Heating PROPANE - Cooking, Water Heating, Space Heating PROPANE - Space Heating	20	20	0%	24	24	0%	30	30	0%	35	35	0%	41	41	0%	47	47	0%
	70	70	0%	83	83	0%	113	113	0%	139	139	0%	161	161	0%	179	179	0%
	200	200	0%	236	236	0%	285	285	0%	330	330	0%	371	371	0%	408	408	0%
	130	130	0%	153	153	0%	172	172	0%	191	191	0%	210	210	0%	229	229	0%

RESOLUTION NO. 10 (2024 SERIES)

RESOLUTION APPROVING UTILITY ALLOWANCES FOR THE HOUSING CHOICE VOUCHER PROGRAMS

WHEREAS, the U.S. Department of Housing and Urban Development (“HUD”) requires an annual review of utility allowances; and

WHEREAS, the Housing Authority of the City of San Luis Obispo (“HASLO”) has conducted the review for the fiscal year ending September 30, 2023, for changes to allowances to be effective with annual reexaminations or new contracts entered into on or after April 1st, 2024; and

WHEREAS, in this review the revised allowances itemized in Exhibit A are considered to be sufficient to cover the costs of utilities for “energy efficient households” assisted under the Housing Choice Voucher Programs; and

WHEREAS, the allowances include reduced rates for income eligible households as allowed by the individual utility suppliers. HASLO will continue to encourage and seek reductions to rates for resident paid and HASLO paid allowances.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Housing Authority of the City of San Luis Obispo that the utility allowances attached as Exhibit A, meet the definitions required by HUD and are approved for implementation as of April 1st, 2024.

On motion of Commissioner _____, seconded by Commissioner _____, and on the following roll call vote:

AYES:

NOES:

ABSENT:

ABSTAINED:

The foregoing Resolution was duly adopted and passed this 18th day of January, 2024.

_____, **CHAIRMAN**

SEAL:

ATTEST:

SCOTT COLLINS, SECRETARY

January 12th, 2024

Re: HASLO Team Engagement and Organizational Strategy Effort – Final Report

Dear Commission:

HASLO engaged Koble Collaborative, Inc., (Koble) in July 2023 to lead the organization in a facilitated strategic planning process to assess the current internal conditions for all staff and to support leadership in developing goals and the prioritization of actions to improve the organization in 2024. This engagement was on the heels of the HASLO recently onboarding a new Executive Director and Board members, and hiring multiple new staff members across all departments within the organization. Thus, it was a perfect time to assess how things were going internally, and develop a plan to strengthen unity within the internal team.

Koble facilitated a comprehensive process, engaging the Board, leadership, and staff at all levels. The purpose for the deep engagement was to develop a foundation of collaboration, honest conversations, and focused decisions about what the team would need to be successful in 2024 and beyond.

Following an all staff survey, months of discussions with departments, and prioritization efforts by the Board and leadership, HASLO recently completed its Team Engagement and Organizational Strategy effort with Koble. Staff is now pleased to present the final report and corresponding organizational strategy guiding vision statements and values, and priority actions for 2024.

The Guiding Vision Statements are as follows:

- We connect people to HASLO's mission and the meaningful work we do every day.
- We create an inclusive work environment that fosters belonging, ensures all employees have a voice, and welcomes curiosity.
- We promote a supportive culture and bring a balance of work and play to each day.
- We empower people and ignite high performance, creative problem solving, and innovation.

The Guiding Values are as follows:

- We value all voices and empowered team members.
- We value sensitive candor and transparency.
- We value grace and compassion.
- We value curiosity in our approach to people and work.
- We value a willingness to grow.

In order to achieve this vision, the strategic plan outlines numerous priority actions for 2024 within the five areas:

- Communications
- Staff support tools
- Innovation
- Training
- Funding


Staff believe that the priority action items, if implemented, will help position HASLO as one of the best places to work in SLO County. Staff are excited about this effort, and are already working to implement the priority action items in five Working Groups.

HASLO Staff and Koble recommended a two-year approach to creating a long-term strategic plan. Year 1 of the plan consisted of phases of the internal engagement through implementation of priority action items. Staff will come back to the Board regarding Year 2 later in 2024, which will focus on future planning for the organization's long-term success and sustainability. That effort will include the more traditional components of strategic planning, such as conducting outreach to external stakeholders and developing goals and objectives related to long-term vision of success for HASLO.

Attached the Board will find the Final Report and multiple corresponding attachments.

Attachments

- HASLO's 2024 Team Engagement & Organizational Strategy - Final Report
- Appendix A-a – All Staff Survey Summary and Team meeting notes
- Appendix A-b – Themes from Pre-Session Team Meetings
- Appendix B – SWOT Analysis Summary
- Appendix C – Visioning Session Summary
- Appendix D-a – Working Group's Assigned Actions
- Appendix D-b – Working Group's Needs for Successful Implementation of Priority Actions



**HASLO's 2024 Team Engagement
& Organizational Strategy
Final Report**

**Created for:
Housing Authority of San Luis Obispo**

Created by:
Koble Collaborative, Inc.
December 2023

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SECTION 1. Project Overview

Since 1968, the Housing Authority of San Luis Obispo (HASLO) has built and maintained affordable housing for citizens in this community. With a change in leadership and a growing team, 2023 was the optimal time to start charting a new course for HASLO's future. In July 2023, HASLO hired Koble Collaborative, Inc. (KCI) to engage the organization in a facilitated strategic planning process to assess the current internal conditions for all staff and to support leadership in developing goals and the prioritization of actions to improve the organization in 2024.

Strategic planning allows HASLO to assess its current state, continue building stronger team dynamics around mutual goals, adapt to the ever-changing conditions of the industry, and directly contribute to the creation of its best future.

HASLO embarked on the first two phases of strategic planning in August 2023. The 2023 focus centered on building strength and unity within the internal team by developing a foundation of collaboration, honest conversations, and focused decisions about what the team and internal organization would need in 2024. This strengthened internal base will then allow HASLO to turn its attention to defining a long-term strategic plan for what success looks like for the organization in 2028 and beyond. This report summarizes *Phase 1: Year 1 Strategic Framework* and *Phase 2: Year 1 Accountability in Action* to define internal strategies needed to best support the organization and team dynamics. In mid-to late-2024, HASLO is considering pursuing *Phase 3: Year 2-5 Strategic Plan* work to focus on longer term, external priorities of the organization.

This report summarizes the *2024 Housing Authority of San Luis Obispo (HASLO) Team Engagement and Organizational Strategy* process and key outcomes. Further details of each phase of the project's outcomes can be found in the appendices. This dynamic document outlines the organization's vision for what the company will become internally and creates priority actions to move towards that. **Figure 1** below provides a snapshot of two key project outcomes: Guiding Vision statements and the 2024 priority actions connection to each statement.

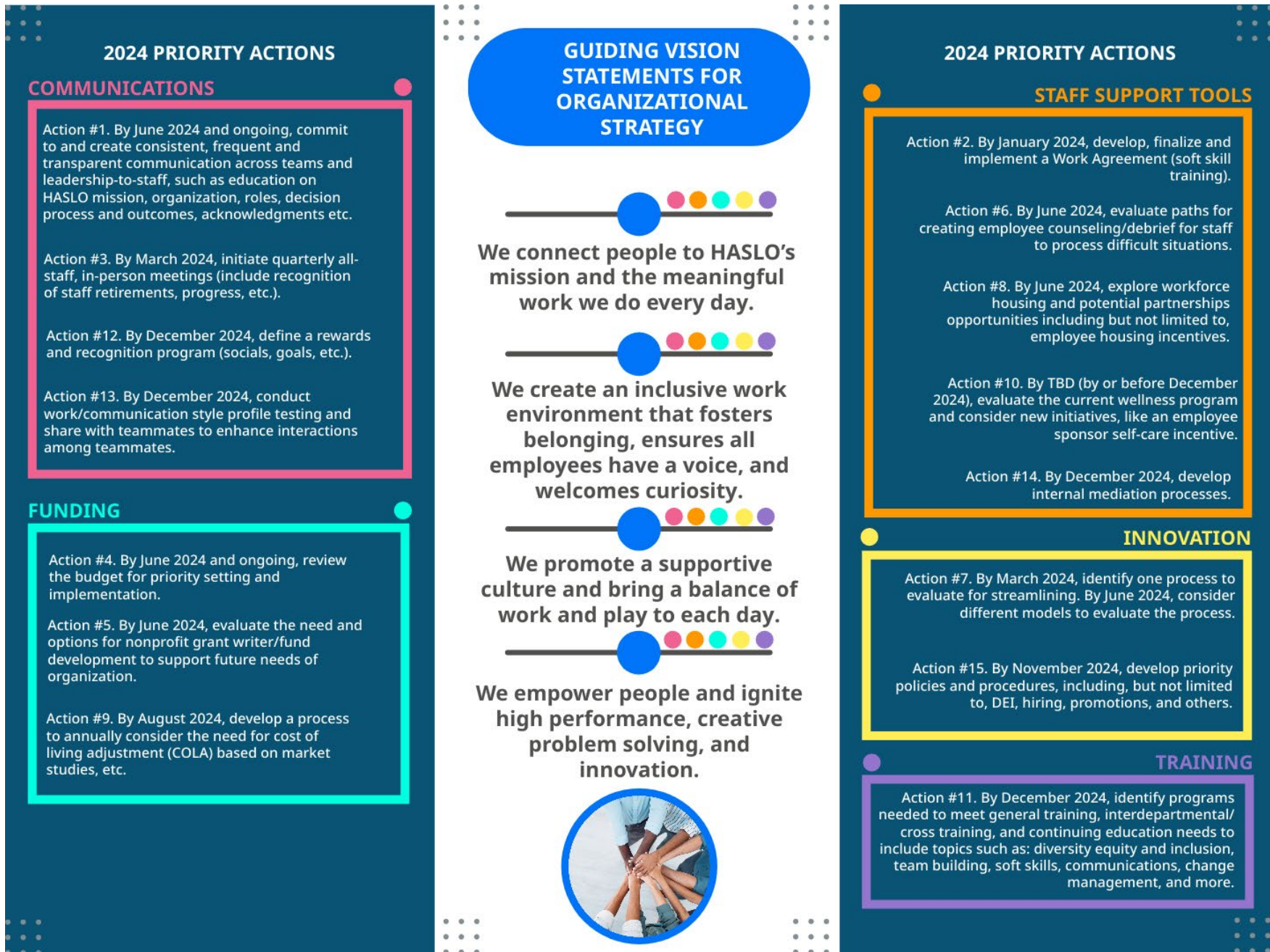


Figure 1. Guiding Vision Statements and Connection to 2024 Priority Actions

SECTION 2. Team Engagement and Organizational Vision

On October 26, 2023, KCI facilitated an all day Visioning Session with HASLO's leadership team and Board of Directors. Participants totaled 17, including one person attending the session via Zoom.

During this interactive session, the team synthesized an internal Vision of Greatness for the agency over the next five years, obstacles that might hinder efforts in achieving that vision, and actionable steps to take towards that vision (which may lean on agency strengths and combat weaknesses/obstacles). In discussing these three topics, the team built upon outcomes from the HASLO All-Staff Survey results, the seven Pre-Session Team Meeting key takeaways, and the SWOT Session summary. **Appendix C** provides detailed notes from the session.

Following the session, the HASLO Executive Team continued to refine the important input from the session into succinct Guiding Vision Statements and Guiding Values, listed below. These statements set the foundation for where and how HASLO will focus its energy in 2024.

Organizational Strategy Guiding Vision Statements

HASLO is driving forward positive change to become an incredible organization to work for. Over the next five years, we will shape the agency together, at all levels, with these Guiding Vision statements and values at the heart of all organizational change.

- *We connect people to HASLO's mission and the meaningful work we do every day.*
- *We create an inclusive work environment that fosters belonging, ensures all employees have a voice, and welcomes curiosity.*
- *We promote a supportive culture and bring a balance of work and play to each day.*
- *We empower people and ignite high performance, creative problem solving, and innovation.*

Organizational Strategy Guiding Values

We, as a team, show up to our work guided by our shared values:

- *We value all voices and empowered team members.*
- *We value sensitive candor and transparency.*
- *We value grace and compassion.*
- *We value curiosity in our approach to people and work.*
- *We value a willingness to grow.*

SECTION 3. 2024 Priority Actions & Year 1 Implementation

This section reflects key outcomes from two half-day sessions.

The first session was on November 6, 2023. KCI facilitated a half-day session with HASLO's leadership team to prioritize actions for 2024. Participants totaled 17, one attending virtually via Microsoft TEAMS.

During this session, the leadership team discussed action items that emerged from the Visioning Session in both small groups and whole group format. Small groups utilized a matrix to determine together whether possible action items or strategies were Important/Unimportant and Urgent/Non-Urgent. Following the small group settings, all four groups combined their thinking into one large matrix to allow space for discussion on each item. Out of this process emerged a set of priorities for 2024, which were further refined by KCI, the HASLO Executive Director and the Executive Team into actionable items listed in **Table 1** below. Actions prioritized for the first half of 2024 were considered both important and urgent by HASLO's leadership team, while actions prioritized for the second half of 2024 were important but less urgent.

Table 1. Final 2024 Action List & Deadlines

Actionable Efforts December 2023 - June 2024:	
Item No.	Action
1	<i>By June 2024 and ongoing, commit to and create consistent, frequent and transparent communication across teams and leadership-to-staff, such as education on HASLO mission, organization, roles, decision process and outcomes, acknowledgments etc.</i>
2	<i>By January 2024, develop, finalize and implement a Work Agreement (combined with soft skills training to support the Agreement).</i>
3	<i>By March 2024, initiate quarterly all-staff, in-person meetings (include recognition of staff retirements, progress, etc.).</i>
4	<i>By June 2024 and ongoing, review the budget for priority setting and implementation.</i>
5	<i>By June 2024, evaluate the need and options for nonprofit grant writer/fund development to support future needs of organization.</i>
6	<i>By June 2024, evaluate paths for creating employee counseling/debrief for staff to process difficult situations.</i>
7	<i>By March 2024, identify one process to evaluate for streamlining. By June 2024, consider different models to evaluate the process.</i>
8	<i>By June 2024, explore workforce housing and potential partnerships opportunities including but not limited to, employee housing incentives.</i>
Actionable Efforts July 2024 - December 2024:	
Item No.	Action
9	<i>By August 2024, develop a process to annually consider the need for cost of living adjustment (COLA) based on market studies, etc.</i>
10	<i>By June 2024, evaluate the current wellness program and consider new initiatives, like an employee sponsor self-care incentive.</i>
11	<i>By December 2024, identify programs needed to meet general training, interdepartmental/cross training, and continuing education needs to include topics such as: diversity equity and inclusion, team building, soft skills, communications, change management, and more.</i>
12	<i>By December 2024, define a rewards and recognition program (socials, goals, etc.).</i>
13	<i>By December 2024, conduct work/communication style profile testing and share with teammates to enhance interactions among teammates.</i>
14	<i>By December 2024, develop internal mediation processes.</i>

15	<i>By November 2024, develop priority policies and procedures, including, but not limited to, DEI, hiring, promotions, and others.</i>
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The second session was on November 13, 2023. KCI facilitated the final half-day session, Year 1 Implementation, with HASLO's leadership team.

Participants totaled 19, including one virtual attendant via Microsoft TEAMS.

This session focused on the logistical implementation of actions selected during the Prioritizing Action session. Based on the outcomes of the former session and working in conjunction with the Executive Team, KCI developed groupings of action statements into the following five work groups for implementation: Communications, Innovation, Staff Support Tools, Training, and Funding. During the session, participants were able to self-select into their preferred work group.

The final actions are categorized by work groups as follows:

- **Communications Work Group** - Oversees Action Item No. 1, 3, 12, and 13. At the time of this report, Work Group members leading these actions include: Sandra Bourbon, Vicky Culman, Jenna Franz, and MaryBell Soto.
- **Staff Support Tools Work Group** - Oversees Action Item No. 2, 6, 8, 10, and 14. At the time of this report, Work Group members leading these actions include: Michael Burke, Karen Grisso, Kerry Wilson, and Traci Walker.
- **Innovation Work Group** - Oversees Action Item No. 7 and 15. At the time of this report, Work Group members leading these actions include: Michelle Pedigo, Gabby Feighner, and Hosanna Wendt.
- **Training Work Group** - Oversees Action Item No. 11 (item is then split between four categories of training). At the time of this report, Work Group

members leading these actions include: Scott Collins, Abel Gutierrez, Veronica Ciscneros, and Chris Compos.

- **Funding Work Group** - Oversees Action Item No. 4, 5, and 9. At the time of this report, Work Group members leading these actions include: Ken Litzinger, Clover Robinson, and Dean Nicolds.

During the session, each Work Group did initial work to define each Action Item's final intended deliverable or outcome, how HASLO would know or measure completion of the action, and implementation steps, timing, resource(s) needed, and responsible person(s) needed to achieve that final intended deliverable or outcome. **Appendices E-a** provides summary work plans for each Work Group's action items in an editable spreadsheet format, as these are meant to be dynamic and updated by the work groups as they continue their planning and implementation work throughout 2024.

These strategic initiatives are part of an organizational evolution-strengthening the team's unity and making work easier over time. However, it takes effort by the Working Groups to initiate and lead these actions. As a final element of this session, participants talked through the needs for this process and each of these initiatives to be completed effectively. The leadership team voiced their thoughts on what each work group would need from the organization and from each other in order to effectively implement priority actions identified for 2024. The team discussed future needs and challenges, developed potential solutions and approaches for each, and laid out ideas for effective communication and support. Among other things, as work groups lead these priority actions, the following principles should underlie all actions and *how* teams approach actions:

- Recognize this entire process is an evolution with the aim to strengthen team unity and ultimately make work easier
- Aim for positive progress and an openness to learn along the way, not perfection
- Create dedicated work time to participate in developing these strategic initiatives, while recognizing these actions are being pursued in addition to existing work priorities and already full workloads. So allow grace, too.

- Build and strengthen teams
- Focus on leaders' capacity for positive influence within the organization
- Be curious, adaptable, and willing to change

A detailed summary can be found in **Appendix E-b**.

SECTION 4. HASLO's SWOT Analysis

On October 4, 2023 KCI facilitated a half-day SWOT session with HASLO's Executive Team and Managers. Participants totaled 12.

The SWOT analysis refers to the process of documenting HASLO's current internal Strengths and internal Weaknesses as it relates to the organization's capacity to complete its mission, staff's ability to do their jobs well, and overall team dynamics. The SWOT analysis also refers to the process of identifying externalities that might pose as either an Opportunity or a Threat to HASLO's ability to complete its mission, support its staff and function well.

The team considered input from the 2023 All Staff Survey results and input gathered from staff during each pre-session meeting. While the participants developed longer lists for each category below, **Table 2** includes the top five priorities for each SWOT category as identified by HASLO's Leadership Team during the session. **Appendix B** provides summary notes from the session.

This analysis serves as a foundation for strategic planning-as HASLO considers its future vision as an organization/employer and what will be needed to accomplish that. HASLO should continue to look back at this SWOT to look for

opportunities or challenges that lie ahead, strengths that can be relied on within the organization, and organizational weaknesses that may hinder efforts.

Table 2. 2023 Top Five Priorities for SWOT

<p style="text-align: center;">Top Strengths</p> <ol style="list-style-type: none"> 1. Forward-thinking/innovative; Leadership; Vision 2. Compassion; Trust/care for staff 3. Open door policy; Openness; Accessibility 4. Making investments in staff/other areas; Team support 5. Dedicated staff; Committed to our purpose; Meaning and compassion 	<p style="text-align: center;">Top Weaknesses</p> <ol style="list-style-type: none"> 1. Lack of work-life balance; Burnout; Overwhelm; Inability to take time off; Lack of workload/caseload balance 2. Limited collaboration; Limited inter-department collaboration and dynamics 3. Lack of communication across organization and team building; trickle down communications 4. Need policies and procedures 5. Turnover/retention
<p style="text-align: center;">Top Opportunities</p> <ol style="list-style-type: none"> 1. Market rate housing for employees; Workforce housing 2. Partnerships (nonprofits, governments); Strengthen outside collaborations with vendors (client support) 3. Grant writer; Pursue philanthropic funding 4. Internships, Federal work study programs and/or next generation staffing; Cuesta, Cal Poly; Eckerd for unemployed clients 5. Cross-collaboration with partner agencies for training opportunities 	<p style="text-align: center;">Top Threats</p> <ol style="list-style-type: none"> 1. Change overload 2. Inflation; cost of living 3. Compliance changes; HUD regulations 4. Government shutdowns; Federal/State/County funding 5. Expectations of HASLO; Community perceptions and support

SECTION 5. Staff Survey and Team Session Inputs

A foundational aspect of this strategy development was to learn from and listen to all staff in order to understand the current state of the organization and the needs and hopes for the future of the internal organization. KCI conducted an anonymous all-staff survey, along with seven team meetings in order to hear input and ideas from all voices in the organization.

The anonymous All-Staff Survey was distributed between August 7-18, 2023. Of the 80 employees who received the survey 70 responded, yielding an overall response rate of 87.5%. Of those responses, there was a 93% completion rate. Participants highlighted organizational strengths and shared many ideas for how HASLO could continue to improve.

In August and September 2023, KCI facilitated seven pre-session meetings with each of the HASLO teams and the Board (see **Table 3** for dates). Sessions focused on three main questions: *What does HASLO do well?; What could HASLO improve on?; and What is something HASLO doesn't do that you wish the organization did?* **Appendices A-a and A-b** provide an executive summary of survey findings and detailed notes from all seven sessions.

Table 3. Pre-session Team Meetings Dates

Date	Team(s) Attending Session
8/17/2023	Board of Commissioners
8/17/2023	Finance and Construction Teams
8/24/2023	Resident Services and Executive Teams
8/30/2023	Section 8 Team
8/30/2023	Property Management Team
8/30/2023	Support Services Team
9/18/2023	Maintenance Team

SECTION 6. Conclusion

Immense work was put into this strategic process by all levels of HASLO with the aim of understanding the current reality of the organization as well as its desired future reality. The 2023 focus centered on building strength and unity within the internal team by developing a foundation of collaboration, honest conversations, and focused decisions about what the team and internal organization would need in 2024.

Results from the All-Staff Survey, seven pre-session meetings, and four leadership sessions revealed many organizational strengths including a sense of doing meaningful work, good inner-team relationships, a positive and inviting work environment, caring leadership, quality customer service, and clear expectations. Simultaneously, input revealed a need for more consistent communication and transparency, improved interdepartmental understanding, team building, clear and consistent written policies and procedures, focus on staff support and wellbeing, diversified training, along with others.

Based on experience, pre-session data and facilitated sessions, HASLO's leadership team then determined a vision of the future organizational reality and planned out key priority actions to move towards that in 2024. This strengthened internal base will then allow HASLO to turn its attention to defining a long-term strategic plan for what success looks like for the organization in terms of its external impact in 2028 and beyond.

HASLO continues to push forward with openness and earnest desire for positive growth. In order to maintain this positive momentum towards their vision for greatness internally, KCI has the following recommendations for HASLO:

1. **Survey:** Create a schedule for an annual all-staff employee engagement survey. To start, conduct a follow-up, all staff survey in mid to late 2024. KCI recommends using the same quantifiable questions in order to allow comparison of results to the baseline survey results. By conducting this annually, HASLO would be able to identify trends and changes in the organization over time.
2. **Communications:** In order to reach HASLO's vision of clear and consistent communications, KCI recommends:
 - a. Schedule the four quarterly all-staff gatherings early in 2024 so that staff knows when to expect gatherings and has a sense of progress from their input right away. HASLO's Executive Director should also make it clear that gatherings are mandatory, in-person, fun, and important for team building and overall organizational awareness (unless decided otherwise).
 - b. HASLO Executive Team works with managers and supervisors to ensure cross-department awareness and create the expectation that all in leadership need to be keeping staff informed on a regular basis. This will help to create an environment of connectedness and transparency.
3. **Implementation:** In order to maintain momentum on 2024 Priority Action implementation, KCI recommends:
 - a. Schedule the monthly inter-Work Group meetings.

- b. Early in 2024, Executive Team schedule the time blocking dates/days to allow for Work Groups to meet and make progress on their assigned priority actions.
 - c. Executive Director, or appointee, develops a singular shared template for monthly Work Group progress updates and communications. This ensures consistent communications, streamlines monthly inter-Work Group meetings, and eases burden on each Work Group.
 - d. Executive Director, or appointee, encourages progress and makes adjustments to Work Group teams, action steps, and/or timelines as needed to ensure HASLO's priority actions can be implemented most effectively.
4. **Strategic Planning:** HASLO did deep work to focus on internal needs of the organization in 2023. KCI recommends that in mid-to-late 2024 (or when the timing best fits HASLO's needs), HASLO conduct further strategic planning processes to focus its long term, external goals and development.

Appendices: Key Outcomes & Session Notes

KCI provided detailed deliverables after each milestone. Key documents are included as appendices here in order to allow HASLO to easily reference information that led to the major outcomes detailed in the report above.

Presentation: All-Staff Survey & Teams' Input

All-Staff Survey Overview

- August 7, 2023 until August 18, 2023
- Of the 80 employees who received the survey, 70 responded for an overall response rate of 87.5%
- 93% completion rate
- 47 survey questions (some questions include subparts which are not accounted for in this number)
- Overall assessment of current employee engagement, team dynamics, and organizational culture for HASLO at all levels of the organization

General Measures

- 70% or more is considered a strength
- 30% or more negative is considered a challenge
- 25% or more combined fairly neutral responses suggests uncertainty, presenting an opportunity for communication within organization

Using a binary breakdown (+/-), HASLO has 27 strength items (of 36 total questions) and 9 challenge items (of 36 total questions)

Survey-Identified Positive Highlights

Due to the large number of strengths identified at the 70% agreement threshold, we used the threshold of 90% agreement to identify the top strengths, according to the survey.

97%

I know what is expected of me at work.

95%

My associates or fellow employees are dedicated to doing quality work.

94%

The mission or purpose of my company makes me feel my job is important.

93%

My immediate supervisor, or someone at work, seems to care about me as a person.

91%

If needed, I feel comfortable asking my supervisor when I need help, when I cannot handle a certain workload or task, and/or when I feel overwhelmed by my responsibilities.

90%

My organization is dedicated to diversity and inclusiveness.

90%

I have a friend at work.

Survey-Identified Areas for Improvement

We used the threshold of 30% disagreement to identify the top areas for improvement, according to the survey. Percentages represent disagreement, unless noted by * which signifies agreement.

58%

There are things that have broken down and have not been addressed.*

37%

There is positive communication between all levels of staff.

45%

In the last year, my manager(s) checked in with me about opportunities for growth or potential development paths.

37%

Concerns may be voiced without repercussion.

41%

In my direct working knowledge, new staff on my team get properly (*) trained for their role and feel ready for their responsibilities.

32%

Everyone's voice is heard and valued.

37%

I often feel overwhelmed by the amount of change I experience in my role, projects I am involved in, and/or the organization. *

31%

The workload is spread fairly among team members.

30%

In the last seven days, I have received recognition or praise for my work from a supervisor and/or teammate.

Qualitative Survey Question Highlights

Although there are more open-ended questions in the survey, we focused on Questions 10 and 11—**current vs. ideal work environments**— as it might inform the Vision for the Future discussion today.

What is your current working environment?

- **Busy**, stressful, distracting, fast-paced, productive, intense workloads
- Care, cooperative, **collaborative**, listened to, **friendly**, helpful, safe, secure, welcoming, respectful
- Dedicated, hard-working
- Challenging
- Tension
- Clean, organized
- Siloed, independent, autonomous
- Improving, transitioning
- Level of flexibility (some say inflexible, others say flexible)
- Unclear policies and procedures, lacks structure, shared confusion
- Good/**positive environment**
- Important work
- Relaxed, calm, peaceful, quiet
- Resentment, retaliatory
- Gossip, slander, defensiveness
- Double standard, inconsistency, not fair
- Open-door policy with upper management
- Varied responses relating to difficulty asking other departments for help

What is your ideal working environment?

- Safe, Innovative with psychological safety, more planning-less reaction
- Friendly, kindness, caring, encouraging, appreciated, valued, considerate, inclusive, healthy and productive working relationships, professional environment, respected boundaries and workspace, no drama
- Diverse
- Flexibility, hybrid, 4-10 schedule
- Good communication, full disclosure, trust, open to bring up concerns
- Autonomous, create own work plan
- Supervisor available and open, strong management that's approachable and supportive, understand diversity of populations served, recognize individual strengths, treat equally
- Growth and creativity encouraged, challenging
- Cooperation, collaboration, teamwork, team building, supportive, cohesive, not siloed
- Opportunities to work or break outside
- Fun, joyful, interactive, good attitudes
- Goal oriented, mission-driven
- Cohesive, not competitive, share information
- Busy, calm
- Recognition, good feedback
- Share knowledge
- Quiet, offices with closed doors (client calls)
- Vacation is an option (without being buried)
- Fair pay
- More space, clean, happier office decor, standing desk, windows open for fresh air, plants
- Weekly meetings (online option)
- Training, straightforward/written policies and procedures, not straying from Fair Housing recommended policies, enforcement of lease, clear structure and division of labor
- Tools needed to do best work

Pre - Session Team Meeting Takeaways

- Six team meetings and one Board meeting held
- All employees attended meetings in-person
- Many great strengths, areas for improvement and ideas were offered up—some team-specific, some agency-wide



Board: What would be a success?

- All staff/Board will be able to give "elevator pitch" about HASLO's mission/strategies
- Communications between staff and residents, Executive Director and Board
- Deeper understanding of structure of HASLO and staff
- Uniting all staff
- Buy-in

Board: What would be a failure?

- Not feeling valued or heard
- Misunderstanding
- Not meeting timeframes
- Waste of staff and volunteer time, without a clear path forward
- Board and staff "tuned out," just smiling and nodding

HASLO's Strengths (themes)

- HASLO is mission & service driven; public face (23%)
- Flexibility & preparedness of staff (18%)
- Teamwork & team dynamics (13%)
- Client/customer service (8%)
- Management & leadership (6%)
- Collaboration (external) (6%)
- Staff treatment & standards (6%)

HASLO's Weaknesses (themes)

- Policy & procedure (16%)
- Workload (13%)
- Opportunities to interact with all teams (9%)
- Training & staff development (10%)
- Communications (internal) (7%)
- Collaboration (internal) (7%)
- Communications (external) (6%)
- Schedule flexibility (3%)
- Teamwork & team dynamic (3%)
- Technology (3%)
- Change management (3%)

Wish HASLO did/had (themes)

- Opportunities to interact with all teams (18%)
- Training & staff development (16%)
- Communications (internal) (11%)
- Technology (9%)
- Appreciation & recognition (9%)
- Collaboration (internal) (8%)
- Policy & procedure (7%)
- Self care (4%)
- Work environment (3%)
- Resources (3%)
- Organizational effectiveness & culture
- Schedule flexibility
- Benefits
- Belonging and diversity
- Flexibility & preparedness of staff
- Opportunities to learn from other organizations
- Staff treatment & standards
- Succession planning/knowledge sharing
- Workload

Themes from HASLO 2023 Pre-Session Team Meetings

Themes	Success/Failure of Project		Strength		Weakness		Future Ideas	
	17	% by theme	80	% by theme	90	% by theme	90	% by theme
Accountability & monitoring	0	0.0%	0	0.0%	2	2.2%	0	0.0%
Advocacy	0	0.0%	0	0.0%	1	1.1%	0	0.0%
Appreciation & recognition	0	0.0%	0	0.0%	1	1.1%	8	8.9%
Belonging & diversity	0	0.0%	0	0.0%	2	2.2%	1	1.1%
Benefits	0	0.0%	0	0.0%	0	0.0%	1	1.1%
Change management	0	0.0%	0	0.0%	3	3.3%	0	0.0%
Client/customer service	0	0.0%	6	7.5%	1	1.1%	0	0.0%
Collaboration (external)	0	0.0%	5	6.3%	1	1.1%	0	0.0%
Collaboration (internal)	0	0.0%	2	2.5%	6	6.7%	7	7.8%
Communications (external)	0	0.0%	0	0.0%	5	5.6%	0	0.0%
Communications (internal)	0	0.0%	1	1.3%	6	6.7%	10	11.1%
Compassionate; care but fair	0	0.0%	3	3.8%	0	0.0%	0	0.0%
Consensus on clear goals and path forward	10	58.8%	0	0.0%	0	0.0%	0	0.0%
Decision making	0	0.0%	0	0.0%	1	1.1%	0	0.0%
Evolving business practices; Adaptability	0	0.0%	0	0.0%	1	1.1%	0	0.0%
Flexibility & preparedness of staff	0	0.0%	14	17.5%	0	0.0%	1	1.1%
HASLO mission & service driven & public face	0	0.0%	18	22.5%	0	0.0%	1	1.1%
Improve dynamics between HASLO and clients	3	17.6%	0	0.0%	0	0.0%	0	0.0%
Management & leadership	0	0.0%	5	6.3%	0	0.0%	0	0.0%
Open to risk and learning	0	0.0%	1	1.3%	0	0.0%	0	0.0%
Opportunities to interact with all teams	0	0.0%	4	5.0%	8	8.9%	16	17.8%
Opportunities to learn from other organizations	0	0.0%	0	0.0%	0	0.0%	1	1.1%
Organization of teams	0	0.0%	0	0.0%	1	1.1%	0	0.0%
Organizational effectiveness and culture	4	23.5%	0	0.0%	0	0.0%	2	2.2%
Policy & procedure	0	0.0%	0	0.0%	14	15.6%	6	6.7%
Priorities	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Resources	0	0.0%	0	0.0%	1	1.1%	3	3.3%
Schedule flexibility	0	0.0%	0	0.0%	3	3.3%	1	1.1%
Self care	0	0.0%	0	0.0%	1	1.1%	4	4.4%
Staff retention	0	0.0%	0	0.0%	1	1.1%	0	0.0%
Staff treatment & standards	0	0.0%	5	6.3%	2	2.2%	1	1.1%
Succession planning/knowledge sharing	0	0.0%	0	0.0%	1	1.1%	1	1.1%
Teamwork & team dynamic	0	0.0%	10	12.5%	3	3.3%	0	0.0%
Technology	0	0.0%	0	0.0%	3	3.3%	8	8.9%
Training & staff development	0	0.0%	3	3.8%	9	10.0%	14	15.6%
Work environment	0	0.0%	3	3.8%	1	1.1%	3	3.3%
Workload	0	0.0%	0	0.0%	12	13.3%	1	1.1%

What would make this current Team Engagement and Organizational Strategy project a big success? A failure?

Date	Team/Session	Comment
8/17/23	Board	Success: Use positive motives to help people, like hand on shoulder to guide (e.g. don't smoke on property in a kind way)
8/17/23	Board	Success: Board follow Scott's example to visit complexes and meeting people
8/17/23	Board	Success: Having a clear growth objective/plan and how to flex for that growth
8/17/23	Board	Success: All staff/Board will be able to give "elevator pitch" about HASLO's mission and strategies
8/17/23	Board	Success: Communications between staff and residents
8/17/23	Board	Success: Deeper understanding of structure of HASLO and staff
8/17/23	Board	Success: Continued improved communication between ED and Board (currently much improved)
8/17/23	Board	Success: Uniting all staff and Commissioners (all understand the Mission)
8/17/23	Board	Success: Buy-in
8/17/23	Board	Success: Easily understood wording and direction
8/17/23	Board	Success: The goal
8/17/23	Board	Failure: Not feeling valued
8/17/23	Board	Failure: Misunderstanding
8/17/23	Board	Failure: Not meeting timeframes
8/17/23	Board	Failure: Waste of staff and volunteer time, without a clear path forward
8/17/23	Board	Failure: Board and staff "tuned out," just smiling and nodding; no Buy-in
8/17/23	Board	Failure: Not heard

What does HASLO as an organization do well?

Date	Team/Session	Comment	KCI additional notes
8/17/23	Board	Name is well known in community (positively)	
8/17/23	Board	Trains staff	
8/17/23	Board	Always trying to serve as many clients as possible	
8/17/23	Board	Collaboration/collaborate well with partners	
8/17/23	Board	Treat employees like family	
8/17/23	Board	Listen well kind interactions with people	
8/17/23	Board	Read the staff reports! It's all there (i.e. prepared, providing Board info)	
8/17/23	Board	Reaching out to external agencies (Cities, County, State, Federal) on all needs	
8/17/23	Board	Reach out to residents	
8/17/23	Board	Attitude!	
8/17/23	Board	Develops low income housing countywide very well	
8/17/23	Finance & Construction	New developments	
8/17/23	Finance & Construction	Provide housing	
8/17/23	Finance & Construction	Finding funding for housing	
8/17/23	Finance & Construction	Long range planning for future projects	
8/17/23	Finance & Construction	Trust each other	
8/17/23	Finance & Construction	Production of housing	
8/17/23	Finance & Construction	Conscious of the need for more housing	
8/17/23	Finance & Construction	Work great as an agency	
8/17/23	Finance & Construction	Creates a comfortable personable environment	
8/17/23	Finance & Construction	Outreach to the community for more landlords	
8/17/23	Finance & Construction	Help team members	If you need support its there, and vice versa. Helps you feel valued in your team,
8/17/23	Finance & Construction	Financial stability/strength	
8/17/23	Finance & Construction	Have fun!	
8/17/23	Finance & Construction	Supportive family friendly organization	
8/17/23	Finance & Construction	Take care of their employees	
8/17/23	Finance & Construction	Continue to grow to best serve those in need	
8/17/23	Finance & Construction	Help the community	
8/17/23	Finance & Construction	Directly improves people's quality of life	
8/24/23	Executive & Res. Svc.	Develops affordable housing well	
8/24/23	Executive & Res. Svc.	New ED and office move, created more opportunities to interact with staff	
8/24/23	Executive & Res. Svc.	Flexible/adaptable	HASLO as agency and each individual, there's a lot of flexibility
8/24/23	Executive & Res. Svc.	Problem-solving	Folks solve problems all day long, esp. important when work revolves around people
8/24/23	Executive & Res. Svc.	New administration is focused on improvement and positive change	
8/24/23	Executive & Res. Svc.	Mission Statement	Good statement
8/24/23	Executive & Res. Svc.	Meeting the needs of residents	
8/24/23	Executive & Res. Svc.	Good internal team dynamics e/i Resident Services	Within Resident Services
8/24/23	Executive & Res. Svc.	Good community collaboration with outside agencies and approachability	
8/24/23	Executive & Res. Svc.	Approachability of HASLO	

What does HASLO as an organization do well?

Date	Team/Session	Comment	KCI additional notes
8/30/23	Section 8	Team support	everyone gets and helps everyone out
8/30/23	Section 8	adaptability	
8/30/23	Section 8	customer service	lots of phone calls that appreciate being met with a live person
8/30/23	Section 8	training	not only an improvement, but now they are involved and stay with all the changes
8/30/23	Section 8	caring	agency cares for its employees
8/30/23	Section 8	connectedness	connected minds. easy and safe to talk with one another
8/30/23	Section 8	prompt customer service	prompt and timely. someone is always available to address customer concerns
8/30/23	Section 8	adaptable flexibility	flexibility in schedules to be able to do what you need to do, to get to request what you need like headphones for meetings without feeling like a burden to anyone
8/30/23	Section 8	open door policy--ask each other for help	no fear of asking what can i do better or how can i do this
8/30/23	Section 8	customer service	responsive and compassionate with recipients. respond quickly. Someones emailing to find the right person to handle the issue
8/30/23	Section 8	flexibility	staff great at listening and
8/30/23	Section 8	being respectful	staff respectful with participants, but also can go to management with issues and feel safe doing so
8/30/23	Section 8	we get it done!!	get it done days before the deadline
8/30/23	Section 8	customer service	great at customer service overall
8/30/23	Section 8	collaboration	talk about problems and how to solve them,
8/30/23	Property Management	customer service	give great service
8/30/23	Property Management	care but fair	in industry, have to be compassionate but have to abide by rules and regulations
8/30/23	Property Management	evolving business practices	have changed immensely in a good way--technology, compliance, training, treatment of staff
8/30/23	Property Management	HASLO provides a lot of good training opportunities	strengthen skills on how to deal with complex situations
8/30/23	Property Management	stable and affordable housing to community	
8/30/23	Property Management	care about tenants. mental health matters.	
8/30/23	Property Management	keeps an open mind and an open door policy	
8/30/23	Property Management	listens to ideas whether employees or outside.	
8/30/23	Property Management	open door to overcome barriers	
8/30/23	Property Management	teamwork and collaboration	
8/30/23	Property Management	compassion	
8/30/23	Property Management	team support and allows employees to show strengths	
8/30/23	Support Services	Teamwork between departments	we help each other a lot. call with questions all the time
8/30/23	Support Services	open to new ideas	
8/30/23	Support Services	help people	see it amongst not just SS, but also PM, M. Has observed it a lot at the Anderson. You are here/there because you like to help people. Everyone's heart is to help people.
8/30/23	Support Services	Staff events	get all departments together to celebrate birthdays, dept.
8/30/23	Support Services	Schedule and flexibility	every other Friday off. flexible to meet personal needs that come up. i.e. working from home
8/30/23	Support Services	teamwork	SS communicates well, close. give each other ideas and support
8/30/23	Support Services	team meetings	department is good at coordinating meetings with PM and others

What does HASLO as an organization do well?

Date	Team/Session	Comment	KCI additional notes
8/30/23	Support Services	Assesses clients' issues (and needs), and make good referrals	
8/30/23	Support Services	we have great people.	
8/30/23	Support Services	Commitment with residents	
8/30/23	Support Services	We are empathetic with clients	
8/30/23	Support Services	eviction is our last option--caring and compassion for tenants	
8/30/23	Support Services	open communication	from team to Elaine, to other departments.
8/30/23	Support Services	always willing to risk (and learn)	
8/30/23	Support Services	collaborative	
9/18/23	Maintenance	work as a team	
	Maintenance	care about people	
	Maintenance	do things right the first time	
	Maintenance	teamwork	
	Maintenance	communication between us as employees	more internal to the team
	Maintenance	morale boosters	company get togethers with ice cream, lunch, etc. good motivation and increases community
	Maintenance	support to all employees	
	Maintenance	treats employees like a family	
	Maintenance	works like a team	
	Maintenance	great team work	
	Maintenance	technical expertise	increasing technical people
	Maintenance	trust and respect from upper management	from ED it filters all the way down. It's very important and goes a long ways. creates happiness going to work
	Maintenance	able to be able to call upon others	i.e. knowledgeable on properties and where things are at
	Maintenance	support for each other	i.e. if you need a second pair of hands

What could HASLO improve on? What's holding the team back?

Date	Team/Session	Comment	KCI additional notes
8/17/23	Board	Maintenance could be better planned + add process	
8/17/23	Board	Department are sometime siloed - maybe think in terms of "us"/"ours" not "mine"	
8/17/23	Board	More monitoring of project sites under construction (e.g. loud music before start time, not meshing with/respecting neighborhoods, curse words, etc.)	
8/17/23	Board	Advocacy: Vocal support/connections to important issues / legislation (legality as HASLO/public agency?)	
8/17/23	Board	Continue the trajectory (i.e. new ED, new building, hear staff, engage Board/Commission)	
8/17/23	Board	Having meetings with residents - both high level about HASLO and site-specific about property	
8/17/23	Board	Better perception of clients and projects (e.g. the way people look at those who live in development, stereotypes that aren't true)	
8/17/23	Board	Refer to as communities or developments (NOT projects)	
8/17/23	Board	Full involvement and appreciation of all staff members	
8/17/23	Board	Possible training on DEI and trauma informed care for staff	
8/17/23	Board	I am not sure everyone understands what people go through in poverty - how a day is lived, need a reality check	
8/17/23	Board	Our community needs so many more units of affordable housing	
8/17/23	Board	Our community needs an understanding of the unhoused, chronically homeless, and appreciating of support of immigrants	
8/17/23	Finance & Construction	Collaboration between departments	
8/17/23	Finance & Construction	Burnout/long hours	
8/17/23	Finance & Construction	Transparency for decisions that are made	
8/17/23	Finance & Construction	Community outreach!	
8/17/23	Finance & Construction	Agency/partner collaboration	
8/17/23	Finance & Construction	Communication with other departments	
8/17/23	Finance & Construction	Break to refocus	Constantly task focused, so much to do, but need to step back and think strategically, refocus, etc.
8/17/23	Finance & Construction	More team building events	
8/17/23	Finance & Construction	Bring the candy dish back!	
8/17/23	Finance & Construction	Communication updates on big projects	If you're not leading the project, may not know where it's at, etc.
8/17/23	Finance & Construction	Interteam dynamics	Siloed at times, don't know other teammates
8/17/23	Finance & Construction	Negative vibes from burn out	
8/17/23	Finance & Construction	Consolidation of staff	They've come a long way, especially with the separation during COVID, then back at Laurel, now in new office. There's more chances to talk to teammates, etc.
8/17/23	Finance & Construction	Bringing all different departments together	
8/24/23	Executive & Res. Svc.	In future, being in a location where we are more centralized	Where more staff are together
8/24/23	Executive & Res. Svc.	Improved teamwork within entire agency/departments/teams AND encouraging all communication	Collaboration across departments
8/24/23	Executive & Res. Svc.	Communication between departments	
8/24/23	Executive & Res. Svc.	Holding all staff to the same standards	
8/24/23	Executive & Res. Svc.	Organizing and prioritizing	Prioritizing actions within role; sometimes overwhelmed with supporting others when you are busy already. (Vicki)

What could HASLO improve on? What's holding the team back?

Date	Team/Session	Comment	KCI additional notes
8/24/23	Executive & Res. Svc.	Belonging/DEI	How to break cliques and bring unity within staff as a whole
8/24/23	Executive & Res. Svc.	Communication and collaboration between departments	Remember you have a common goal and can work together nicely
8/24/23	Executive & Res. Svc.	Ongoing clarification of procedures, policies, roles, and responsibilities	Sometimes the changes don't get communicated with all people that it affects
8/24/23	Executive & Res. Svc.	Diversity	
8/24/23	Executive & Res. Svc.	Working on individual improvement to ensure progress and effectiveness; and encouragement of collaboration with others.	As team of 1. Improve on overall effectiveness of team (integrity) and to be a part of encouraging the better form of communication.
8/24/23	Executive & Res. Svc.	Developing staff	Otherwise people leave or feel stuck. Tensions and paradoxes of organization. Success
8/24/23	Executive & Res. Svc.	Hardest department to make feel part of HASLO is maintenance. Big lack of interdepartmental mingling.	
8/30/23	Section 8	retention of good, new employees	prevent a lot of turnover with staff
8/30/23	Section 8	procedural consistency	everyone needs to get on the same page over how things are done so its all consistent and done the same way
8/30/23	Section 8	how to give people time off without pressure	because of deadlines and __, theres a lot of pressure if you want/need to take time off. There's a LOT of prep you have to do ahead of time and then when you come back to work post-vacation, there's a tremendous workload
8/30/23	Section 8	create 4/10s	lots of pros and cons, but they work 9 hour days. once you're in groove, you get more done and it would be more beneficial overall to have that ability to do that if you chose to. "schedule flexibility"
8/30/23	Section 8	Scheduling communication	many times you are unsure knowing who's "in" who's "out" so sometimes workorders sit for weeks
8/30/23	Section 8	more training	different procedures, learning different things, etc.
8/30/23	Section 8	concise procedures amon	concise procedures for EVERYONE. hard to know which way is the right way, when there's not a "right way." more training for that
8/30/23	Section 8	keeping up with quick growth	it easily gets chaotic when there's a lot of quick growth. so, keeping up with that growth because it causes some chaos.
8/30/23	Section 8	flexible work house/schedule	helps balance intense workload
8/30/23	Section 8	support when people take time off	increases other people's workload
8/30/23	Section 8	consistency	because there's been different lengths of employment, even though the job gets done there has been hassle along the way trying to get there. so consistency in how to do things
8/30/23	Section 8	keeping in touch--we do in mini groups, but not as a whole. working remotely for most of us.	not as connected as they'd like to be
8/30/23	Section 8	Training -within departments; better understand what everyone does & their roles, etc.	training for intake team--important to understand housing __ more. important to have the understanding between departments so they can collectively work to approve tenants and give same response (?)
8/30/23	Section 8	life/work balance. don't want to take off due to being overwhelmed from time off. Irg. caseloads-management not having Irg caseloads with other work	because of the intense workload, you don't want to take time off. better work-life balance. Reduce stress by figuring out staffing
8/30/23	Section 8	policy standards	policy standards so you aren't crossing red lines for one person and not the other. maintain the same standards for everyone
8/30/23	Section 8	organizational gatherings	monthly whole-agency meetings where you get updates, work anniversaries, retirements, etc.
8/30/23	Section 8	training for all for consistency	
8/30/23	Section 8	quick growth- we don't know each other agency-wide and what's going on	
8/30/23	Property Management	consistent set up/technology at all offices (make accessible) to make it easier for people to work regardless of which office they work from	to make it easier for people to work regardless of which office they work from

What could HASLO improve on? What's holding the team back?

Date	Team/Session	Comment	KCI additional notes
8/30/23	Property Management	policy and procedures (for prop mngt.)	
8/30/23	Property Management	employee orientation program	have a great team, but hard to figure it out yourself. have to rely on the team to figure out issues.
8/30/23	Property Management	written policy and procedures	
8/30/23	Property Management	workload ratios	too much work, too little time. how do you handle that?
8/30/23	Property Management	more focused training for new staff	
8/30/23	Property Management	consistent process	
8/30/23	Property Management	department unity	
8/30/23	Property Management	policy and procedures	
8/30/23	Property Management	time management	
8/30/23	Property Management	fine tuning new procedures prior to implementation	decrease stress because you aren't trying to work out kinks as you also learn what to do
8/30/23	Property Management	not everything needs to be a meeting	more microsoft teams opportunities. sometimes with too many meetings you lose focus and start blurring information from all the meetings. idea: brainstorm team
8/30/23	Property Management	interdepartment team building	
8/30/23	Support Services	more joyful and inspirational work environment	seem to be building that
8/30/23	Support Services	knowledge and information passed down	and more effectively. ex: PHK open house. Didn't know about it at all.
8/30/23	Support Services	learn about other departments	interdepartmental understanding/knowledge/training
8/30/23	Support Services	learning boundaries with our clients. (not being taken adv. of)	to decrease getting taken advantage of so often
8/30/23	Support Services	Structure within our dept. (policies and procedures)	: structure within our dept.
8/30/23	Support Services	policies and procedures	
8/30/23	Support Services		need to know what to share, what not to share, when to share, means of sharing,
8/30/23	Support Services	software	for work being done in SS
8/30/23	Support Services	metrics on how to measure/track results	for both internal and external uses
8/30/23	Support Services	NO Yardi	not a fan of Yardi. don't like formatting for taking notes
8/30/23	Support Services	communication between departments	sometimes other departments don't think that others should know something
8/30/23	Support Services	policies and procedures	
8/30/23	Support Services	oxymoron: change and balance	love that it's exciting, different, flexible BUT you have to switch gears when something pops up. balancing between different tasks, clients/needs, etc. makes it difficult. constantly shifting priorities.
8/30/23	Support Services	change and balance	
8/30/23	Support Services	better communication between departments	a newsletter would be great
8/30/23	Support Services	keeping same caseload.	SS already know clients, establish relationships with clients, so changing people/case managers is in best interest of everyone
8/30/23	Support Services	less changes	creates conflict in jobs
8/30/23	Support Services	respecting SH as a unit	some miscommunication about tenant vs. case managers. you frequently are second guessed, being asked "what you are doing to inspire and incentivize them?" which is offensive/absurd. the core of social work is self-determination. it's all about clients making decisions for themselves. HASLO cannot make the decisions for them. you can provide programs and offer them, but you can keep offering. you cannot force them to make progress. the actuality of the job does not align with the questions of the industry (i.e. incentives)
8/30/23	Support Services	overwhelming for case manager to offer all services, de-escalate, refer	

What could HASLO improve on? What's holding the team back?

Date	Team/Session	Comment	KCI additional notes
8/30/23	Support Services	educate others about SH and the work of case managers	no one wants to evict with "housing first." cannot mandate treatment so be honest with what options are.
8/30/23	Support Services	more case managers	
8/30/23	Support Services	evenly balanced caseloads to prevent burnout	
8/30/23	Support Services	improve self-care for case managers	have had hard cases and it takes its toll. the job is very stressful and you try not to take things personally, but you do. you develop longterm relationships and then feel like you're doing a bad job when things go wrong or are out of your control.
8/30/23	Support Services	only so much each case manager can do... or burn out	
9/18/23	Maintenance	Standardizing items	
9/18/23	Maintenance	backup emergency supply	never had a big enough shop before,
9/18/23	Maintenance	finance/budget is tight for that type of thing	
9/18/23	Maintenance	Fire, flood, or blood definitions	
9/18/23	Maintenance	increasing ___ or having a house card for Home Depot or something	
9/18/23	Maintenance	Organizing inventory, HAD a centralized standardized inventory	Have standard things on your truck so you don't have to go to HD or something. Talking to Finance about it.
9/18/23	Maintenance	Need a newer shop for supplies	warehouse type thing
9/18/23	Maintenance	Stabilized assignments	you have properties that you do your work orders for and then you get switched with a bunch of work orders. You've been maintaining your properties and when you switch it's having to start over. Adds to work load and you have to reconfigure work orders to get it the way you want.
9/18/23	Maintenance	Standardize everything	
9/18/23	Maintenance	Be more proactive and preventative on things that you know would cause trouble in the long run	i.e. water leaks, high expense items, damage, etc
9/18/23	Maintenance	Site-specific documentation so that when you go to a new property then you know what to come	
9/18/23	Maintenance	When you change assignments that management knows what training or support needs to happen. Beings more cognitive of that piece of communication and support as we grow, add more teammates, etc.	
9/18/23	Maintenance	Lock system	There needs to be an easier way to go about not carrying a huge luggage of keys around. Especially for people who are newer to assignments/property changes, you don't know where the shut off valves are and stuff. Switching creates some trouble for mainenance.
9/18/23	Maintenance	Materials and resources	Not having to run to Miners or HD when something doesn't work because it's time consuming
9/18/23	Maintenance	Ferguson order with part numbers, etc. on the computer to order what you need. next day or 2-day delivery instead of running to physical shops.	
9/18/23	Maintenance	More ice cream parties	
9/18/23	Maintenance	Some properties have work that hasn't been done yet--> work on approving work orders that still haven't been done. Communication with PM to explain why they haven't been completed yet	
9/18/23	Maintenance	PM has access to HD supply. So communication with the Property Supervisors	
9/18/23	Maintenance	Mainenance guys having access to computers or books so they can order what thye need	
9/18/23	Maintenance	Delivery system with HD supply is terrible	
9/18/23	Maintenance	Ferguson is competitor with HD. They have other items for inventory too	

What could HASLO improve on? What's holding the team back?

Date	Team/Session	Comment	KCI additional notes
9/18/23	Maintenance	Reintroduction with Ferguson Rep so that she can hook it up with books or systems. Maybe every 6 months.	
9/18/23	Maintenance	Supplies come damaged when delivered through UPS, FedEx, etc. but HD Supply has great options when it works well. Sometimes HD Supply skips SLO, but works great through Santa Maria	
9/18/23	Maintenance	Standardize: Backup emergency supply stock	
9/18/23	Maintenance	Build a workshop	
9/18/23	Maintenance	Mnmg. know training/transition needed when switching properties	
9/18/23	Maintenance	More ice cream parties	
9/18/23	Maintenance	Several of the guys lack a good company credit line: increase credit line, add more suppliers	
9/18/23	Maintenance	Stabilize assignments	
9/18/23	Maintenance	Site-specific documentation	
9/18/23	Maintenance	Improve vendors. projects that still no approved OR	
9/18/23	Maintenance	Communicated more with property management	
9/18/23	Maintenance	streamline purchases; defined on-call emergency; house charge for HD	

What is something HASLO doesn't do, that you wish the organization did?

Date	Team/Session	Comment	KCI additional notes (related to note)
8/17/23	Finance & Construction	Agency-wide meetings	
8/17/23	Finance & Construction	Community events	
8/17/23	Finance & Construction	Recognize accomplishments within the agency	(new people, years of service, retirement, big project/task complete)
8/17/23	Finance & Construction	Staff/volunteer tenant events	(e.g. Anderson Hotel holiday caroling, food, etc.)
8/17/23	Finance & Construction	Intern program	
8/17/23	Finance & Construction	Softball	
8/17/23	Finance & Construction	Wellness community (yoga room)	(yoga room, stretching room, Jenna's HR emails - talk about joining wellness groups)
8/17/23	Finance & Construction	Internal newsletter faces to names	introduce new staff, put faces to names
8/17/23	Finance & Construction	Agency gatherings, potlucks, etc.	(e.g. baked potato bar, salad bar, chili cookoff)
8/17/23	Finance & Construction	Quiet day at office, no email, no phones	just organize, sort files, shred, etc.
8/17/23	Finance & Construction	Community garden	have gardens at some developments with open space, maybe a voluntary team building thing to grow whatever HASLO wants to contribute
8/17/23	Finance & Construction	Embrace new technology faster	
8/17/23	Finance & Construction	Volunteerism event	
8/17/23	Finance & Construction	Themes/event days	
8/17/23	Finance & Construction	Potlucks	
8/17/23	Finance & Construction	Dog days	
8/17/23	Finance & Construction	More agency-wide meetings to keep employees updated on other departments	Great within team but don't know other teams, know status on efforts, know what's happening
8/17/23	Finance & Construction	Extend opportunities, scholarships?	Scholarships, intern programs, etc.
8/17/23	Finance & Construction	Retreat (not business/conference-y)	Have fun together, get out of the office and do something fun
8/17/23	Finance & Construction	Staff meetings - share ideas and talk about challenges	Across departments, maybe something happened in finance that was hard that they could share with others or gather ideas from another team on how they handled a similar thing
8/17/23	Finance & Construction	Break out of our bad COVID social habits	In person, shake hands, meet people, gather
8/24/23	Executive & Res. Svc.	Cross Departmental Team(s)	Cross departmental teams across different issues, i.e. organizational health. Not just directors but different areas and levels of organization to create safety and comms and collaboration. One could be an events team
8/24/23	Executive & Res. Svc.	Recognition	Staff recognition.
8/24/23	Executive & Res. Svc.	Improve communication between departments-- intentional team building activities (w/o add to plate)	Improving communication between departments by doing intentional team building activities. BBQs are great and fun, but people still break into usual groups. Challenge to that might be that people might be distracted and stressed by adding to workload.
8/24/23	Executive & Res. Svc.	Acknowledge staff time and efforts	acknowledging good work of the staff. Everyone is overwhelmed and trying to juggle their tasks.
8/24/23	Executive & Res. Svc.	Professional Dev. pathways, opportunities for promotion	Professional development and pathways. You can see yourself in your job, but wonder about future and where you can grow and develop.
8/24/23	Executive & Res. Svc.	Response and timely response to residents/staff	Response and timely response to residents and staff
8/24/23	Executive & Res. Svc.	Review/consider indiv. roles/resp. Appreciation for effort/effectiveness. Import to feel appreciated, respected and equal level as all.	Reviewing and reconsidering roles and responsibilities. Recognizing people's work, roles, and resp. not to create division but inclusivity.
8/24/23	Executive & Res. Svc.	internal newsletter/videos	Internal newsletter or videos
8/24/23	Executive & Res. Svc.	DEIB program	DEIB program. Is a commissions goal already. Hard to know how to engage in it effectively. Set fears aside. Allow everyone to show up as their full selves and feel valued.

What is something HASLO doesn't do, that you wish the organization did?

Date	Team/Session	Comment	KCI additional notes (related to note)
8/24/23	Executive & Res. Svc.	Promote self-care	Promote self-care.
8/24/23	Executive & Res. Svc.	Make staff feel safe and heard	Make staff feel safe and heard
8/24/23	Executive & Res. Svc.	Team collabs. with different dept.	Team collaboration with different departments
8/24/23	Executive & Res. Svc.	Consistency (policies/procedures) [staff, residents, across the board]	Consistency with policy across the board as much as possible.
8/30/23	Section 8	Connection--know who does what, networking	who's in office, out of office, etc. if someone retires, then who is taking their place?
8/30/23	Section 8	Update website	it creates more questions and issues. doesn't benefit the org. information and user friendliness
8/30/23	Section 8	written formal procedures	need standardized, live document that is a procedural manual. Michelle wrote out a procedure list that made it so she could just check the list without asking a bunch of people. training, cheat sheets-->procedural manual instead
8/30/23	Section 8	streamline process between departments	streamlined process between different departments so if an inspector comes in then they know what's been done already, etc.
8/30/23	Section 8	update yard: remove old links, move links to correct locations, update current letters	updating current letters. somethings are not used anymore. have modified letters as they have been come across, but if someone could go through and do that consistently then everyone can maintain their workflow
8/30/23	Section 8	crosstraining	property management knowing more about ___ and how it relates to S8.
8/30/23	Section 8	FAQ person (training)	designated trainer who knows all procedures, policies, etc. who is IN the office so that someone is prepared as they step into the job. would help with retention
8/30/23	Section 8	more department communication	people are retiring, leaving, etc. so it would be helpful to know ahead of time
8/30/23	Section 8	collaboration events, AKA: FUN	when they communicate with PM, they don't always get a helpful response. SO foster feelings of helpfulness and connection through FUN
8/30/23	Section 8	landlord briefings/orientation. website--> video: notices/fair housing	landlord briefings like how they brief new participants beucase they will get calls for understanding fair housing, etc.
8/30/23	Section 8	update website	more user friendly
8/30/23	Section 8	employee newsletter with picture/contact	who's going to take someone's place when they retire. photos of new employees and their positions
8/30/23	Section 8	team building events that are fun	fun for the whole company so that everyone can get to know everyone
8/30/23	Section 8	transparency	with voucher freeze, if staff had known what was happening sooner then they would be more prepared to absorb and deal with the public backlash. it was really hard to digest, let alone explain. it would have allowed for more compassion and dealing with negativity overall
8/30/23	Section 8	employee of the month	
8/30/23	Section 8	recognizing longevity	employees that have been iwth an organization for many years are a valuable resource to the org. doesn't need to be a big gift or fancy or money, but just increasing appreciation and recognition.
8/30/23	Section 8	badges for employees	badge with name, photo, etc.
8/30/23	Section 8	in-person meetings	weekly zoom meetings are fine, but in-person meetings create an easier, safe space for everyone to participate and share
8/30/23	Section 8	written Q & A for landlords and for tenants	many landlords don't know anything about the properties they are managing. tenants get briefing and video, but it never sticks. it would be helpful for people to have access to and can be referred to
8/30/23	Section 8	in and out board	knowing someone's status
8/30/23	Property Management	management meetings with hands-on experience, in-person training away from HASLO offices	whole company comes together in offsite location. do management training. get to bond
8/30/23	Property Management	crossdepartment unification. we are 1 team with 1 goal!	can be big divide
8/30/23	Property Management	more one on one trainings. not everyone learns well via zoom	

What is something HASLO doesn't do, that you wish the organization did?

Date	Team/Session	Comment	KCI additional notes (related to note)
8/30/23	Property Management	communication between departments/coworkers	instead of reaching out to supervisor you can reach out to coworker. can reach out to another department to ask Q.
8/30/23	Property Management	employee appreciation- every dept. criteria + all HASLO	every department comes up with a program on how to select different employees from different departments. have whole agency events to celebrate that
8/30/23	Property Management	employee training program to learn about other departments	both internal within teams to understand properties AND crosstraining/departments
8/30/23	Property Management	tenant education program - aff. tax credit, etc. specific programs	a lot of tenants get confused on types of programs that HASLO offers. allow tenants to understand the types of programs. Have Housing 101 but mainly for case managers--> more for tenants. dealing with noise, neighbors,
8/30/23	Property Management	Housing 101 for residents + other education	
8/30/23	Property Management	New staff 90 day training with test to certify	
8/30/23	Property Management	Centralized lease violation process	centralized person that tenants call with a complaint. someone in the middle that gets to know both sides.
8/30/23	Property Management	efficient property handoff	
8/30/23	Property Management	workload	workload appears overwhelming. have a lot of needy tenants with disabilities, etc. and it takes away from your day and takes you out of your tasks. takes away from your ability to engage in your own work. role clarity and boundary setting between departments. personal management of tenant--very time consuming. tenants tend to have trust issues so when they get handed off to someone else, it gets tricky. because tenants know you (PM) from beginning, they don't want to get handed off to someone. Personal introductions to other
8/30/23	Property Management	Partnering Agency Fair Housing Training	
8/30/23	Property Management	trauma-informed care and thoughtful handoff	clients have history of trauma. use that knowledge to be able to navigate the handoff gently and
8/30/23	Property Management	Boundaries (PM vs. SHM vs. S8 AND PM & tenant)	
8/30/23	Property Management	communication between departments	subsidy is tied to a lot of properties. communication can sometimes muddy the waters. PM takes a bulk of the workload when that isn't necessarily needed. streamline to know who how to balance between roles.
8/30/23	Property Management	Birthday off/acceptance of self-care. opportunities, training, initiation.	taking your birthday off, staff initiatives, etc. offer service of self care to allow for PM to be able to continue in role and not take it on in such a personal way (i.e. dreams)
8/30/23	Property Management	Upper management check with PM before new projects, collaboratives	assessing whether we can manage a property before taking on a new property/project. help to know ahead of time (i.e. training or communication)
8/30/23	Property Management	collaborative meetings: meet with PM to discuss needs of clients in units	building dept. meets with PM to know what's going on. ex: no closets. this is a barrier and creates solvable problems that fall in the lap of PM
8/30/23	Property Management	collaborative meetings talk about what's working, what's not	
8/30/23	Property Management	compliance requirements training or communications before implement	had to get creative to help clients meet requirements AFTER they had already moved in
8/30/23	Property Management	access to regulatory agreement for property and webpage	how do we do a better job at having all documents accessible and easy to find? one page summary. links. syllabus to navigate the G-drive better. overview of F-drive.
8/30/23	Property Management	E-file transition. Sharepoint? HASLO investment. moving towards digital files--organization	"would be great to go to Hidden Creek and everything was there." as we move toward SharePoint, it would be great to organize files and make it streamlined. Takes ownership of how to make it happen/who is going to take on that duty/work.
8/30/23	Property Management	New doct + online solutions vs. hard copy. how best to organize and share and handoff across HASLO or Binder	
8/30/23	Property Management	Syllabus or G-Drive overview or change	
8/30/23	Support Services	bonding events for department	maybe once every couple months. idea: escape rooms
8/30/23	Support Services	WFH 1 day every other week	too many interruptions. can plan things to take care of from home (ex: phone call for budget with client)

What is something HASLO doesn't do, that you wish the organization did?

Date	Team/Session	Comment	KCI additional notes (related to note)
8/30/23	Support Services	more support for our program (\$)	don't have the budget in SH. have to wait for approval for things for clients (like groceries, bus passes, etc.) to make appointments work
8/30/23	Support Services	receive more pos. feedback	to receive more positive feedback for hard work would be great.
8/30/23	Support Services		in order to create more awareness of job, responsibilities, etc. have a PM shadow a CM for a day to see what they do
8/30/23	Support Services	outings for team building and appreciation	within department
8/30/23	Support Services	SH office where you can meet clients	programatically appropriate: how do we design a space for SH that fits.
8/30/23	Support Services	formalized self-care program	maybe at the agency-level
8/30/23	Support Services	this process itself is helpful	
8/30/23	Support Services	start fundraiser for SH Program	need money for some of the tenants. some sort of budget building to meet client needs.
8/30/23	Support Services	field trip to other org'n/cities. within departments.	go with someone else to see how they run things for SH and maintenance and PM in another agency
8/30/23	Support Services	issue of Board being averse to eviction	feels like there is a wall when it comes to evictions. will let anyone in, but won't let anyone out. may want to consider a transition of thought process. "right now" you don't fit into the community culture, but that does not limit you in the future or mean you won't meet the standards in the future. Given time, evidence, and effort that there is a soft landing (i.e. case management as this person leaves) and a heads up that this is the ultimate outcome if certain behaviors and things do not change. Often get the feeling that Board is averse to eviction because of insurance, perception, etc. But it makes it hard for CM to deliver a message when there are empty threats/no hard lines for when someone does not meet necessary standards. Change is hard for people and sometimes you have to hit rock bottom before that will happen.
9/18/23	Maintenance	Update locks	Use control keys. It's just money and time.
9/18/23	Maintenance	Truck wash.	
9/18/23	Maintenance	Computers for the shop.	
9/18/23	Maintenance	Improve skills training	Skills training to improve skillset. like getting better at diagnosing or troubleshooting issues that are happening (i.e. HVAC, Refridgeration). Can look into HD Supply for their FREE trainings for electrical and stuff. Want a professional to come and train so that you do it well the first time.
9/18/23	Maintenance	Improve approval process.	To find out what projects are approved and get them done. Get bids, and get our own pieces/workorders done
9/18/23	Maintenance	Computer access	Having laptops, tablets, or seomtehing to go to for what they need (even trainings)
9/18/23	Maintenance	Equipment like sewer _____	
9/18/23	Maintenance	Create a standard for the new complexes on materials	Have something that works for maintenance. The materials used for complexes sometimes actually cause problems. Like specialized products that are site-specific you cannot just fix with a standard product
9/18/23	Maintenance	Participate in the design of new complexes	
9/18/23	Maintenance	Property maintenance storage are small or non-existent	**thank you for new place where they park trucks.
9/18/23	Maintenance	Better communication on workorders	Maybe information on tenants and residents. Have a phone number but they never respond. May have to do with tenants who do not want you to come into the unit/see it.
9/18/23	Maintenance	Cleaning the vehicle	Used county facilities or city facilities in Fresno. Was free because it was pre-existing means to wash big trucks.

Summary of HASLO's 2023 SWOT Analysis: Top 5 Priority SWOT Areas

*SWOT session conducted on 10/4/2023
Participants included HASLO's Leadership Team*

“SWOT” analysis refers to the process of documenting HASLO’s current internal Strengths and internal Weaknesses as it relates to the organization’s capacity to complete its mission, staff’s ability to do their jobs well, and overall team dynamics. The SWOT analysis also refers to the process of identifying externalities that might pose as either an Opportunity or a Threat to HASLO’s ability to complete its mission, support its staff and function well.

During the session brainstorming, the HASLO Leadership Team considered input from the 2023 All Staff Survey results and input gathered from staff during each pre-session meeting. While the participants developed longer lists for each category below, the following table includes top five priorities for each category as identified by HASLO’s Leadership Team during the session.

This analysis serves as a foundation for strategic planning—as HASLO considers its future vision as an organization/employer and what will be needed to accomplish that.

<p><u>Top Strengths</u></p> <ol style="list-style-type: none"> 1. Forward-thinking/innovative; Leadership; Vision 2. Compassion; Trust/care for staff 3. Open door policy; Openness; Accessibility 4. Making investments in staff/other areas; Team support 5. Dedicated staff; Committed to our purpose; Meaning and compassion 	<p><u>Top Weaknesses</u></p> <ol style="list-style-type: none"> 1. Lack of work-life balance; Burnout; Overwhelm; Inability to take time off; Lack of workload/caseload balance 2. Limited collaboration; Limited inter-department collaboration and dynamics 3. Lack of communication across organization and team building; trickle down communications 4. Need policies and procedures 5. Turnover/retention
<p><u>Top Opportunities</u></p> <ol style="list-style-type: none"> 1. Market rate housing for employees; Workforce housing 2. Partnerships (nonprofits, governments); Strengthen outside collaborations with vendors (client support) 3. Grant writer; Pursue philanthropic funding 4. Internships, Federal work study programs and/or next generation staffing; Cuesta, Cal Poly; Eckerd for unemployed clients 5. Cross-collaboration with partner agencies for training opportunities 	<p><u>Top Threats</u></p> <ol style="list-style-type: none"> 1. Change overload 2. Inflation; cost of living 3. Compliance changes; HUD regulations 4. Government shutdowns; Federal/State/County funding 5. Expectations of HASLO; Community perceptions and support

HASLO Visioning Session Summary

October 26, 2023

On Thursday October 26, 2023, Koble Collaborative facilitated an all day Visioning Session with HASLO's leadership team and Board of Directors. Participants totaled 17, including one person attending the session via Zoom. During this interactive session, the team used information from the HASLO All-Staff Survey results, the seven Pre-Session Team Meeting notes and takeaways, and the SWOT Session summary to synthesize a Vision of Greatness for the agency over the next five years, obstacles that might hinder efforts in achieving that vision, and actionable steps to take towards that vision (which may lean on agency strengths and combat weaknesses/obstacles).

The following briefly summarizes the session as well as key outcomes. The related tables provide detailed notes shared aloud by teams regarding each exercise.

- I. **Vision of Greatness:** *It's 2028 and HASLO has just been named the best employer in the State of California. What specific aspects of your organization will make you the best employer - staff opportunities, team dynamics, employee programs, organizational culture, etc.?*
 - A. Process we took:
 1. Brainstorming in small groups
 2. Categorized ideas (**Table 1A**)
 3. Grouped and themed ideas (**Table 1B**)
 - B. Final outcomes (description must make sense to employees):
 1. Foundation (backbone)
 2. Internal glue to bring team (back) together
 3. Protect mission externally
 4. Playbook and tools to meet the future
 5. Employee wellness
 6. Rewards and celebration
 - C. One final thought was shared for how to tell a cohesive story about the six themes of the Vision of Greatness. See **Table 1B** for concept details.
- II. **Obstacles to Vision:** *What is currently blocking or could block the organization from attaining this vision?*
 - A. Process we took:
 1. Brainstorming in small groups
 2. Categorized ideas (**Table 2A**)
 3. Grouped and themed ideas (**Table 2B**)
 - B. Final outcomes:
 1. Financial constraints
 2. Existing and shifting culture + lack of willingness to change

3. Separate and disconnected staff + time impacts of multiple sites
4. Outside influences
5. Employee demotivation

III. Strategies and Actions to Achieve Vision: *What innovative or substantial actions, employee programs, or improvements can be made to overcome obstacles and achieve vision of success?*

A. Process we took:

1. Brainstorming in small groups
2. Categorized ideas (**Table 3A**)
3. Grouped and themed ideas (**Table 3B**)

B. Final outcomes:

1. Employee Benefits
2. Communication of Unknown, Good Vibes, Leadership and Culture
3. Skill and Team Building and Recognition
4. Support/Structure
5. Workforce Housing (left unthemed)

IV. Closing Thoughts

- A. Highlighted the importance of spending the full day working collaboratively and mixing up teams to strengthen internal relationships and better understand one another.
- B. Appreciate the dedication of each participant and HASLO as an organization for the resources, time, and energy they are spending throughout this entire process.
- C. Today, the Board and the Leadership and Management teams set a vision for where, as an organization and an employer, they hope to see HASLO five years from now.
- D. The two final sessions scheduled for November 6, 2023 and November 13, 2023 will focus on prioritizing actions and defining implementation paths, especially in 2024.

Table 1A. Vision of Greatness (categorized)

Essential <ol style="list-style-type: none">1. Benefits and Pay2. Clearly defining boundaries with clients, govt, and partner orgs3. Focus on training4. Sensitive Candidness5. Creative risk taking	Moonshot <ol style="list-style-type: none">1. Employee Childcare2. Pro-family policies (daycare, part time, flexible, etc.)3. Fundraiser staff person4. Support the "whole" employee
Low Hanging Fruit/Easy <ol style="list-style-type: none">1. Recognition and motivation2. Rewards and recognition program (socials, goals)3. Policies and procedures4. Celebrate individual and team achievements	Other <ol style="list-style-type: none">1. Debrief/counseling structure for staff to process hard parts of the job (evictions, etc.)2. Proactive and not reactive3. Progressive and humble culture within org4. Employee sponsored self-care incentive5. Extensive and documented Training Programs for new staff6. Communication between departments7. Keeping up with technology8. Field trips!9. Organizational collaboration and cooperation10. Accessible, knowledgeable, and supportive management/leaders

Table 1B. Vision of Greatness (themes)

Themes	Related Ideas
<p>Foundation (backbone)</p> <ul style="list-style-type: none"> • <i>Idea for external storytelling: Support Mission</i> 	<ul style="list-style-type: none"> • Organizational collaboration and cooperation • Accessible, knowledgeable, and supportive management/leaders • Fundraiser staff person • Communication between departments • Creative/risk taking • Benefits + Pay
<p>Internal glue to bring team (back) together</p> <ul style="list-style-type: none"> • <i>Idea for external storytelling: Mission integrity</i> 	<ul style="list-style-type: none"> • Progressive and humble culture within org • Sensitive candidness
<p>Protect mission externally</p> <ul style="list-style-type: none"> • <i>Idea for external storytelling: Protect mission</i> 	<ul style="list-style-type: none"> • Clearly defined boundaries with clients, govts, and partner orgs • Proactive, not reactionary
<p>Playbook and tools to meet the future</p> <ul style="list-style-type: none"> • <i>Idea for external storytelling: Sustain mission</i> 	<ul style="list-style-type: none"> • Keeping up with technology • Improve policies and procedures • Extensive + documented Training Programs for new staff • Focus on training
<p>Employee wellness</p> <ul style="list-style-type: none"> • <i>Idea for external storytelling: Nurture mission</i> 	<ul style="list-style-type: none"> • Employee childcare • Pro-family policies (daycare, part time, flexible) • Employee sponsored self-care incentive • Support the “whole” employee • Debrief/counseling for staff to process hard parts of the job (evictions, etc) • Employee Counselor
<p>Rewards and celebration</p> <ul style="list-style-type: none"> • <i>Idea for external storytelling: Achieve Mission</i> 	<ul style="list-style-type: none"> • Field trips • Recognition and motivation • Rewards + recognition program (socials, goals) • Celebrate individual and team achievements

Table 2A. Obstacles to Vision (categorized)

<p>Most Significant</p> <ol style="list-style-type: none">1. Past tensions between leaders and staff2. Constant change (forced on us-bureaucratic)3. Continued state, federal, local, funding sources4. Cost/budget5. Budget/financial obligations for salaries or new positions6. Financial strength of organization7. Not fostering healthy professional relationships8. Time<ol style="list-style-type: none">a. To create policyb. To create a social schedule9. Blocking external distractions10. Leadership has to model work-life example	<p>Easiest to Solve</p> <ol style="list-style-type: none">1. Staff burnout2. Not feeling valued3. Low engagement4. Not feeling empowered to take risks, fear of failing5. Not enough buy in to vision/purpose6. Clear opportunities for growth (Career path)7. Education, communication on mission (in order to protect mission)
<p>Most Challenging to Solve</p> <ol style="list-style-type: none">1. Inflationary impacts on employment and retention2. Employee retention-employee housing3. Limited (fixed) mindset4. Assumptions and attitudes (about procedures, roles, methods)5. Being set in your ways, not willing to progress, not accept need to change	<p>Other</p> <ol style="list-style-type: none">1. Disjointed office spaces2. Differences

Table 2B. Obstacles to Vision

Themes	Related Obstacles
Financial Constraints	<ul style="list-style-type: none">● Financial strength of organization● Cost/budget● Budget/financial obligations for wellness or new positions● Continued state, federal, local funding sources● Blocking external distractions
Existing and shifting culture + Lack of willingness to change	<ul style="list-style-type: none">● Past tensions between leaders and staff● Not enough buy in to vision/purpose● Low engagement● Not fostering healthy professional relationships● Being set in your way; not willing to progress; not accept need to change● Differences● Assumptions and Attitudes (about procedures, roles, methods)● Limited (fixed) mindset
Separate and Disconnected Staff + Time Impacts of Multiple Sites	<ul style="list-style-type: none">● Disjointed office spaces<ul style="list-style-type: none">○ New office won't bring everyone together because of HASLO's model/structure.○ Satellite offices always feel like they are alone and tend to create their own policies and procedures○ Big challenge with further office is TIME. It's a lot of time to drive out to the satellite offices to make in person contact.
Outside influences	<ul style="list-style-type: none">● Time<ul style="list-style-type: none">○ To create policy○ To create a social schedule● Constant change (regulatory)● Don't see path to/opportunities for growth (career path)● Inflationary impacts on employment and retention

Table 2B. Obstacles to Vision

Themes	Related Obstacles
Both Outside influences + Employee demotivation	<ul style="list-style-type: none">● Employee retention–employee housing<ul style="list-style-type: none">○ In some cases, an org. can compensate for financial shortcomings with good culture● Housing incentive● Rent or buy-lack of affordability
Employee demotivation- could be personal or professional	<ul style="list-style-type: none">● Not feeling valued● Not feeling empowered to take risks; fear of failing● Leadership has to model work-life example● Staff burn-out● Education/communication (in order to protect the mission)<ul style="list-style-type: none">○ Goes with training. Getting team to understand mission of HASLO.● Employee relating to mission

Table 3A. Strategies and Actions (categorized)

<p>Most Exciting</p> <ol style="list-style-type: none"> 1. 4-10 Consideration 2. Sharing personality testing results 3. Leaders need to influence 4. Annual 5% COLA 5. Annual Paid Sabbatical 6. T-shirts (polos) 	<p>Most Impactful or Significant</p> <ol style="list-style-type: none"> 1. Work agreements + soft skill training 2. Soft skills training 3. Enhanced wellness program 4. Team building 5. Team building 6. EAP (Employee Assistance Program) 7. Frequent and consistent communication 8. Employee Show and Tell (cross training) 9. Continue to allow flexible work schedules 10. Assistance in overcoming the fear of change 11. On the change bus or not
<p>Easiest to Do</p> <ol style="list-style-type: none"> 1. Quarterly All-Staff Meetings 2. All Staff Meetings with recognition 3. Training Center 4. Budget review for priority setting and implementation 5. Employee committees 6. Schedule working from home 	<p>Other</p> <ol style="list-style-type: none"> 1. Process review streamline 2. Time block to develop policies and procedures 3. Improve cross training 4. Continuing education (K courses?) 5. Management Agreement Mediation (if management staff is having difficulty talking to each other. Sometimes you need a third person to approach conflict with another individual) 6. Interdepartmental training 7. Grant writer/Fund development 8. Substitute Staffer/Floater/In all roles (so that people can take vacations and their work will be covered) 9. Workforce Housing

Table 3B. Strategies and Actions to Vision (themes)

Themes	Related Ideas
Employee Benefits	<ul style="list-style-type: none"> ● EAP (Employee Assistance Program) ● Enhanced Wellness Program ● Schedule working from home ● Continue to allow flexible work schedules ● 4-10 consideration ● Annual paid sabbatical ● Annual 5% COLA ● T-Shirts (polos)
Communication of Unknown, Good Vibes, Leadership and Culture	<ul style="list-style-type: none"> ● Sharing personality testing results ● Leaders need to influence ● On the change bus or not ● Assistance in overcoming the fear of change ● Frequent + consistent communication ● Management Agreement Mediation
Skill and Team Building and Recognition	<ul style="list-style-type: none"> ● Training center ● Interdepartmental training ● Fun fund ● Improve cross training ● Soft skills training ● Continuing education ● Employee Show and Tell (cross training) ● Team building ● Work agreement (soft skill training)
Support/Structure	<ul style="list-style-type: none"> ● All staff meetings with recognition ● Quarterly or monthly all-staff meetings in-person ● Process review streamline ● Time block to develop policies + procedures ● Budget review for priority setting + implementation ● Substitution staffer/in all roles <ul style="list-style-type: none"> ○ Floater within each department ● Grant writer/fund development ● Employee committees
Workforce housing	<ul style="list-style-type: none"> ● Workforce housing

HASLO 2024 Implementation

Purpose of spreadsheet: This spreadsheet documents HASLO Leadership's plan for implementation of priority actions for 2024. These actions are aimed at improving team dynamics, organizational effectiveness, and the culture of HASLO. Below is a quick snapshot of each Work Group's assigned Actions, final deliverables and hyperlinks to the related spreadsheet tab for more details.

This tab is just a reference sheet so you can easily click the hyperlink on the far right to navigate to your Work Group's pages.

TABLE OF CONTENTS & LINKS TO EACH WORK GROUP'S ACTIONS

Work Group	Action Number	Action Statement	Final Deliverable	Link to Spreadsheet
Communications	1	By June 2024 and ongoing, commit to and create consistent, frequent and transparent communication across teams and leadership-to-staff, such as education on HASLO mission, organization, roles, decision process and outcomes, acknowledgments etc.	All staff feel informed	COMMS - Action #1
Communications	3	By March 2024, initiate quarterly all-staff, in-person meetings (include recognition of staff retirements, progress, new employees, promotions, etc.).	Host an in-person quarterly meeting	COMMS - Action #3
Communications	12	By DATE TBD BY TEAM (by on before December 2024), define a rewards and recognition program (socials, goals, etc.).	Rewards and Recognition Program developed and scheduled to begin	COMMS - Action #12
Communications	13	By DATE TBD BY TEAM (by or before December 2024), conduct work/communication style profile testing and share with teammates to enhance interactions among teammates.	Learn co-workers communication styles & preference	COMMS - Action #13
Staff Support Tools	2	By January 2024, develop, finalize, and implement a Work Agreement (with accompanying soft skill training).	Work Agreement understood and signed by all staff. Added to employee files.	SST - Action #2
Staff Support Tools	6	By June 2024, evaluate paths for creating employee counseling/debrief for staff to process difficult situations.	Need to add	SST - Action #6
Staff Support Tools (Workforce Housing)	8	By June 2024, explore workforce housing and potential partnerships opportunities including, but not limited to, employee housing incentives.	Tentative workforce housing and employee housing incentive program to propose.	SST/WH - Action #8
Staff Support Tools	10	By July 2024, evaluate the current wellness program and consider new initiatives, like an employer sponsored self-care incentive.	Need to add	SST - Action #10
Staff Support Tools	14	By December 2024, develop internal conflict resolution processes.	Conflict resolution policy/process in place.	SST - Action #14
Innovation	7	By March 2024, identify one process to evaluate for streamlining. By June 2024, consider different models to evaluate the process.	Finding a process to make life easier and more effective and productive	INNO. - Action #7
Innovation	15	By November 2024, develop priority policies and procedures (including, but not limited to, DEI, hiring, promotions, and others).	Finding a way to make difficult things easier for each department. Increase productivity and quality.	INNO. - Action #15
Funding	4	By June 2024 and ongoing, review the budget for priority setting and implementation.	Full analysis has been completed and communicated to staff	FUND - Action #4
Funding	5	By June 2024, evaluate the need and options for nonprofit grant writer/fund development to support future needs of the organization.	Need to add	FUND - Action #5
Funding	9	By August 2024, develop a process to annually consider the need for cost of living adjustment (COLA) based on market studies, etc.	Need to add	FUND - Action #9
Training (general focus)	11	By December 2024, identify programs to meet general training, interdepartmental/cross training, and continuing education needs, including topics: DEI, team building, soft skills, communications, change management, and more.	Need to add	TRA - Action #11
Training (DEI focus)	11	By June 2024, identify and develop a DEI training program.	Developed DEI training program.	TRA - Action #11 (DEI)
Training (Crosstraining focus)	11	By June 2024, identify programs to meet interdepartmental/cross training needs.	Developed Crosstraining program.	TRA - Action #11 (Cross Training)
Training (General Training Needs focus)	11	By December 2024, identify programs needed to meet general training needs.	Prioritized training needs to inform training programs.	TRA - Action #11 (Training Needs)
Training (Continuing Education focus)	11	By December 2024, identify programs needed to meet continuing education needs.	Need to add	TRA - Action #11 (Continuing Ed.)
Training (Leadership/Supervisory/Soft Skills training focus)	11	By December 2024, identify programs needed to meet leadership/development training needs.	Need to add	TRA - Action #11 (Employee Development)

HASLO Year 1 Implementation Session

Leadership Thoughts on Organizational Plan Success Needs

At the November 13, 2023 implementation session, the leadership team voiced their thoughts on what each group would need from the organization and from each other in order to effectively implement priority actions identified for 2024. This proactive think-tank anticipated future needs and challenges, and also developed potential solutions for each, building ideas for communication and support.

Individual Work Group (WG) Needs and Basic Expectations:

- Each WG to select lead/point of contact for monthly inter work group meetings
- Monthly meetings, or more frequent as needed
- Rotating notetaker for each group → to email notes and updates from each meeting, accomplishments, etc. to the WG and the leadership team
- Continue working on and maintain each of your WG's Action sheets on the [2024 Implementation Work Group Action Steps](#)
- Create an initial rough cost proposals of each WG's actions, ideas and requests
- Always have money for some things, and with the Budget Review process priorities can be set and future year's actions can be planned out.
- Work through TEAMS instead of Zoom to enable chat
 - Need to set up and train the whole organization
- Be accepting that you have to do the work to know what's worthwhile, what items we have the dollars for, what will actually work.

Inter- Work Group Communication about Progress:

- Scott to update entire organization on the outcomes of these meetings at holiday party
- Email
- Monthly meetings with all WGs present (and/or represented by WG point of contact)
 - Who: All members of Work Groups
 - When: About 30 mins.

- Where: Virtual or in-person meetings
 - Venue ideas: Winery, People's Self-Help Housing, parks, etc.
- What: Progress update by each WG
 - Create simple shared template for WG monthly progress update
 - Type of information to share:
 - Goals and action steps with timelines
 - Problems, pushback, challenges
 - Status update. If a certain WG (or those supporting a WG's efforts) is falling behind then the rest know and can help.
 - Successes and celebrations
 - Suggestions on how to coordinate, communicate, and implement with staff and/or requests
 - Checking pulse on everything. *How do we feel? How is this going?*
 - What to prioritize?
 - Honesty
 - Be honest with Scott and each other
 - Pace, level of push by Scott, etc. (things that he can't guess about)

How HASLO can help and support Work Groups:

- Scott to update entire organization on the outcomes of HASLO's Team Engagement and Organizational Strategy survey and sessions (i.e. at holiday party, and other updates along the way)
- Time to work towards and accomplish WG goals.
 - Consider time blocking
 - Executive team to set dates and/or day
 - Ex: "No Meeting Friday or Monday" idea
- Temper expectations. Can't solve everything in 6 months.
- How things are communicated is key. Building off success that's already in place. Improvements you want will take a bit of work.
 - Communicating what's in it for "me" as much as it is for HASLO

- No penalty if things slow down elsewhere in workload due to added work from WG goals. Need to figure out what to prioritize (and de-prioritize) in workload - Check in with your supervisor and/or Executive Team, as needed, to prioritize and balance your workload.
 - Maintenance has things that they cannot get away from/has “must” things, so maintain awareness and plan around that as possible.
- Don't expect perfection from WG. This is the starting point, so meet one another with grace.
- Plan ahead and make meetings consistent (e.g. set date)
 - Goal to help everyone stay engaged and WG's commitment
 - Consistency of involvement throughout the whole process
- Commitment from everyone in WG to show up and be present. Be involved.
 - Need involvement from staff and need to get them excited about these priority actions too.
 - Address worries about how staff feels about all these things.
 - Avoid losing momentum and letting WG and priorities to go by the wayside
- Actions need money
 - Funding WG to provide budget review
 - Each WG to send estimated cost of each Action's proposed effort(s)
 - Build plans and see what might need to be paused and what can go through.
 - Consider what's realistic in 2024 budget? Be transparent.
 - E.g. If only time is needed, that's easier to fit in existing budget. However, if funding needed for venue, etc. need to consider how to fund it and when/whether it is feasible.
 - In most years you can do *some* things regardless of what Congress does. Come up with ideas, look at the list. Can you do at least 2? Great! Then everything else gets put aside until next year.
- Keep everyone's focus: This is positive and outcomes are intended to support HASLO, each team and staff overall.
 - If negative, consider how to handle?
 - Provide training to staff on change management
- Honesty and transparency