

**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.**

<b>12:00 PM</b>	<b>REGULAR MEETING</b>	<b>1150 Laurel Lane, Suite 180 Office Hours Conference Room</b>
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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.

**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 ANNUAL MEETING OF JANUARY 18, 2024**  
Approve the Minutes of the Annual Board of Commissioners Meeting of January 18, 2024
- 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**

**DISCUSSION ITEMS:**

**SUMMARY OF UPCOMING ADMINISTRATIVE PLAN CHANGES**

See attached staff report.

**CLOSED SESSIONS**

**Closed session, pursuant to section 54957**

**PUBLIC EMPLOYEE PERFORMANCE EVALUATION**

Title: Executive Director

**PUBLIC EMPLOYEE PERSONNEL DISCUSSION**

**REMINDER FOR COMMISSIONERS:**

2023 Annual Statement of Economic Interest, Form 700, is due 04/02/2024.

**ADJOURNMENT**

The next Regular Meeting will be held on March 21, 2024, at 12:00 p.m.

**REQUIREMENTS OF THE BROWN ACT HAVE BEEN SATISFIED AS THIS NOTICE WAS POSTED AT 11:45 A.M. ON FEBRUARY 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.

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

## **MINUTES**

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

**January 18, 2024**

#### **CALL TO ORDER**

The Annual Meeting of the Housing Authority of the City of San Luis Obispo was called to order on Thursday, January 18, 2024, at 12:01 p.m. at 1150 Laurel Lane, Suite 180, San Luis Obispo, by Chair Ashlea Boyer.

#### **ROLL CALL**

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

**ABSENT:** None

**STAFF:** Scott Collins, Sandra Bourbon, Michael Burke, Michelle Pedigo, Clover Robinson, and Vicky Culman

#### **PUBLIC COMMENT:**

None.

#### **EXECUTIVE DIRECTOR'S REPORT:**

Scott Collins, Executive Director, reported that Morro Bay, Toscano, Shell Beach, Anderson, and the office are due to open this year. PG&E is set to complete the connection of the Morro Bay switch gear on Monday; initially they estimated connection in March or April. Toscano should have the process completed by the end of January. Shell Beach should be completed by May and Anderson by August. We appreciate the patience of the Anderson neighbors. The HASLO office should be completed by early 2025. Cleaver and Clark has closed and construction will start next month. Maxine Lewis will close by Friday and Bridge Street will close early February. Maxine Lewis received funding from by the City and the County allowing the project to close.

Macadero had upgrades to its roof, siding, and painting. Carmel is in the process of decarbonization work. Team Engagement strategy is being implemented by staff.

TCAC deadline has moved to February to avoid closings during the end-of-year holiday season. Arroyo Terrace and Monterey will be submitted at the same time.

Michelle Pedigo has permanently been named Director of Housing Management. She upholds the culture of HASLO and brings a breadth of knowledge to the position. Clover Robinson has taken on Pedigo's former role as Interim Deputy Finance Director. Sandra Bourbon is managing both Resident Services and the Supporting Housing Program.

Regarding polling voters about affordable housing, People's Self-Help Housing, Paso Robles Housing Authority, and HASLO hope to get the poll out before the end of January/early February.

The compensation study will be brought to the board in February or March with any changes retroactive to January.

**DISCUSSION ITEMS I:**

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

The Commissioners confirmed that the current officers want to continue in their roles with Ashlea Boyer as Chairman and Patty Souza as Vice Chairman.

**ACTION TAKENS:**

A motion to adopt **Resolution No. 7 (2024 Series) Electing Chair and Vice Chair of the Housing Authority of the City of San Luis Obispo, with a correction to the resolution that the appointments are valid until the January 2025 annual meeting**, was made by Commissioner Crotser, seconded by Commissioner Souza, and approved on the following roll call vote:

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

A motion to 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** was made by Commissioner Crotser, seconded by Commissioner Souza, and approved on the following roll call vote:

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

**CONSENT AGENDA:**

- C1. **MINUTES OF THE BOARD OF COMMISSIONERS REGULAR 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**

Collins thanked Bourbon for the addition of the Supportive Housing Program report.

The Commissioners requested a correction to the spelling of “deferred” in the minutes.

**ACTION TAKEN:** A motion to approve all Consent Agenda items with the correction noted was made by Commissioner Souza, seconded by Commissioner Shower, and unanimously approved.

**DISCUSSION ITEMS II:**

**2. ADDING SIGNERS AND TRUSTEES FOR RETIREMENT ACCOUNTS**

**ACTION TAKEN:** A motion to adopt **Resolution No. 9 (2024 Series) Authorizing Signers and Trustees for Retirement account(s)** was made by Commissioner **Boyer**, seconded by Commissioner **Souza**, and approved on the following roll call vote:

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

**3. HASLO UTILITY ALLOWANCE FOR HOUSING CHOICE VOUCHER PROGRAMS**

Robinson stated that utilities for trash and natural gas increased significantly.

**ACTION TAKEN:** A motion to adopt **Resolution No. 10 (2024 Series) Approving Utility Allowances for the Housing Choice Voucher Programs** was made by Commissioner **Crotser**, seconded by Commissioner **Jeffries**, and approved on the following roll call vote:

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

**4. TEAM ENGAGEMENT FINAL REPORT**

Collins provided a PowerPoint presentation providing the results of HASLO's team engagement and organizational strategy. Initial Focus was on internal needs and strengthening unity within the organization. The next phase will look outside the organization. Commissioners and staff discussed outside resources and possible social media presence by sites.

**There being no further business, the meeting was adjourned at 12:59 p.m.**

**Respectfully submitted,**

**Scott Collins, Secretary**

## **Executive Summary**

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

- SEMAP Report
  - The closing for PIC was successful for the month of January and the SEMAP report 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. As part of this board package, we are presenting a table with the most significant changes to the admin plan. We won't be able to finalize the new admin plan until HUD completes its software changes. The current software is not capable of incorporating many of the required admin plan updates.
  - 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.
  - We've also begun leasing some regular vouchers in order to replace vouchers lost through attrition. It's important to maintain our leasing levels in order to maximize future funding.
  - Given the uncertainty of the upcoming federal budget, we are holding off on any larger 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 allowed us to start leasing Mainstream vouchers again. We will also be applying for additional Mainstream funding since our current funding is not sufficient to cover the average per unit cost of these vouchers.

## Acronyms

- EHV: Emergency Housing Vouchers
- HAP: Housing Assistance Payment
- HIP: Housing Information Portal
- HOTMA: Housing Opportunity Through Modernization Act
- NSPIRE: National Standards for the Physical Inspection of Real Estate
- PIC: PIH Information Center
- PIH: Public and Indian Housing

# SEMAP Indicators Report

## As of January 31, 2024

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

 [Download in Excel](#)
 [Print Page](#)
 [Back to Report](#)

### Current SEMAP Indicator Information

### Most Recent SEMAP Indicator Information

#### Reporting Rate as of January 31, 2024

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	2489	12/23	20	38	2507	2727	100

#### Indicator 9: Annual Reexaminations

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

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

1

Number of Families in Current Database	Number of Late Reexaminations
2914	27

[\[+\] Families with reexaminations overdue](#)

#### Indicator 10: Correct Tenant Rent Calculations

**Percent of Families with incorrect rent calculation (%)**  
 (SEMAP scores zero points when more than 2 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
1751	0

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



**Indicator 11:  
Precontract HQS Inspections**

Percent of units that did pass HQS inspection before the beginning date of the assisted lease and HAP contract (%)  
(SEMAP scores zero points when fewer than 98 percent of newly leased units pass the HQS inspection before the beginning of the lease/HAP as indicated by percentages as shown in red and bold.) **100**

Number of Families in Current Database	Number of Inspections On or Before Effective Date
412	412

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

**Indicator 12:  
Annual HQS Inspections**

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

Number of Families in Current Database	Number of Late Inspections
2361	6

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

**Indicator 13:  
Lease-Up**

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

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

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

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

Number of Mandatory Slots (#)*	Number of Families Enrolled (#)	Percent of Families Enrolled (%)	Number of Families with Progress Report and Escrow Balances (#)	Percent of Families with Progress Report and Escrow Balances (%)
0	65	<b>0</b>	54	86

[\[+\] Families enrolled in Voucher FSS Program](#)

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[\[+\] Families completing FSS Contract](#)

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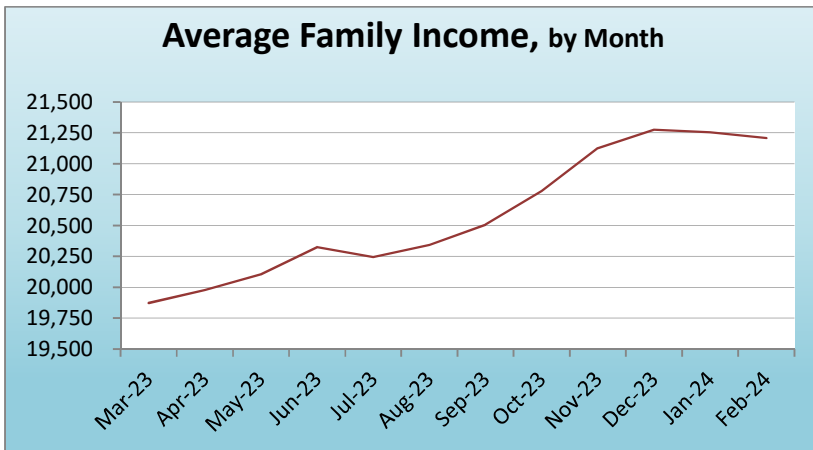
\* - As reported by the PHA in Indicator 14 (a) from the last SEMAP Certification and confirmed by the Field Office. This number may have decreased as families have graduated from the program. Also data may not include approved exceptions to mandatory slots.

# HASLO

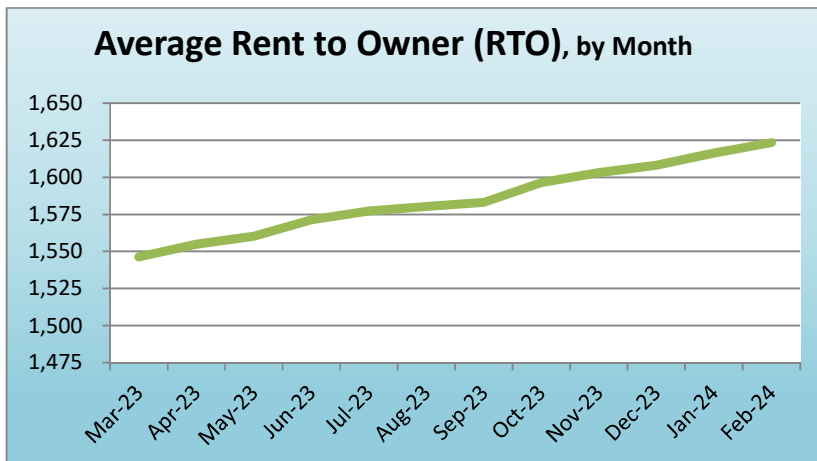
## Voucher Monthly Analysis (VMA)

### Rolling 12 months, with projections through Feb 2024

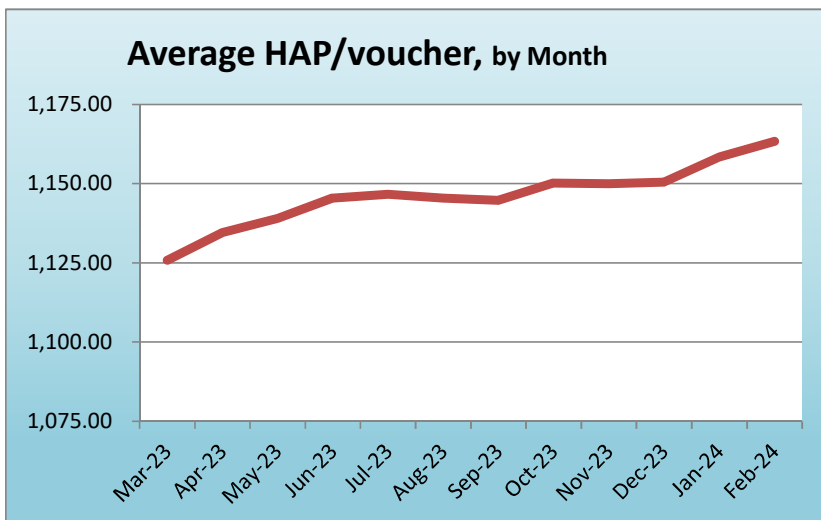
Note: includes Welcome Home Vouchers (EHV)



Average HH Income, 12 month % change: 6.7%



RTO, 12 month % change:  
(including new leases) 5.0%



Average HAP, 12 month % change: 3.3%

#### Notes:

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

**Housing Authority of San Luis Obispo**  
**Housing Choice Voucher Lease up and Funding Analysis**  
**February 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.

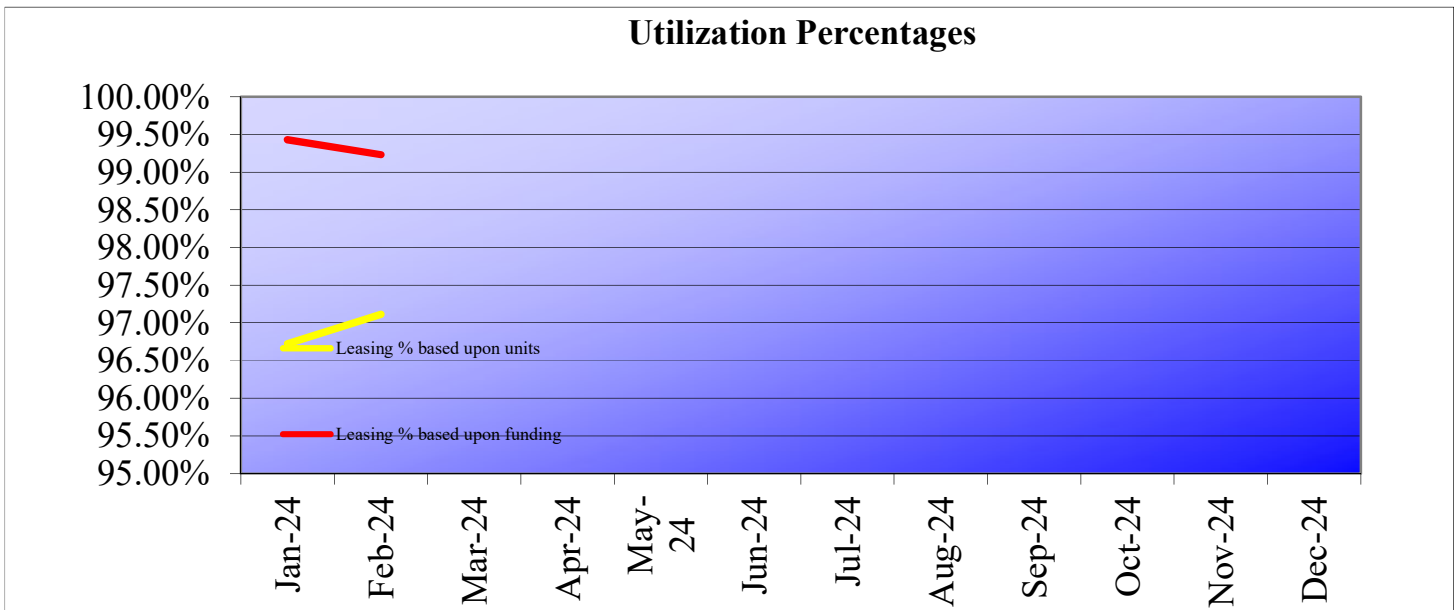
We have yet to received our 2024 funding numbers and may not receive for a couple more months. We are using an estimated 3% inflation factor increase of funding for 2024 based on information we have received from HUD. The goal this year is to have strong leasing numbers while preparing for a potential decrease in funding for 2024.

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**  
**February 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%	\$ 2,867,191	\$ 2,850,881	\$ 16,310	99.43%	\$ 1,150
February 2024	2,563	2,489	97.11%	\$ 2,867,191	\$ 2,845,167	\$ 22,024	99.23%	\$ 1,143
March 2024								
April 2024								
May 2024								
June 2024								
July 2024								
August 2024								
September 2024								
October 2024								
November 2024								
December 2024								
<b>YTD</b>	<b>5,126</b>	<b>4,968</b>	<b>96.92%</b>	<b>\$ 5,734,382</b>	<b>\$ 5,696,048</b>	<b>\$ 38,334</b>	<b>99.33%</b>	<b>\$ 1,147</b>



NRA + Prog Reserve Balance (Excess HAP) as of 1/1/2024	\$ 1,611,076	YTD Voucher	YTD	
HAP Funding YTD:	\$ 5,734,382	Months Available	Vouchers Leased	
HAP Expenditures YTD:	\$ 5,696,048			
HAP Revenue (Fraud, FSS Forfeits) YTD:	\$ -	Regular Vouchers	4,580	4,482 97.9%
Current Remaining NRA / Prog Reserve:	\$ 1,649,410	Veterans (VASH)	452	407 90.0%
Months in Reserves at Current Monthly Expense Levels		Family Unification	94	79 84.0%
Reserves as a Percentage of Budget Authority	4.8%	Total Vouchers	5,126	4,968 96.9%
Current Monthly Funding (a)	\$ 2,867,191	Mainstream	366	348 95.1%
Current Average HAP Payment (b)	\$ 1,143	Emergency Housing	392	381 97.2%
# of Units the Current Monthly Funding Would Support (a)/(b)	2,508			
# of Units Currently Leased	2,489			
Excess Units Leased, Current Month	(19)			
Current Year-to-Date Funding (a)	\$ 5,734,382			
Current Year-to-Date Average HAP Payment (b)	\$ 1,147			
# of Unit-Mos the Current Monthly Funding Supports (a)/(b)	5,001			
# of Unit-Mos Leased Year-to-Date	4,968			
Excess Unit-Mos Leased, Year-to-Date	(33)			

**Vacancy Summary  
as of 1/31/24**

	<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 1/31</u>
	<u>Current Month</u>	<u>Rolling 12 Month</u>		<u>of GPR</u>	<u>% of GPR</u>					
<b>**NOTE: All day counts include weekends**</b>										
<b><u>Tax Credit Properties</u> (rolling 12 months)</b>										
860 on the Wye	\$0	\$0	\$317,796	0.95%	0.00%	6	5%	1	20	95%
Atascadero	\$0	\$2,766	\$286,452	1.76%	0.97%	49	11%	2	19	100%
Bishop Street Studios	1,344.00	\$16,196	\$523,036	1.01%	3.10%	102	12%	4	33	97%
Brizzolara	\$0	\$3,174	\$447,768	2.00%	0.71%	9	7%	2	30	100%
Carmel	1,276.00	\$2,980	\$309,420	1.18%	0.96%	35	11%	2	19	95%
Courtyard	\$1,310	\$16,508	\$696,228	1.15%	2.37%	60	29%	10	35	100%
DRT (Johnson)	\$0	\$1,571	\$667,620	0.79%	0.24%	51	8%	3	40	100%
Halcyon	\$1,636	\$6,562	\$312,828	1.00%	2.10%	45	25%	5	20	100%
Hidden Creek	\$1,682	\$7,677	\$1,414,344	0.26%	0.54%	29	14%	11	80	98%
Ironworks	\$0	\$17,522	\$866,508	2.46%	2.02%	75	15%	7	46	100%
RAD175/SLO Villages	1,885.00	\$35,642	\$3,182,748	1.00%	1.12%	51	14%	25	175	99%
Islay Hills (Ironbark)	\$0	\$3,939	\$385,188	1.27%	1.02%	56	10%	2	20	100%
Laurel (Marvin Gardens)	\$1,059	\$2,118	\$410,448	1.27%	0.52%	36	8%	2	24	96%
Pismo Buchon	\$0	\$2,997	\$188,436	1.27%	1.59%	87	18%	2	11	100%
Willow Walk	\$0	\$4,661	\$744,048	2.00%	0.63%	30	10%	4	39	100%
<b>Total, Tax Credit Properties</b>	<b>\$10,192</b>	<b>\$124,313</b>	<b>Average=</b>	<b>1.29%</b>	<b>1.19%</b>	<b>48</b>	<b>13%</b>	<b>5</b>		<b>99%</b>
<b><u>SLONP Properties</u> (rolling 12 months)</b>										
Blue Heron	\$0	\$0	\$243,648	0.58%	0.00%	22	7%	1	14	100%
Empire	1,100.00	\$3,901	\$174,720	1.00%	2.23%	60	15%	2	13	92%
Ferrell	2,030.00	\$12,089	\$194,832	1.64%	6.20%	57	38%	3	8	88%
Macadero	\$1,565	\$19,321	\$370,800	9.06%	5.21%	78	37%	7	19	100%
Margarita	\$0	\$1,133	\$433,644	1.12%	0.26%	17	5%	1	21	100%
<b>Total, SLONP Properties</b>	<b>\$4,695</b>	<b>\$36,444</b>	<b>Average=</b>	<b>2.68%</b>	<b>2.78%</b>	<b>47</b>	<b>20%</b>	<b>3</b>		<b>96%</b>
<b><u>EIHC Properties</u> (rolling 12 months)</b>										
Poinsettia	-	\$713	\$431,172	4.00%	0.17%	36	5%	1	20	100%
<b>Total, EIHC Properties</b>	<b>\$0</b>	<b>\$713</b>								
<b><u>50059/Other Properties</u> (rolling 12 months)</b>										
Dan Law	\$1,225	\$9,958	\$131,400	2.54%	7.58%	101	33%	3	9	89%
Parkwood	\$0	\$18,204	\$639,948	4.00%	2.84%	59	15%	5	34	100%
<b>Total, 50059/Other Properties</b>	<b>\$1,225</b>	<b>\$28,162</b>	<b>Average=</b>	<b>5.21%</b>	<b>5.21%</b>	<b>80</b>	<b>24%</b>	<b>4</b>		<b>94%</b>
	<b>\$16,112</b>	<b>\$189,632</b>	<b>Overall Average=</b>	<b>1.84%</b>		<b>50</b>	<b>15%</b>	<b>5</b>		<b>98%</b>
<i>prior month</i>	\$13,113		<i>Prior Month Overall=</i>	1.72%		52	12%	4		98%
<i>% increase/(decrease)</i>	23%		<i>net change</i>	0.12%		-2	3%	1		0%

February 7, 2024

To: HASLO Board of Commissioners  
 From: Sandra Bourbon, Director of Resident Services  
 Re: January 2024

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

Continued outreach, case management and annual assessments. The below chart is as of 01-31-2024 (2023 FSS grant).

<b>Active</b>	65
<b>New contracts added this month</b>	2
<b>Graduates this grant period</b>	0
<b>Terminated for Non-Compliance/Contract Expired/Voluntary Termination this grant period</b>	0
<b>Active participants who have ported out this grant period</b>	0
<b>Increase in Earned Income this month</b>	996,656
<b>Increase in Total Tenant Payment (TTP) this month</b>	18,252
<b>Total Escrow Accounts</b>	55
<b>New Escrow Accounts this grant period</b>	1
<b>Percentage of participants with an Escrow Account this month</b>	84.62%
<b>Total Escrow Account balance</b>	368,018
<b>Total of Escrow Account funds paid out to FSS Graduates for this grant period</b>	0
<b>Forfeited Escrow Balance 2022</b>	2,496
<b>Forfeited Escrow Balance 2023</b>	23,316.14
<b>Forfeited Escrow Funds paid to participants (2023)</b>	8,521.83
<b>Total Forfeited Escrow Account Balance</b>	17,290.31

**Savings Incentive Program (SIP):**

We are introducing another savings program for 2024 at the request of our participants. This program will start on March 1, 2024 and run for 4 months. Same guidelines.

Final closeout documents were sent to HUD for the 2022 FSS NOFO and we are now into the 2023 FSS NOFO.

**SERVICES:**

- We are collaborating with the SLO Food Bank on their Nut Butter drive
- Oral health focus group in collaboration with SLO Public Health
- Working with CA Phones to present at Willow Walk in Nipomo
- Senior site activities (landscape painting)
- Learning Centers in person and virtual at family properties (games, canvas painting and clay sculptures)

\*Attached is an example of a “monthly” newsletter that is attached to property calendars



# Community Resources & Activities Newsletter

## January 2024

### Local Resource Hotline Numbers:

#### **SLO Behavioral Health Access Line: 1-800-838-1381**

Services are Monday-Friday 8am-5pm. Our phone lines may be very busy at first; please be patient and be assured that a staff member will return your call.

#### **Central Coast Hotline: 1-800-783-0607**

Central Coast Hotline is a confidential mental health crisis line which also provides mental health resource information. Call or text 24 hours a day, 365 days a year. Free of charge.

#### **Lumina Alliance: (805) 545-8888**

Crisis intervention and treatment services to survivors of sexual and intimate partner violence and their loved ones. Services are provided confidentially, at low or no cost, to anyone regardless of age, ethnicity, gender, sexual orientation, religion, or ability. All crisis services are available 24 hours a day in Spanish and English.

#### **SLO Alcoholics Anonymous Hotline: (805) 541-3211**

Local Alcoholics Anonymous (AA) 12-Step Recovery services. 24/7 hotline is staffed by volunteers. The Central Coast Intergroup has also made Remote Meetings available throughout the county.



### EBT Online

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>

### SESLOC's FREE Financial Education 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/>



### Dairy Free Lemon Scones

#### Ingredients:

- 2 cups all-purpose flour
- 1/2 cup sugar
- 3 teaspoons baking powder
- 1 teaspoon salt
- 1/2 cup coconut oil, room temperature
- 2 tablespoons grated lemon zest
- 1/2 cup refrigerated unsweetened coconut milk

#### TOPPING:

- 1 tablespoon refrigerated unsweetened coconut milk
- 1 tablespoon coarse sugar

#### Directions:

Preheat oven to 375°. In a large bowl, whisk flour, sugar, baking powder and salt. Cut in coconut oil until mixture resembles coarse crumbs. Stir in coconut milk and zest just until moistened.

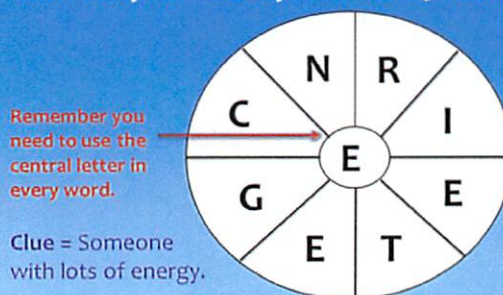
Turn onto a lightly floured surface; knead gently until dough holds together when pressed. Pat dough into an 7-in. circle. Cut into 8 wedges. Place wedges on a greased baking sheet. Brush scones with coconut milk and sprinkle with coarse sugar. Bake until golden brown, 15-20 minutes. Serve warm.

### 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](mailto:wendy.beres@dignityhealth.org)

**FREE Covid Tests are available upon request.**  
Please contact Katie Arras at 805-891-8102 or [karras@haslo.org](mailto:karras@haslo.org) if you are interested.  
Limited stock available.

### How many words can you make in 5 minutes?



Remember there is at least one nine letter to find.



February 7, 2024

To: HASLO Board of Commissioners  
From: Sandra Bourbon, Director of Resident Services  
Re: January 2024

**Supportive Housing Program (SHP):**

- SHP consists of 6 case managers with 2 of the case managers onsite at Paso Home Key.
- We currently manage 852 units and out of those we provided case management to 139 residents for the month of January.
- We closed 7 cases (one client moved to assisted living)
- The priority for SLO SHP case managers in January was to conduct the initial SHP interview for applicants at Rock View Apartments in Morro Bay.

Outside agencies we collaborated with this month are:

Assurance Wireless  
RTA  
Independent Living Resource Center (ILRC)  
Psychiatric Health Facility (PHF)  
Behavioral Health  
SLO County Drug and Alcohol  
Pathpoint  
ALF Food Pantry  
Meals on Wheels  
Department of Social Services to include APS, CalFresh and IHSS  
5 Cities Homeless Coalition  
CAPSLO (Head Start/Parent Connection/HEAP)  
SLO Courts  
Marian Hospital  
The Link  
Salvation Army  
Jewish Family Services  
St. Vincent De Paul  
TruConnect  
SLO County Probation  
ECHO  
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  
Family Care Network

Success stories:

Custody arrangement between a father and son  
Helped family move from an apartment to a house  
Improved mental health and attendance in parenting classes  
Connected client with a therapist  
Assisted in the process of offering 9 families housing at Rock View  
Financial assistance to prevent eviction  
Rental and deposit assistance  
Housekeeping progress

A few challenges:

Slow progress  
Prevention and the cost of home damages due to severe mental illness  
Residents with active drug addiction  
Residents with severe mental illness and self-medicating  
Coordinating services with resident family members

## 2024 Administrative Plan Changes

Attached is a table of the major changes proposed for the 2024 Administrative Plan (admin plan). The admin plan is the document that guides how HASLO will manage the Housing Choice Voucher (HCV) department. We are not able to finalize the admin plan changes until HUD finalizes all of its guidance and rolls out its new software. Industry experts believe that once HUD finalizes its part they will want us to move quickly to implement the changes. In anticipation of that, we are requesting input from the Board on the major changes now. This way, when HUD is ready, all major issues will already be decided.

Many of these changes are required by federal legislation known as the Housing Opportunity Through Modernization Act of 2016 (HOTMA).

The farthest right column of the table on the next page indicates whether this is a required change or if HASLO has any discretion in its policies on the particular topic. For the policies in which HASLO does have discretion, we used the following principles to drive our recommended decisions:

- 1.) **Promoting self-sufficiency of our clients:** The choice to not conduct interim reexaminations for any increases in earned income is a new option under HOTMA. Implementing this will help clients save income increases rather than immediately paying a higher rent amount. The higher rent will be put in place at the time of their annual reexamination. This may result in short-term increases in HAP spending since the tenant contribution will not be increased as often. We believe this will be offset in the long run by allowing clients to save funds and incentivizing them to earn more income throughout their time on the HCV program. The ultimate goal is to give clients the ability to eventually move off the program and leave the voucher available for someone else.
- 2.) **Reducing staff workload:** In the past, when federal funding was limited, HUD reduced PHA admin fees rather than making large cuts to HAP funding. The admin fees fund staff salaries and other overhead costs associated with running the HCV program. Given the uncertainty in the current Federal budget year process, our choices reflect that we may have less operating funding available and need to find efficiencies. Choices like allowing self-certifications and limiting interim reexaminations were made with this in mind.

2024 Admin Plan – Policy Change Summary

Topic	Prior Policy	New Policy	PHA Discretion
<b>Definition – Foster Adult/Foster Child (HOTMA change)</b>	Uses terms but doesn't provide definitions	Establishes definition for Foster Adult and Foster Child	None
<b>Definition – Family (HOTMA change)</b>	Current definition: "Family" is used interchangeably with "Applicant" or "Participant" and can refer to a single-person family.	Revises definition to include a single person who is at least 18, but not over 24 years of age, who has left foster care and is homeless or at risk of being homeless.	None
<b>Guests (HASLO change)</b>	Guests limited to 14 consecutive days and 14 cumulative days in 12 months	Guests limited to 14 consecutive and <b>30 cumulative days</b> in 12 months	The number of days is not regulatory and up to PHA's discretion. The goal is to allow legitimate guests but prevent program abuse by misrepresenting a family member with income as a guest. The prior limit of 14 cumulative days may have been overly restrictive and limited legitimate guests.
<b>Temporary Absence (HASLO change)</b>	Temporary absences that are not related to work, medical or other exceptions are limited to 30 days unless granted an extension up to a total of 180 days.	Temporary absences that are not related to work, medical or other exceptions are limited to <b>90 days</b> unless granted an extension up to a total of 180 days.	The number of days is not regulatory. The 180-day limit is consistent with HUD regulations regarding absences of an entire family. PHA has discretion to choose an appropriate time limit.
<b>VASH Income Limit (HASLO change)</b>	Eligibility limited to extremely low income	Allowed to include <b>low 80% income</b> individuals as eligible	Can elect not to allow incomes up to 80%. Previously approved amendment to the admin plan.
<b>Asset Limitation – Eligibility (HOTMA change)</b>	N/A	Restricts eligibility if a family owns real property suitable for occupancy or has assets in excess of \$100,000 (cap will increase annually).	None

Topic	Prior Policy	New Policy	PHA Discretion
<b>Consent to Release Information (HOTMA change)</b>	Signed annually	Signed once and in effect until revoked. Revoking consent will result in termination.	PHA can elect not to terminate if consent is revoked, but it would be impractical to allow someone to remain on the program without consent to verify their financial information.
<b>Denial of Assistance (HASLO change)</b>	Automatic denial if convicted of manufacturing meth on the premises of federally assisted housing	Automatic denial if convicted of manufacturing meth on <b>any premises</b> .	PHA can elect to deny only if manufacturing took place on the premises of federally assisted housing. Limiting it to federal housing seem arbitrary and not in the best interest of the community.
<b>Calculating Annual Income (HOTMA change)</b>	Anticipated income is used for all action types	Anticipated income is used at initial occupancy and interim reexaminations. At annual, the income from the previous 12 months, adjusted for any changes that took place since the last annual, is used. Income from assets is always anticipated income.	None
<b>Calculating Annual Income (HOTMA change)</b>	Exclusions for “temporary, nonrecurring, or sporadic income (including gifts)”	Incomes of day laborers, independent contractors, and seasonal workers are all included in income	None
<b>Earned Income Disallowance (HOTMA change)</b>	Allowed for earned income disallowance program that phased in increases in earned income over a 24 months period for tenants previously out of work.	New enrollments in EID are not allowed. Families already enrolled may finish out their 24-month period. All EIDs should be done by 12/31/25.	None
<b>Student Financial Assistance (HOTMA change)</b>	All types of assistance are treated the same in terms of including them in annual income. For clients under 24 or have no dependent children, all sources are excluded up to the amount of actual costs. For clients over 23 and have a dependent all assistance is excluded.	Creates two types of assistance, each with different requirements. For clients under 24 or have no dependent children, sources of assistance from programs under 479B of the HEA are fully excluded, other sources are excluded up to the amount of actual costs. For clients over 23 and	None

Topic	Prior Policy	New Policy	PHA Discretion
		<p>have a dependent all assistance is excluded.</p> <p><i>**Note that the requirement to take age into consideration is unique to the Section 8 program and not included in Public Housing and Multi Family. The language comes from the annual Appropriations Act and could change from year to year.</i></p>	
<b>Income From Assets (HOTMA change)</b>	Passbook rate set in admin plan, currently 0%, to impute income when there is no actual income.	Rate is set annually by HUD. Rate is .06% for 2024.	None
<b>Classification of Assets (HOTMA change)</b>	No exclusion of non-necessary personal property	Exclude non-necessary personal property that doesn't exceed \$50,000 (adjusted annually)	None
<b>Self-Certification of Assets (HOTMA change)</b>	Allowed to self-certify if net family assets total \$5,000 or less	Allowed to self-certify if net family assets total \$50,000 or less (cap will increase annually). Must fully verify assets every three years.	PHA's are not required to allow self-certification of assets.
<b>Dependent Deduction (HOTMA change)</b>	Fixed deduction of \$480 per year	Deduction is \$480 for 2024 and will increase annually by a HUD published factor	None
<b>Elderly Deduction (HOTMA change)</b>	Fixed deduction of \$400 per year	Deduction is \$525 for 2024 and will increase annually by a HUD published factor	None
<b>Medical Expenses (HOTMA change)</b>	Definition of medical expenses aligns with IRS Publication 502	No longer allowed to align with IRS Publication 502. Definition revised to "any costs incurred in the diagnosis, cure, mitigation, treatment, or prevention of disease or payments for treatments affecting any structure or function of the body. Health and medical care expenses include medical insurance premiums and long-term care premiums that are paid or anticipated during the period for which annual income is computed."	None

Topic	Prior Policy	New Policy	PHA Discretion
<b>Medical Expense Threshold (HOTMA change)</b>	Deduct anything over 3% of income	Deduct anything over 10% of income (allows for phase-in for clients currently receiving deductions for anything over 3%)	None
<b>Hardships (HOTMA change)</b>	Hardship available for minimum rent requirement	Hardships available for minimum rent, increased medical expenses, child care expenses, or a change in circumstance that would not otherwise trigger an interim reexamination	Limited. Discretion is only allowed around the means in which a hardship is requested and how clients are notified of denial or approval of the request.
<b>Interim Reexaminations (HOTMA change)</b>	Interim reexaminations are conducted for any change in earned income more than \$200/month	An interim reexamination will only be conducted for adjusted income decreases of 10% or more. No interim will be processed for any increase in <b>earned income</b> . An interim will be processed for increases in <b>unearned income</b> of 10% or more.	PHA's have the option of not processing interim reexaminations for any increase in earned income or processing them only if there has been prior decrease in income since the last annual. The rules regarding interim reexaminations for unearned income are not discretionary.
<b>Non-income interim reexaminations (HOTMA change)</b>	N/A	New certification type to record changes in family composition that would not otherwise trigger an interim examination	None
<b>Effective Date of Changes (HOTMA change)</b>	Rent decreases reported timely are effective the first of the month following the month the <b>change was reported</b> .	Rent decreases reported timely are effective the first of the month after the date of the <b>actual change</b> .	None
<b>Repayment Agreements (HASLO change)</b>	Terms: 20-50% down payment, minimum monthly payment of \$50, maximum term of 18 months (24 with finance director approval)	Monthly payment is based on 40% of adjusted monthly income less rent and UA at the time of the agreement. Can be renegotiated with changes in income.	PHA's can set their own policies on the amount and length of repayment agreements. PHA's are not allowed to forgive any debt owed. New policy ensures that payment plans are practical and affordable.