

# Boards of Commissioners Meeting

March 24, 2015



# AGENDA

O (559) 443-8400

F (559) 445-8981

1331 Fulton Mall

Fresno, California 93721

TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

## Regular Joint Meeting of the Boards of Commissioners of the Fresno Housing Authority

**5pm March 24, 2015**

**1331 Fulton Mall, Fresno, CA 93721**

Interested parties wishing to address the Boards of Commissioners regarding this meeting's Agenda Items, and/or regarding topics not on the agenda but within the subject matter jurisdiction of the Boards of Commissioners, are asked to complete a "Request to Speak" card which may be obtained from the Board Secretary (Tiffany Mangum) at 4:45 p.m. You will be called to speak under Agenda Item 3, Public Comment.

The meeting room is accessible to the physically disabled, and the services of a translator can be made available. Requests for additional accommodations for the disabled, signers, assistive listening devices, or translators should be made at least one (1) full business day prior to the meeting. Please call the Board Secretary at (559) 443-8475, TTY 800-735-2929.

**4pm Fresno Housing 75<sup>th</sup> Workshop**

**5pm Board Meeting**

PAGE #

1. Call to Order and Roll Call
2. Approval of agenda as posted (or amended)
3. Public Comment

This is an opportunity for the members of the public to address the Boards of Commissioners on any matter within the subject matter jurisdiction of the Boards of Commissioners that is not listed on the Agenda. At the start of your presentation, please state your name, address and/or the topic you wish to speak on that is not on the agenda. Presentations are limited to a total of three (3) minutes per speaker.

4. POTENTIAL CONFLICTS OF INTEREST – *Any Commissioner who has a potential conflict of interest may now identify the item and recuse themselves from discussing and voting on the matter. (Gov. Code section 87105)*

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**5. Consent Agenda**

- |   |    |
|---|----|
| a. Consideration of the Minutes of February 24, 2015  | 10 |
| b. City: Authorization to Charge-Off Uncollectible Accounts<br>1 <sup>st</sup> Quarter 2015           | 17 |
| c. County: Authorization to Charge-Off Uncollectible<br>Accounts 1 <sup>st</sup> Quarter 2015         | 22 |
| d. Consideration of the Conflict of Interest Code   | 27 |
| e. Consideration of the Payroll Taxes and Deductions Policy   | 36 |
| f. Consideration of the Pay Period Policy   | 42 |
| g. Consideration of Mixed Finance and Internal Revenue<br>Code Section 42 Utility Allowance Schedules | 46 |
| h. Ratification of Application Submission – Veterans Affairs<br>Supportive Housing (VASH)             | 65 |

**6. Informational**

- |  |    |
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| a. Performance Management Overview   | 68 |
| b. Resident Services Strategy  | 69 |
| c. Leveraging the HCV Program to Improve Quality<br>Housing: Inspections by Zip Code | 71 |
| d. Fresno Housing 75 <sup>th</sup> Celebration Overview                              | 76 |

**7. Action – Commissioners may Consider, Approve, Deny, and/or Continue**

- |   |    |
|---|----|
| a. Consideration of the 2015 Capital Fund Budget                            | 77 |
| b. Consideration of Acceptance of the Operating and HAP<br>Results for 2014 | 86 |

**8. Executive Director's Report** 92**9. Adjournment**

## BOARD MEMO

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**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** WORKSHOP

**AUTHOR:** Brandi Johnson

**SUBJECT:** WORKSHOP - 75<sup>th</sup> Anniversary Messaging and Communication Strategies

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### Executive Summary

The purpose of this memo is to inform you that the upcoming workshop will include an overview of key messaging we have developed for our 75<sup>th</sup> Anniversary Celebration that strategically aligns with our mission and communications strategies. Additionally, at the Board Workshop, we will continue to discuss messaging options for our communication strategies.

# *Fresno Housing Celebrates 75 Years*

*Board of Commissioners Meeting  
March 24, 2015*



CELEBRATING  
**75**  
YEARS<sup>2</sup>  
FRESNO HOUSING



## ***75<sup>th</sup> Anniversary Goals***

1. Increase Visibility and Image
2. Break Stereotypes
3. Acknowledge Accomplishments
4. Enhance Communications



CELEBRATING  
**75**  
YEARS <sup>3</sup>  
FRESNO HOUSING

DRAFT

# ***Messages***

- Fresno Housing Overview
- Place
- People
- Partnerships
- Public



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



DRAFT

# *Fresno Housing Overview*

- Who We Are and What We Do
- Mission Awareness
- Key Message:
  - Fresno Housing is about a lot more than housing, but we believe housing is core. We create vibrant communities and quality housing, and we work to engage our residents to excel in school and work.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



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# Place

- Development
- Design Matters
- Renovations
- Housing Quality Standards
- Key Message:
  - For 75 years, Fresno Housing has worked throughout Fresno County to create quality affordable housing and an array of programs to build vibrant communities.



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# People

- Resident Engagement
  - Programs and Services
  - Self-sufficiency
- Staff Engagement
  - Increased Communication
  - Leadership through ABCD
- Key Message:
  - As Fresno Housing celebrates 75 years, it celebrates its staff, our families, and its many partners who help the agency ensure that educational, social and health programs are integrated into housing.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



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# *Partnerships*

- Key Message:
  - With 75 years of experience, Fresno Housing recognizes and embraces the power of partnership- collaborating with public and non-profit partners who help the agency ensure that educational, social, and health programs are integrated into housing.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



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# ***Public***

- Creating vibrant communities
- Creating change and making an impact beyond our walls
- Key Message:
  - Fresno Housing has been changing the definition of housing and development-strengthening and rejuvenating neighborhoods by leveraging funds and improving infrastructure in order to maximize opportunities for individuals and families.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



DRAFT

**Minutes of the Joint Meeting**  
**Of the Boards of Commissioners of the**  
**HOUSING AUTHORITIES OF THE CITY AND COUNTY OF FRESNO**

**Tuesday, February 24, 2015**

**5:00 P.M.**

The Boards of Commissioners of the Housing Authorities of the City and County of Fresno met in a regular joint session on Tuesday, February 24, 2015, at the offices of HACCF, located at 1331 Fulton Mall, Fresno, California.

1. The meeting was called to order at 5:02 P.M. by Board Chair, Commissioner Scharton of the Board of Commissioners of the Housing Authority of the City of Fresno. Commissioners present and absent were as follows:

COMMISSIONERS PRESENT:      CRAIG SCHARTON, Chair  
   ADRIAN JONES, Vice Chair  
   STEVEN BEDROSIAN  
   TIM LOWE  
   KARL JOHNSON  
   JORGE AGUILAR

COMMISSIONERS ABSENT:      RUEBEN SCOTT

The meeting was called to order by Board Chair, Commissioner Sablan, of the Board of Commissioners of the Housing Authority of Fresno County at 5:02 P.M. Commissioners present and absent were as follows:

COMMISSIONERS PRESENT:      STACY SABLAN, Chair  
   RENEETA ANTHONY, Vice Chair  
   JIM PETTY  
   OSVALDO VERA  
   NANCY NELSON  
   LEE ANN EAGER

COMMISSIONERS ABSENT:      None.

Also, in attendance were the following: Preston Prince, CEO/Executive Director; Tracewell Hanrahan, Deputy Director; Rebecca Craigo, Chief Operations Officer and Ken Price, Baker Manock and Jensen - General Counsel.

2. APPROVAL OF AGENDA AS POSTED (OR AMENDED)

*Commissioner Johnson motioned for the City Board's approval of the agenda as posted. This action was seconded by Commissioner Bedrosian, and by unanimous vote of the Board of Commissioners for the City, the agenda was approved as posted.*

*Commissioner Petty motioned for the County Board's approval of the agenda as posted. This action was seconded by Commissioner Vera, and by unanimous vote of the Board of Commissioners for the County, the agenda was approved as posted.*

### 3. PUBLIC COMMENT

No public comment.

### 4. CONSENT AGENDA

#### a. Consideration of the Minutes of January 27, 2015

*Commissioner Jones motioned for the City Board's approval of the consent agenda. This action was seconded by Commissioner Johnson, and by unanimous vote of the Board of Commissioners for the City, the consent agenda was approved.*

*Commissioner Petty motioned for the County Board's approval of the consent agenda. This action was seconded by Commissioner Eager, and by unanimous vote of the Board of Commissioners for the County, the consent agenda was approved.*

### 5. INFORMATIONAL

#### a. Leveraging the HCV Program to Improve Quality Housing

Tracewell Hanrahan, Deputy Director, opened the informational item in reflection of the January Board Meeting.

Juan Lopez, Senior Analyst-Quality Assurance, provided an overview on the types of Housing Quality Standards (HQS), an analysis of inspection types, and discussed commonly failed items.

There was further discussion between the Board members and the staff concerning HQS, and the impacts our programs have on our residents and the broader community.

#### b. 2015 Budgets – Mixed Finance Properties

Juan Lopez presented a brief overview of the mixed finance properties for the years 2014 and 2015. After giving an overview of mixed finance developments to the



Commissioners, Mr. Lopez summarized the Fresno Housing mixed finance properties that are currently in operation and have been developed since 2008. Mr. Lopez also provided further information on the 2014 financial results, the 2014 annual cash flow distribution, and the 2015 budget.

c. Housing Relinquished Fund Corps Update

Emily Williams, Finance Manager, presented an update on the Housing Relinquished Fund Corporation (HRFC). The analysis included the actual inflows and outflows as of December 31, 2014, as well as potential inflows and commitments for 2015.

d. Development Update

Tracewell Hanrahan presented the development update, providing an overview of the stages for the Lowell Project and the African American Historical and Cultural Museum.

Preston Prince, CEO/Executive Director, apologized to the Boards about information concerning the African American Historical and Cultural Museum getting ahead of the Agency. He explained that the conversation and planning is in the very early stages.

There was a brief discussion regarding sustainability, museum funding, and staff preparing a full analysis of the project before the Boards take action.

6. ACTION ITEMS-COMMISSIONERS MAY CONSIDER, APPROVE, DENY, AND/OR CONTINUE

a. Fultonia West/Cedar Heights – Consideration of Omnibus Resolution

Michael Duarte, Senior Manager of Development, introduced an omnibus resolution recommending the Boards adopt the attached resolution. The resolution is authorizing the execution and delivery of documents by the Housing Authority on its own behalf, in connection with the financing, development and operation of the Fultonia West/Cedar Heights project.

No public comment.

*Commissioner Bedrosian motioned for the City Board's approval of the omnibus resolution for Fultonia West and Cedar Heights. This action was seconded by Commissioner Johnson, and by unanimous vote of the Board of Commissioners for the City, the motion to approve the omnibus resolution for Fultonia West and Cedar Heights was approved.*

*Commissioner Nelson motioned for the County Board's approval the omnibus resolution for Fultonia West and Cedar Heights. This action was seconded by Commissioner Petty, and by unanimous vote of the Board of Commissioners for the County, the motion to approve the omnibus resolution for Fultonia West/Cedar Heights was approved.*

b. Trailside Terrace – Consideration of Entity Formation, Submission of Funding Application, and Award of Architectural Contract

Michael Duarte presented the attached resolutions recommending the Boards approve the resolutions needed to move forward with an LIHTC application submission. This action will also authorize the CEO/Executive Director, Deputy Director, and their designee, to negotiate and execute other documents related to Trailside Terrace.

Ken Price, General Counsel, defined omnibus resolution and announced this action was an omnibus resolution.

No public comment.

*Commissioner Johnson motioned for the City Board's approval of the entity formation, submission of funding application, and award of architectural contract for Trailside Terrace. This action was seconded by Commissioner Bedrosian, and by unanimous vote of the Board of Commissioners for the City, the motion to approve the items for Trailside Terrace was approved.*

*Commissioner Petty motioned for the County Board's approval of the entity formation, submission of funding application, and award of architectural contract for Trailside Terrace. This action was seconded by Commissioner Eager, and by unanimous vote of the Board of Commissioners for the County, the motion to approve the items for Trailside Terrace was approved.*

c. Firebaugh Gateway – Consideration of Entity Formation, Submission of Funding Application, and Funding Commitment

Michael Duarte presented resolutions recommending approval of the resolutions needed to move forward with an LIHTC application submission. This action will also authorize the CEO/Executive Director, Deputy Director, and their designee, to negotiate and execute other documents related to Firebaugh Gateway.

Ken Price, General Counsel, announced this action was an omnibus resolution.

No public comment.

*Commissioner Bedrosian motioned for the City Board's approval of the entity formation, submission of funding application, and funding commitment Firebaugh Gateway. This action was seconded by Commissioner Lowe, and by unanimous vote*

*of the Board of Commissioners for the City, the motion to approve these items for Firebaugh Gateway was approved.*

*Commissioner Anthony motioned for the County Board's approval of the entity formation, submission of funding application, and funding commitment for Firebaugh Gateway. This action was seconded by Commissioner Petty, and by unanimous vote of the Board of Commissioners for the County, the motion to approve these items for Firebaugh Gateway was approved.*

d. Edison Plaza I – Consideration of Entity Formation, Funding Commitment, and Submission of Funding Application

Michael Duarte presented resolutions recommending approval of the necessary actions needed to move forward with a Tax Credit application submission, and authorize the CEO/Executive Director, Deputy Director, and their designee, to negotiate and execute other documents in connection with these actions.

Ken Price, General Counsel, announced this action was an omnibus resolution.

No public comment.

*Commissioner Bedrosian motioned for the City Board's approval of the entity formation, funding commitment, and submission of funding application for Edison Plaza I. This action was seconded by Commissioner Jones, and by unanimous vote of the Board of Commissioners for the City, the motion to approve these items for Edison Plaza I was approved.*

*Commissioner Anthony motioned for the County Board's approval of the entity formation, funding commitment, and submission of funding application for Edison Plaza I. This action was seconded by Commissioner Petty, and by unanimous vote of the Board of Commissioners for the County, the motion to approve these items for Edison Plaza I was approved.*

e. Edison Plaza II – Consideration of Entity Formation

Michael Duarte recommended approval of the resolution for the Boards approval to consider the entity information of Edison Plaza II.

Scott Anderson, Penstar Group, spoke about the Edison Plaza partners and comments about the importance of partnership with this project.

Gregory Barfield, Chief of Staff of Councilmember Oliver Baines, spoke in favor of the Edison Plaza Project and shared encouraging words with Fresno Housing staff about the project.

*Commissioner Jones motioned for the City Board's approval of entity formation of Edison Plaza II. This action was seconded by Commissioner Bedrosian, and by*

*unanimous vote of the Board of Commissioners for the City, the motion to approve the entity formation for Edison Plaza II was approved.*

*Commissioner Petty motioned for the County Board's approval of the consideration of entity formation of Edison Plaza II. This action was seconded by Commissioner Eager, and by unanimous vote of the Board of Commissioners for the County, the motion to approve the entity formation for Edison Plaza II was approved.*

- f. City: Consideration of the Submission of the Section-Eight Management Assessment Program (SEMAP) Certification

Juan Lopez presented an overview of SEMAP. Following the presentation, Mr. Lopez recommended that the Boards adopt the attached resolution authorizing the CEO/Executive Director to submit the SEMAP certification to HUD by the deadline of March 1, 2015.

No public comment.

*Commissioner Jones motioned for the City Board's approval of the submission of the SEMAP certification. This action was seconded by Commissioner Johnson, and by unanimous vote of the Board of Commissioners for the City, the motion to approve the submission of the SEMAP certification was approved.*

- g. County: Consideration of the Submission of the Section-Eight Management Assessment Program (SEMAP) Certification

No public comment.

*Commissioner Anthony motioned for the County Board's approval of the submission of the SEMAP certification. This action was seconded by Commissioner Nelson, and by unanimous vote of the Board of Commissioners for the County, the motion to approve the submission of the SEMAP certification was approved.*

## 7. EXECUTIVE DIRECTOR'S REPORT

In addition to the written Director's report, the following items were announced:

- Brief overview of presentation at the Board of Supervisor's Meeting.
- Described the pamphlets and the mission of MAP Point.
- Summarized on the Grade Level Convening on February 18, 2015. Mr. Prince announced that Fresno is leading the conversation.
- The Steering Committee will meet on March 9, 2015 at 2 p.m. for the north end of the Fulton Mall site planning.

- Introduction of Michael Van Putten, Budget Analyst, to the Boards of Commissioners.

8. EXECUTIVE SESSION

At approximately 7:15 p.m., the Boards went into closed session announcing the following item for discussion:

a. CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION

(Pursuant to Government Code § 54956.9 (b), 1 case)

The Boards went in to open session at approximately 7:34 p.m. There was no reportable action or activity.

9. ADJOURNMENT

There being no further business to be considered by the Boards of Commissioners for the Housing Authorities of the City and County of Fresno, the meeting was adjourned at approximately 7:35 P.M.

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Preston Prince, Secretary to the Boards of Commissioners

# BOARD MEMO


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**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince   
CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 5b

**AUTHOR:** Richard Bradley

**SUBJECT:** Authorization to Charge-Off Uncollectible Accounts to Collection  
Losses for the 1<sup>st</sup> Qtr of 2015 for the City Housing Programs

## Executive Summary

Fresno Housing Authority fulfills its affirmative responsibility to try to collect delinquent debts that are owed to the Agency, until it becomes evident that a debt is "uncollectible". When that occurs we terminate collection action and write off the debt. The Housing Authority engages in active collection efforts, such as demand letters, repayment agreements, credit bureau reporting, garnishments obtained by Judgments at Small Claims Courts and referrals to HUD's Enterprise Income Verification System (EIV). EIV blocks former tenants from receiving future assistance until debts owed are paid.

An analysis of uncollectible accounts for the City Housing Management Programs for the First Quarter of 2015 is found below.

## Write-off's by Income Category

	TANF	SSI/SSA	TANF/SSI	EMP/UIB/ TANF/SSI	EMP/OT HER/UIB	TOTAL
2011	21	8	1	1	12	43
	49%	19%	2%	2%	28%	100%
2012	15	3	1	9	13	41
	37%	7%	2%	22%	32%	100%
2013	18	4	2	5	8	37
	49%	11%	5%	14%	22%	100%
2014	7	7	3	0	8	25
	28%	28%	12%	0%	32%	100%
2015	5	3	0	4	0	12
	42%	25%	0	33%	0	100%



**First Quarter Financial Impact:**

First Quarter Collection Losses for the City total \$8,604.05. Of this amount, \$8,476.21 will be charged to the Public Housing Program, \$0.00 will be charged to Mariposa Farm Labor Housing and \$127.84 will be charged to Garland Gardens.

**Recommendation**

It is recommended that the Board of Commissioners of the Housing Authority of the City of Fresno adopt the attached resolution authorizing charge-off of uncollectible accounts to collection losses for City Housing Programs, relative to the First Quarter of 2015.

RESOLUTION NO. \_\_\_\_\_

BEFORE THE BOARDS OF COMMISSIONERS OF THE  
HOUSING AUTHORITIES OF THE CITY AND COUNTY OF FRESNO

RESOLUTION AUTHORIZING CHARGE-OFF OF  
UNCOLLECTIBLE ACCOUNTS TO COLLECTION LOSSES  
FOR THE FIRST QUARTER 2015 FOR CITY HOUSING PROGRAMS

WHEREAS, the Housing Authority of the City of Fresno has made every reasonable effort to collect the delinquent accounts; and

WHEREAS, in accordance with established policy which provides that at the end of each quarterly period an examination shall be made by the project management of such delinquencies and that, after the Board of Commissioners of the Housing Authority of the City of Fresno has authorized charging uncollectible accounts to collection losses, such amount as determined uncollectible shall be charged to collection losses.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of the City of Fresno desires to comply with said policy and does hereby authorize charge-off to collection losses that total amount of \$8,604.05.

PASSED AND ADOPTED THIS 24<sup>TH</sup> DAY OF MARCH, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

**PART I - ANALYSIS OF CHARGES TO ALL TENANT ACCOUNTS:**

TYPE OF CHARGES	LOW INC. PUB.HSG.	GARLAND GARDENS
	AMOUNT	AMOUNT
Dwelling Rent-Qrtly	242,866.95	29,691.00
Other Charges-Qrtly	0.00	0.00
Total Charges	<u>242,866.95</u>	<u>29,691.00</u>

**PART II - COMPOSITION OF UNCOLLECTIBLE WRITE-OFFS:**

TYPE OF CHARGES	LOW INCOME PUBLIC HSG.		GARLAND GARDENS	
	AMOUNT	PERCENT	AMOUNT	PERCENT
Dwelling Rent	3,760.82	44.37%	\$127.84	100.00%
Legal Action	3,257.25	38.43%	0.00	0.00%
Miscellaneous Charges	1,458.14	17.20%	0.00	0.00%
<i>Total Uncollectible</i>	<u>8,476.21</u>	<u>100.00%</u>	<u>127.84</u>	<u>100.00%</u>

**PART III - COMPARISON OF NEW COLLECTION LOSSES TO PREVIOUS YEARS AND CURRENT YEAR-TO-DATE:**

	<u>Total Uncollectible</u>	<u>Amount of Loss</u>	<u>Recovered Losses</u>	<u>Percent of Dwelling Rent</u>	<u>Per Unit Per Month</u>
<b>LOW INC. PUB. HSG.</b>					
Calendar Year 2008	14,167.64	13,626.60	541.04	0.70%	1.57
Calendar Year 2009	50,923.98	49,833.39	1,090.59	2.60%	6.07
Calendar Year 2010	14,196.45	12,299.60	1,896.85	0.78%	1.65
Calendar Year 2011	36,587.96	34,603.26	1,984.70	2.19%	4.15
Calendar Year 2012	38,715.61	35,670.03	3,045.58	9.71%	16.38
Calendar Year 2013	36,759.84	34,954.34	1,805.50	9.53%	15.55
Calendar Year 2014	25,504.38	25,504.38	0.00	2.09%	4.91
First Quarter 2015	8,476.21	8,463.62	12.59	3.49%	6.53
<b>GARLAND GARDENS</b>					
Calendar Year 2008	828.63	828.63	0.00	0.70%	1.38
Calendar Year 2009	422.05	422.05	0.00	0.70%	1.41
Calendar Year 2010	2,523.05	2,523.05	0.00	4.37%	4.21
Calendar Year 2011	4,791.97	4,067.77	724.20	5.28%	7.99
Calendar Year 2012	5,955.68	5,955.68	0.00	21.74%	39.70
Calendar Year 2013	2,634.35	2,634.35	0.00	7.12%	17.56
Calendar Year 2014	23.74	23.74	0.00	0.00%	0.04
First Quarter 2015	127.84	127.84	0.00	0.43%	0.85
<b>MARIPOSA - FLH</b>					
Calendar Year 2008	2,806.97	2,806.97	0.00	6.10%	23.40
Calendar Year 2009	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2010	1,262.50	1,262.50	0.00	3.60%	2.63
Calendar Year 2011	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2012	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2013	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2014	0.00	0.00	0.00	0.00%	0.00
First Quarter 2015	0.00	0.00	0.00	0.00%	0.00

**CHARGE-OFF UNCOLLECTIBLE  
ACCOUNTS RECEIVABLE  
FIRST QUARTER 2015**

**CITY HOUSING PROGRAMS:**

AMP 1	\$ 2,257.32
AMP 2	<u>\$ 6,218.89</u>
<b>TOTAL LOW INCOME PUBLIC HOUSING</b>	<u>\$ 8,476.21</u>
 <b>GARLAND GARDENS</b>	 \$ 127.84
<b>MARIPOSA FARM LABOR</b>	<u>\$ -</u>
<b>TOTAL CITY WRITE-OFFS</b>	<u><u>\$ 8,604.05</u></u>

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**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince

CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 5c

**AUTHOR:** Richard Bradley

**SUBJECT:** Authorization to Charge-Off Uncollectible Accounts to Collection

Losses for the 1<sup>st</sup> Qtr of 2015 for the County Housing Programs

## Executive Summary

Fresno Housing Authority fulfills its affirmative responsibility to try to collect delinquent debts that are owed to the Agency, until it becomes evident that a debt is "uncollectible". When that occurs we terminate collection action and write off the debt. The Housing Authority engages in active collection efforts, such as demand letters, repayment agreements, credit bureau reporting, garnishments obtained by Judgments at Small Claims Courts and referrals to HUD's Enterprise Income Verification System (EIV). EIV blocks former tenants from receiving future assistance until debts owed are paid.

An analysis of uncollectible accounts for the County Housing Management Programs for the First Quarter of 2015 is found below.

## Write-off's by Income Category

	TANF	SSI/SSA	TANF/SSI	EMP/UIB/ TANF/SSI	EMP/OT HER/UIB	TOTAL
2011	7	2	1	8	11	29
	24%	7%	3%	28%	38%	100%
2012	14	4	1	12	12	43
	33%	9%	2%	28%	28%	100%
2013	19	4	3	12	20	58
	33%	7%	5%	21%	34%	100%
2014	15	1	2	9	9	36
	41%	3%	6%	25%	25%	100%
2015	3	1	0	2	8	14
	21%	7%	0	14%	58%	100%

**First Quarter Financial Impact:**

First Quarter Collection Losses for the City total \$16,093.12. Of this amount, \$12,165.16 will be charged to the Public Housing Program, \$2,766.43 will be charged to the Farm Labor Housing Program, \$0.00 to the Firebaugh Family Apts, \$6.03 to the CalHFA Program and \$1,155.50 will be charged to Migrant Program.

**Recommendation**

It is recommended that the Board of Commissioners of the Housing Authority of the County of Fresno adopt the attached resolution authorizing charge-off of uncollectible accounts to collection losses for County Housing Programs, relative to the First Quarter of 2015.



**RESOLUTION NO. \_\_\_\_\_**  
**BEFORE THE BOARDS OF COMMISSIONERS OF THE**  
**HOUSING AUTHORITIES OF THE CITY AND COUNTY OF FRESNO**  
**RESOLUTION AUTHORIZING CHARGE-OFF OF**  
**UNCOLLECTIBLE ACCOUNTS TO COLLETION LOSSES**  
**FOR THE FIRST QUARTER 2015 FOR COUNTY HOUSING PROGRAMS**

WHEREAS, the Housing Authority of Fresno County has made every reasonable effort to collect the delinquent accounts; and

WHEREAS, in accordance with established policy which provides that at the end of each quarterly period an examination shall be made by the project management of such delinquencies and that, after the Board of Commissioners of the Housing Authority of Fresno County has authorized charging uncollectible accounts to collection losses, such amount as determined uncollectible shall be charged to collection losses.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of Fresno County desires to comply with said policy and does hereby authorize charge-off to collection losses that total amount of \$16,093.12.

PASSED AND ADOPTED THIS 24TH DAY OF MARCH, 2015. I, the undersigned, herby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

**PART I - ANALYSIS OF CHARGES TO ALL TENANT ACCOUNTS:**

	LOW INC. PUB.HSG. AMPS 1 - 6 AMOUNT	PARLIER FARM LABOR AMOUNT	MENDOTA FARM LABOR AMOUNT	MIGRANT PARLIER AMOUNT	PARKSIDE AMOUNT
TYPE OF CHARGES					
Dwelling Rent-Qrtly	585,816.00	52,735.50	86,113.50	0.00	46,527.00
Other Charges-Qrtly	0.00	0.00	0.00	0.00	0.00
NET RENT	585,816.00	52,735.50	86,113.50	0.00	46,527.00

**PART II - COMPOSITION OF UNCOLLECTIBLE WRITE-OFFS:**

	LOW INCOME PUBLIC HSG.		PARLIER FARM LABOR		MENDOTA FARM LABOR		MIGRANT PARLIER		PARKSIDE	
TYPE OF CHARGES	AMOUNT	PERCENT	AMOUNT	PERCENT	AMOUNT	PERCENT	AMOUNT	PERCENT	AMOUNT	PERCENT
Dwelling Rent	6,861.56	56.40%	207.45	97.65%	2,533.98	99.22%	965.50	83.56%	0.00	0.00%
Legal Action	2,779.69	22.85%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%
Miscellaneous Charges	2,523.91	20.75%	5.00	2.35%	20.00	0.78%	190.00	16.44%	6.03	100.00%
<i>Total Uncollectible</i>	12,165.16	100.00%	212.45	100.00%	2,553.98	100.00%	1,155.50	100.00%	6.03	100.00%

**PART III - COMPARISON OF NEW COLLECTION LOSSES TO PREVIOUS YEARS AND CURRENT YEAR-TO-DATE**

	<u>Total Uncollectible</u>	<u>Amount of Loss</u>	<u>Recovered Losses</u>	<u>Percent of Dwelling Rent</u>	<u>Per Unit Per Month</u>
<b>LOW INC. PUB. HSG.</b>					
Calendar Year 2009	47,448.54	46,056.18	1,392.36	1.60%	4.10
Calendar Year 2010	23,884.68	23,450.68	434.00	0.75%	2.06
Calendar Year 2011	31,345.37	28,131.08	3,214.29	1.04%	2.68
Calendar Year 2012	42,440.06	42,172.68	267.38	5.69%	14.54
Calendar Year 2013	52,934.08	49,225.72	3,708.36	7.03%	18.13
Calendar Year 2014	27,814.43	27,814.43	0.00	1.08%	3.09
First Quarter 2015	12,165.16	10,900.02	1,265.14	2.08%	5.41
<b>CITRUS GARDENS FARM LABOR</b>					
Calendar Year 2009	422.58	422.58	0.00	1.00%	2.35
Calendar Year 2010	1,551.13	1,551.13	0.00	4.14%	4.31
Calendar Year 2011	2,631.21	2,631.21	0.00	8.73%	7.31
Calendar Year 2012	2,391.30	2,391.30	0.00	8.76%	26.57
Calendar Year 2013	1,590.61	1,590.61	0.00	6.96%	17.67
Calendar Year 2014	0.00	0.00	0.00	0.00%	0.00
First Quarter 2015	0.00	0.00	0.00	0.00%	0.00
<b>MENDOTA FARM LABOR</b>					
Calendar Year 2009	1,051.38	1,051.38	0.00	1.40%	5.84
Calendar Year 2010	747.19	747.19	0.00	0.90%	1.04
Calendar Year 2011	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2012	532.40	532.40	0.00	0.50%	2.96
Calendar Year 2013	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2014	0.00	0.00	0.00	0.00%	0.00
First Quarter 2015	2,553.98	2,553.98	0.00	2.97%	14.19
<b>PARLIER FARM LABOR</b>					
Calendar Year 2009	30.06	30.06	0.00	0.10%	0.25
Calendar Year 2010	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2011	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2012	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2013	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2014	1,614.34	1,614.34	0.00	0.76%	3.36
First Quarter 2015	212.45	212.30	0.15	0.40%	1.77
<b>FIREBAUGH FAMILY APARTMENTS</b>					
Calendar Year 2009	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2010	434.75	434.75	0.00	1.00%	1.07
Calendar Year 2011	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2012	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2013	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2014	95.87	95.87	0.00	0.05%	0.23
First Quarter 2015	0.00	0.00	0.00	0.00%	0.00
<b>PARKSIDE</b>					
Calendar Year 2009	1,846.38	1,846.38	0.00	1.90%	6.16
Calendar Year 2010	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2011	0.00	0.00	0.00	0.00%	0.00
Calendar Year 2012	794.00	794.00	0.00	1.83%	5.29
Calendar Year 2013	4,660.94	4,660.94	0.00	10.08%	31.07
Calendar Year 2014	566.73	566.73	0.00	0.32%	0.94
First Quarter 2015	6.03	6.03	0.00	0.01%	0.04
<b>MALDONADO MIGRANT</b>					
Calendar Year 2013	867.00	867.00	0.00	0.04%	4.52
Calendar Year 2014	0.00	0.00	0.00	0.00%	0.00
First Quarter 2015	0.00	0.00	0.00	0.00%	0.00
<b>PARLIER MIGRANT</b>					
Calendar Year 2013	1,128.00	1,128.00	0.00	0.03%	2.85
Calendar Year 2014	1,016.00	1,016.00	0.00	0.26%	0.64
First Quarter 2015	1,155.50	930.50	225.00	0.00%	2.92

**CHARGE-OFF UNCOLLECTIBLE  
ACCOUNTS RECEIVABLE  
FIRST QUARTER 2015**

**COUNTY HOUSING PROGRAMS:**

AMP 1	\$ 6,577.48
AMP 2	\$ 3,478.11
AMP 3	\$ -
AMP 4	\$ -
AMP 5	\$ 2,109.57
AMP 6	<u>\$ -</u>
<b>TOTAL LOW INCOME PUBLIC HOUSING</b>	<u><b>\$12,165.16</b></u>
<b>FIREBAUGH FAMILY APARTMENTS</b>	\$ -
<b>PARKSIDE CHFA</b>	\$ 6.03
<b>PARLIER FARM LABOR</b>	\$ 212.45
<b>MENDOTA FARM LABOR</b>	\$ 2,553.98
<b>MALDONADO MIGRANT</b>	\$ -
<b>PARLIER MIGRANT</b>	<u>\$ 1,155.50</u>
<b>TOTAL COUNTY WRITE-OFFS</b>	<u><u><b>\$16,093.12</b></u></u>

## BOARD MEMO

O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 5d

**AUTHOR:** Clayton E. Lucas II

**SUBJECT:** Conflict of Interest Code

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### Executive Summary

On October 8, 2014, the office of the Clerk to the County Board of Supervisors ("the Office") requested changes to the Conflict of Interest Code submitted by the Agency per direction from their counsel. The Agency, in compliance with this request, applied those changes to the conflict of interest code, which was passed by the Agency Boards at the regular joint board meeting on September 24, 2014.

On March 5, 2015 the Office notified Fresno Housing that the request made on October 8, 2014 requesting changes to the Conflict of Interest Code was made in error (See attached letter). The Office has requested the Agency retract the changes applied to the Conflict of Interest Code in September, 2014, which have been highlighted in the Conflict of Interest Code.

### Recommendation

It is recommended that the Boards of Commissioners approve and adopt the attached resolutions authorizing incorporation by reference the Conflict of Interest Code as adopted by the Fair Political Practices Commission and removing the highlighted language.

### Fiscal Impact

None.

### Background

The Political Reform Act (Government Code 8100, et seq.) requires state and local government agencies to adopt and promulgate conflict of interest codes every two years. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code of Regs. Section 18730) that contains the terms of a standard conflict of interest code and may be incorporated by reference in an agency's code. After public notice and hearing, the standard code may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act.

The purpose of a conflict of interest code is to identify and prevent potential financial conflicts between the official conduct of public officials and employees and their personal financial interests. This code establishes disclosure requirements only for specific positions designated by the Conflict of Interest Code Appendices, which have been updated within the new proposed Code.

**RESOLUTION No. \_\_\_\_\_**

**BEFORE THE BOARD OF COMMISSIONERS OF THE  
HOUSING AUTHORITY OF THE CITY OF FRESNO**

**APPROVAL OF REVISED CONFLICT OF INTEREST CODE**

WHEREAS, the Political Reform Act, Government Code Section 8100, *et seq.*, requires State and local government agencies to adopt and promulgate conflict of interest codes; and

WHEREAS, the Fair Political Practice Commission has adopted a regulation, 2 California Code of Regulations, Section 18730, which contains the terms of a standard model Conflict of Interest Code and may be incorporated by reference, and which may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act after public notice and hearings.

NOW, THEREFORE, BE IT RESOLVED, the terms of 2 California Code of Regulations Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission, along with the attached Conflict of Interest Code and Appendices, in which Commissioners, employees, legal counsel, and consultants are designated and disclosure categories are set forth, are hereby incorporated by reference and constitute the Conflict of Interest Code of the Housing Authority of the City of Fresno.

PASSED AND ADOPTED THIS 24<sup>th</sup> day of March, 2015, by the following vote, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Board of Commissioners



**RESOLUTION No. \_\_\_\_\_**

**BEFORE THE BOARD OF COMMISSIONERS OF THE  
HOUSING AUTHORITY OF FRESNO COUNTY**

**APPROVAL OF REVISED CONFLICT OF INTEREST CODE**

WHEREAS, the Political Reform Act, Government Code Section 8100, *et seq.*, requires State and local government agencies to adopt and promulgate conflict of interest codes; and

WHEREAS, the Fair Political Practice Commission has adopted a regulation, 2 California Code of Regulations, Section 18730, which contains the terms of a standard model Conflict of Interest Code and may be incorporated by reference, and which may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act after public notice and hearings.

NOW, THEREFORE, BE IT RESOLVED, the terms of 2 California Code of Regulations Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission, along with the attached Conflict of Interest Code and Appendices, in which Commissioners, employees, legal counsel, and consultants are designated and disclosure categories are set forth, are hereby incorporated by reference and constitute the Conflict of Interest Code of the Housing Authority of Fresno County.

PASSED AND ADOPTED THIS 24<sup>th</sup> day of March, 2015, by the following vote, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Board of Commissioners

## CONFLICT-OF-INTEREST CODE FOR HOUSING AUTHORITIES, CITY AND COUNTY OF FRESNO

The Political Reform Act (Government Code Section 81000, et seq.) requires state and local government agencies to adopt and promulgate conflict-of-interest codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code of Regs. Section 18730) that contains the terms of a standard conflict-of-interest code and may be incorporated by reference in an agency's code. After public notice and hearing, the standard code may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act. Therefore, the terms of California Code of Regulations, Title 2, Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission are hereby incorporated by reference. This regulation and the attached Appendices designating positions and establishing disclosure requirements shall constitute the conflict-of-interest code of the **Housing Authorities, City and County of Fresno (the "Agency")**.

Individuals holding designated positions shall file their statements with the Agency, which will retain the statements and make the statements available for public inspection and reproduction. (Gov. Code Section 81008.) Upon receipt of the statements for the Board Members and the Chief Executive Officer/Executive Director, *Chief Financial Officer/Deputy Director, Director of Finance, and any consultants involved in the investment of public funds*, the Agency shall make and retain a copy and forward the original of these statements to the Clerk to the County Board of Supervisors. The Agency shall retain the originals of all other statements at its office.

The provisions of all Conflict of Interest Codes and amendments thereto  
previously adopted by the Agency are hereby superseded.

## APPENDIX A PUBLIC OFFICIALS WHO MANAGE PUBLIC INVESTMENTS

It has been determined that positions listed below manage public investments and will file a statement of economic interests pursuant to Government Code Section 87200. These positions are listed for informational purposes only:

- Members of the Boards of Commissioners and alternative board members
- Chief Executive Officer/Executive Director
- Chief Financial Officer/Deputy Director
- Director of Finance
- Consultants involved in the investment of public funds

An individual holding one of the above-listed positions may contact the Fair Political Practices Commission for assistance or written advice regarding their filing obligations if they believe that their position has been categorized incorrectly. The Fair Political Practices Commission makes the final determination whether a position is covered by Government Code Section 87200.

## APPENDIX B DESIGNATED POSITIONS

<u>Designated Positions</u>	<u>Disclosure Categories</u>
General Counsel	1
Chief Operations Officer	2, 3
Chief Administrative Officer	2, 3, 5, 6
Any other Chief, Officer, Director or Manager	2, 3
Director of Housing Management	2, 3
Director of Administration	2, 3, 5, 6
Manager of Resident Services	2, 3
Assistant Director of Housing Programs	2, 3
Finance Manager	1
Human Resources Manager	4, 5
Accounting Manager	2, 3
Assisted Housing Manager	2, 3
Property Manager	2, 3
District Manager	2, 3
Communications Manager	2, 3
Construction Project Manager	2, 3
Financial Analyst	1
Administrative Services Analyst	2, 3, 5, 6
All Planning & Community Development employees above Administrative Assistant	2, 3
Procurement Coordinator	2, 3, 5, 6
• Consultants*	1

\* Consultants shall be included in the list of designated positions and shall disclose pursuant to the disclosure requirements in this code subject to the following limitation:

The Executive Director may determine in writing that a particular consultant, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to comply fully with the disclosure requirements in this section. Such written determination shall include a description of the consultant’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Executive Director’s determination is a public record and shall be retained for public inspection in the same manner and location as this conflict-of-interest code. (Gov. Code Sec. 81008.)

## APPENDIX C DISCLOSURE CATEGORIES

Individuals holding designated positions must report their interests according to their assigned disclosure category(ies).

### Disclosure Category 1

Interests in real property located within the jurisdiction or within two miles of the boundaries of the jurisdiction or within two miles of any land owned or used by the agency; and investments and business positions in business entities, and income, including loans, gifts, and travel payments, from all sources.

### Disclosure Category 2

Interests in real property located within the jurisdiction or within two miles of the boundaries of the jurisdiction or within two miles of any land owned or used by the agency.

### Disclosure Category 3

Investments and business positions in business entities, and income, including loans, gifts, and travel payments, from sources, that provide services, supplies, materials, machinery, or equipment of the type utilized by the agency.

### Disclosure Category 4

Investments and business positions in business entities, and income, including loans, gifts, and travel payments, from sources, that provide services, supplies, materials, machinery, or equipment of the type utilized by the designated position's division or department.

### Disclosure Category 5

Investments and business positions in business entities, and income, including loans, gifts, and travel payments, from sources, that filed a claim against the agency during the previous two years, or have a claim pending.

### Disclosure Category 6

Investments and business positions in business entities, and income, including loans, gifts, and travel payments, from sources of the type to request an entitlement to use agency property or facilities, including, but not limited to:

- a license
- utility permit
- station vendor permit.

## BOARD MEMO

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**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 5e

**AUTHOR:** Clayton E. Lucas II

**SUBJECT:** Payroll Taxes and Other Deductions from Pay Policy

---

### Executive Summary

It is the policy of the Fresno Housing Authority (the "Agency") to ensure that the Agency is in compliance with all applicable state and federal laws that regulate the establishment and operation of Public Housing Authorities, and to ensure that all employees at the Agency are informed of the mandatory laws and regulations that the Agency is required to follow.

In an effort to follow Agency policy and to maintain strict compliance with the Fair Labor Standards Act ("FLSA") and applicable wage and hour laws, Staff is proposing the Boards of Commissioners to adopt the attached new policy on Payroll Taxes and Other Deductions from Pay. The purpose of this policy is to demonstrate what types of salary deductions are administered by Agency policy and by law, what types of deductions are classified as voluntary or involuntary, and what the proper reporting process will be for employee concerns regarding pay. This policy provides employees with detailed information in regards to mandatory (e.g., income tax withholdings), voluntary (e.g., payroll deductions for employee benefits), and involuntary (e.g., child support payments) payroll deductions. The Agency will follow all applicable laws related to deductions from an employee's wages and, when required, the employee's consent.

The Payroll Taxes and Other Deductions from Pay Policy is a new policy that has been developed based on industry best practices and upon the recommendation of our Human Resources legal counsel as part of our ongoing review and update of Agency policies.

### Recommendation

It is recommended that the Boards of Commissioners approve and adopt the attached Payroll Taxes and Other Deductions from Pay policy.

### Fiscal Impact

None.

**RESOLUTION NO.**  
**BEFORE THE BOARD OF COMMISSIONERS OF THE**  
**HOUSING AUTHORITY OF THE CITY OF FRESNO**

**RESOLUTION APPROVING THE ADOPTION OF THE PAYROLL TAXES AND OTHER  
DEDUCTIONS FROM PAY POLICY**

WHEREAS, it is the policy of the Fresno Housing Authority (the “Agency”) to make sure that the Agency is in compliance with all applicable state and federal laws that regulate the establishment and operation of Public Housing Authorities, and to ensure that all employees at the Agency are informed of the mandatory laws and regulations that the Agency is required to follow; and

WHEREAS, the Agency, in compliance with the Fair Labor Standards Act (“FLSA”) and applicable wage and hour laws, and upon the recommendation of the Human Resources legal counsel, is proposing a new policy on Payroll Taxes and Other Deductions from Pay which demonstrates what types of salary deductions are administered by Agency policy and by law, what types of deductions are classified as voluntary or involuntary, and what the proper reporting process will be for employee concerns regarding pay; and

WHEREAS, the proposed Payroll Taxes and Other Deductions from Pay Policy is a necessary policy under the applicable state and federal laws that govern the operation of the Agency;

NOW THEREFORE, BE IT RESOLVED THAT the Board of Commissioners of the Housing Authority of the City of Fresno does hereby adopt and incorporate the proposed policy.

PASSED AND ADOPTED THIS 24<sup>th</sup> day of March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners



**RESOLUTION NO.**  
**BEFORE THE BOARD OF COMMISSIONERS OF THE**  
**HOUSING AUTHORITY OF FRESNO COUNTY**

**RESOLUTION APPROVING THE ADOPTION OF THE PAYROLL TAXES AND OTHER  
DEDUCTIONS FROM PAY POLICY**

WHEREAS, it is the policy of the Fresno Housing Authority (the “Agency”) to make sure that the Agency is in compliance with all applicable state and federal laws that regulate the establishment and operation of Public Housing Authorities, and to ensure that all employees at the Agency are informed of the mandatory laws and regulations that the Agency is required to follow; and

WHEREAS, the Agency, in compliance with the Fair Labor Standards Act (“FLSA”) and applicable wage and hour laws, and upon the recommendation of the Human Resources legal counsel, is proposing a new policy on Payroll Taxes and Other Deductions from Pay which demonstrates what types of salary deductions are administered by Agency policy and by law, what types of deductions are classified as voluntary or involuntary, and what the proper reporting process will be for employee concerns regarding pay; and

WHEREAS, the proposed Payroll Taxes and Other Deductions from Pay Policy is a necessary policy under the applicable state and federal laws that govern the operation of the Agency;

NOW THEREFORE, BE IT RESOLVED THAT the Board of Commissioners of the Housing Authority of Fresno County does hereby adopt and incorporate the proposed policy.

PASSED AND ADOPTED THIS 24<sup>th</sup> day of March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

## Payroll Taxes and Other Deductions from Pay Policy

### Introduction

The Fresno Housing Authority (the “Agency”) strives to maintain strict compliance with the Fair Labor Standards Act (FLSA) and applicable wage and hour laws. The Agency will follow all applicable laws related to deductions from an employee’s wages and, when required, the employee’s consent.

### Purpose

The purpose of this policy is to demonstrate what types of salary deductions are administered by Agency policy and by law. Deductions are classified as voluntary or involuntary.

### Policy

It is the Agency’s policy not to make deductions from wages other than those expressly authorized by federal or state regulation or law (or by the employee). An employee who believes there has been any improper deduction must immediately report the matter to the Payroll Department. Employee concerns will be investigated and, if it is determined that there has been any error, proper adjustments will be made. Employees will not be subjected to retaliation for raising any questions or concerns regarding any payroll deduction.

### Definitions

*W-4 Form* - The Federal tax form which sets appropriate tax levels for each individual employee. Employees must complete and sign this form to receive their paycheck.

*DE-4 Form* - The State of California tax form which sets appropriate tax levels for each individual employee. Employees must complete and sign this form to receive their paycheck.

### Mandatory Payroll Deductions

Federal and State laws require that the Agency withhold a variety of taxes from employee wages including the following: Social Security (FICA), Medicare (FICA), State and Federal Income tax and State Disability Insurance (SDI). Some of these amounts are based on specific deductions as required by law; others are based on tax withholding forms (W-4 or DE-4) submitted by employees, which is also required. Further, employees enrolled in the CalPERS retirement system are subject to deductions related to employee contributions (which may vary depending on employee hire date).

### Income Tax Withholdings

The Payroll Department is responsible for managing employee income tax withholdings through the Human Resources system. The Department cannot give tax advice to any employee. If employees need tax assistance, they should contact the Internal Revenue Service (IRS) or seek their own tax or legal counsel. If an employee does not complete their tax forms or update them as needed, the Payroll Department, following IRS guidelines, must default the taxing to the maximum withholding amount.

W-4 and DE-4 amounts revert to single with no allowances 150 days after an employee's termination date. Agency employees rehired 150 days since their last day worked will need to complete new forms to ensure proper tax withholding.

*New Hires* - Newly hired employees must complete a W-4 and DE-4 by their first day of employment. They should return the completed forms to the Human Resources Department. The department must forward the tax forms to the Payroll Department. If no form is received, the Payroll Department, following IRS guidelines, must default the taxing to the maximum withholding amount: single with no exemptions.

New employees will be given these forms for completion during their Benefits Orientation Meeting.

*Changing Tax Information* - If employees want to change their withholding, they must complete a new W-4 and DE-4 and return it to the Payroll Department. W-4 changes may be done online through the Human Resources system during any time of the year.

*Exemption from Withholding* - Employees can claim exemption from income tax withholding if they meet IRS guidelines. Information on claiming exemption from withholding can be found on the W-4 and DE-4 form. By claiming this exempt status, no federal or state taxes will be withheld. Consult the IRS website for complete guidelines on exceptions.

*Mandatory Renewal of Exemption from Withholding* - Exempt status expires at the end of the calendar year. Therefore, each calendar year, employees must file new tax forms to claim the exempt status. A new W-4 must be filed before February 15 in order to maintain an exempt status for the upcoming calendar year.

If, after filing a W-4 claiming exempt from withholding, the employee realizes he or she will incur tax liability for the current year, the employee has ten days from that point to file an amended W-4.

If an employee's exempt status is not renewed, the Agency must begin withholding income taxes at the default maximum withholding amount. (Currently, single with no exemptions.) If an employee fails to claim exemption from income tax withholding, and income taxes are withheld as a result, the Payroll Department WILL NOT refund any of the taxes withheld. The employee may obtain a refund of any withheld income taxes when filing his or her annual income tax return.

*Over-Withheld Income Taxes* - As an employer, the Agency is required to withhold income taxes from an employee's paycheck according to the employee's W-4 and DE-4. It is the employee's responsibility to complete these tax forms and to do so correctly. If an employee fails to complete the forms, and if income taxes are over-withheld as a result, the Payroll Department WILL NOT refund any of the taxes withheld.

The employee may obtain a refund of any over-withheld income taxes when filing his or her annual income tax return.

### **Voluntary Payroll Deductions**

In addition to the above-stated mandatory payroll deductions, the Payroll Department also facilitates certain voluntary payroll deductions.

*Payroll Deductions for Employee Benefits* - The Human Resources Department is responsible for determining employee eligibility and enrollment of retirement, life, disability, and health care benefits. Any changes or questions concerning benefit coverage and coverage during a leave of absence and their resulting payroll deductions should be directed to the Human Resources Department.

*Other Deductions* - Full-time non-exempt and exempt employees may be eligible for various other voluntary payroll deductions (for example, deductions relating to the Agency's Flexible Spending Account Program or contributions to a deferred compensation account). If you have any questions about other voluntary payroll deductions that may be available, please contact the Payroll Department

### **Deductions for Union Dues**

For those Agency employees who are included within the bargaining group (SEIU), the Payroll Department will deduct from all represented employees' payroll checks the applicable dues owed to the Union in accordance with the current Memorandum of Understanding between the Agency and the Union.

### **Involuntary Payroll Deductions**

The Payroll Department, upon receipt of legal documentation, is required by law to withhold monies from an employee's wages to satisfy certain debts.

Examples of involuntary deductions are garnishments, bankruptcies, tax levies, wage assignments, or child support payments. The Payroll Department will notify an employee by letter of a debt withholding notice it has received. Employees should also receive prior notification by the issuing court or authorized agency.

The Payroll Department is legally bound to withhold or garnish an employee's wages as instructed by the court, and in accordance with the law.

### **Responsibility**

Each and every employee, officer, and commissioner is required to abide by the provisions set forth in this policy. The Executive Director or his/her designee is responsible for the administration, interpretation, and application of this policy and procedure. The Boards of Commissioners are responsible for policy adoptions and revisions.

## BOARD MEMO

O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 5f

**AUTHOR:** Clayton E. Lucas II

**SUBJECT:** Pay Period Policy

---

### Executive Summary

It is the policy of the Fresno Housing Authority (the "Agency") to ensure that the Agency is in compliance with all applicable state and federal laws that regulate the establishment and operation of Public Housing Authorities, and to ensure that all employees at the Agency are informed of the procedures that the Agency is required to follow.

In an effort to follow Agency policy and to ensure all Agency employees are informed of pay period details, Staff is proposing the Boards of Commissioners to adopt the attached new policy on the Pay Period. The purpose of this policy is to inform employees of the biweekly pay period schedule, to explain the connection between workweeks and corresponding paychecks, and to provide instructions for reporting mistakes on paychecks.

The Pay Period Policy is a new policy that has been developed based on industry best practices and upon the recommendation of our Human Resources legal counsel as part of our ongoing review and update of Agency policies.

### Recommendation

It is recommended that the Boards of Commissioners approve and adopt the attached Pay Period Policy.

### Fiscal Impact

None.

**RESOLUTION NO.**  
**BEFORE THE BOARD OF COMMISSIONERS OF THE**  
**HOUSING AUTHORITY OF THE CITY OF FRESNO**

**RESOLUTION APPROVING THE ADOPTION OF THE PAY PERIOD POLICY**

WHEREAS, it is the policy of the Fresno Housing Authority (the “Agency”) to make sure that the Agency is in compliance with all applicable state and federal laws that regulate the establishment and operation of Public Housing Authorities, and to ensure that all employees at the Agency are informed of the procedures that the Agency is required to follow; and

WHEREAS, the Agency, upon the recommendation of the Human Resources legal counsel, is proposing a Pay Period Policy that ensures all employees are informed of pay period details such as the biweekly pay period schedule, the connection between workweeks and paychecks, and the instructions for reporting mistakes on paychecks; and

WHEREAS, the proposed Pay Period Policy is a necessary policy under the applicable state and federal laws that govern the operation of the Agency;

NOW THEREFORE, BE IT RESOLVED THAT the Board of Commissioners of the Housing Authority of the City of Fresno does hereby adopt and incorporate the proposed policy.

PASSED AND ADOPTED THIS 24<sup>th</sup> day of March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

**RESOLUTION NO.**  
**BEFORE THE BOARD OF COMMISSIONERS OF THE**  
**HOUSING AUTHORITY OF FRESNO COUNTY**

**RESOLUTION APPROVING THE ADOPTION OF THE PAY PERIOD POLICY**

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WHEREAS, the Agency, upon the recommendation of the Human Resources legal counsel, is proposing a Pay Period Policy that ensures all employees are informed of pay period details such as the biweekly pay period schedule, the connection between workweeks and paychecks, and the instructions for reporting mistakes on paychecks; and

WHEREAS, the proposed Pay Period Policy is a necessary policy under the applicable state and federal laws that govern the operation of the Agency;

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PASSED AND ADOPTED THIS 24<sup>th</sup> day of March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

## **Pay Period Policy**

### **Introduction**

The Fresno Housing Authority (the “Agency”) pays employees on a regular basis, so that the amount, method, and timing of such payments comply with applicable state laws and regulations.

### **Purpose**

The Agency pays all employees on a biweekly schedule, and generally through direct deposit. The Agency strives to pay employees accurately.

### **Policy**

Employees are paid biweekly, every other Friday, for the preceding two consecutive workweeks. Each paycheck includes pay for all work performed through the end of the previous payroll period. In the event that a payday falls on a holiday, the payday will be the work day prior to the holiday.

Arrangements may be made to have paychecks directly deposited into a savings or checking account at a local bank. These arrangements may be made through the Human Resources Department. Employees are strongly encouraged to elect direct deposit as a method of payment.

Employees are responsible for reviewing their paychecks for accuracy. If employees find a mistake, it is their responsibility to notify the Payroll Department immediately in order to quickly correct the error.

### **Responsibility**

Each and every employee, officer, and commissioner is required to abide by the provisions set forth in this policy. The Executive Director or his/her designee is responsible for the administration, interpretation, and application of this policy and procedure. The Boards of Commissioners are responsible for policy adoptions and revisions.



## BOARD MEMO

O (559) 443-8400  
 F (559) 445-8981

1331 Fulton Mall  
 Fresno, California 93721  
 TTY (800) 735-2929

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**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince

CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 5g

**AUTHOR:** Richard Bradley

**SUBJECT:** Mixed Finance and Internal Revenue Code Section 42 Utility Allowance Schedules

### Executive Summary

This memo provides the annual update to the Utility Allowance (UA) schedules for Low Income Housing Tax Credit (LIHTC) developments and site specific mixed finance LIHTC properties that include Low Income Public Housing (LIPH) and/or Project Based Vouchers (Section 8) . The UA schedules will be made available to developers, including the Fresno Housing Authority (FH), of LIHTC properties throughout Fresno County. The California Tax Credit Allocation Committee (CTCAC) has provided guidance to LIHTC developers for estimates of utility allowances to refer to the local public housing authority or an energy consumption model estimate calculated using the most recent version of the California Utility Allowance Calculator developed by the California Energy Commission. Accordingly, The Fresno Housing Authority provides the schedules annually, and they are adopted by the Boards of Commissioners.

The average monthly consumption estimates for electricity and natural gas were developed by the Nelrod Company utilizing HUD's Utility Schedule Model (HUSM). This model enables the user to calculate utility schedules by housing type after inputting utility rate information. The Internal Revenue Service (IRS) uses this model to determine utilities for its LIHTC program.

Projects developed under the Internal Revenue Code (IRC) Section 42, LIHTC program, similar to U.S. Dept. of Housing and Urban Development (HUD), United States Department of Agriculture (USDA) and several other agencies' programs, require the implementation of a utility (electric, gas, and water/sewer/garbage) allowance for use in calculating individual tenant subsidies for affordable housing. Due to the complexity of the data required to develop the utility allowances, we have used the services of the Nelrod Company of Fort Worth, Texas, to develop these allowances.

The Nelrod Company has prepared eleven (11) utility allowance schedules and three (3) charts for Fresno City and County as follows:

**LIHTC Utility Allowance Schedules (2) for Energy Efficient Units and S/8 utility Allowances (4) for Non-Energy-Efficient units**

Multi-Family Low-Rise (1 to 4 units) Existing Rehab	Energy Efficient only (others will use Section 8 utility allowances)	Electric/Gas
Multi-Family Mid-Rise (5 or more units) Existing Rehab	Energy Efficient only (others will use Section 8 utility allowances)	Electric/Gas
Apartment Walk-Up (Multi-Family, 0-5 BR)	Non-Energy Efficient (Section 8 utility allowances)	Electric/Gas
Apartment Walk-Up (Multi-Family, 6-7 BR)	Non-Energy Efficient (Section 8 utility allowances)	Electric/Gas
Detached House (Single Family, 0-5 BR)	Non-Energy Efficient (Section 8 utility allowances)	Electric/Gas
Detached House (Single Family, 6-7 BR)	Non-Energy Efficient (Section 8 utility allowances)	Electric/Gas

**Site Specific Mixed Finance Schedules (5) and Charts (3). Please note that the three charts comprise four properties**

Pacific Gardens Tax Credit & LIPH	Apartment/Walk up-Energy Efficient	Electric/Gas
Parc Grove Commons II Tax Credit & Project Based Voucher	Apartment/Row House/TownHouse	Electric/Gas
Parc Grove Commons II Tax Credit & Public Housing	Apartment/Row House/TownHouses	Electric/Gas
Parc Grove North Tax Credit & Public Housing	Apartment/Row House/TownHouses	Electric/Gas
Kerman Acre Tax Credit & Public Housing	Apartment/Walk-Up	Electric/Gas
Southeast RAD Tax Credit & Public Based Rental Assistance	Row House/ TownHouse & Semi – Detached/ Duplex	Electric/Gas

Viking Village RAD Tax Credit & Public Based Rental Assistance	Row House/Townhouse	Electric/Gas
Mendota RAD Tax Credit & Public Based Rental Assistance	Row House/TownHouse & Semi –Detached/ Duplex & Detached House	Electric/Gas
Orange Cove RAD Tax Credit & Public Based Rental Assistance	Row House/TownHouse & Semi –Detached/ Duplex	Electric/Gas

**Note: Yosemite Village is another Site Specific Mixed Finance property whose LIHTC Utility Allowance Schedules have been resubmitted to Nelrod for further analysis and will be presented at a future Board Meeting**

### **Recommendation**

It is recommended that the Board of Commissioners of the Fresno Housing Authority adopt the attached utility allowance rates for new construction, rehabilitation multi-family complexes and mixed finance projects in Fresno County for units developed under IRC Section 42 (LIHTC), to be effective March 24, 2015. The eleven (11) schedules and three (3) charts to be adopted are those aforementioned.

### **Fiscal Impact**

No Fiscal Impact

### **Background Information**

Owners of properties financed with Low Income Housing Tax Credits (LIHTC) must limit rents and incomes to no more than 60% of the Area Median Income (AMI) numbers published annually by HUD. Owners must include the cost of all resident paid utilities in the gross rent charged. To do this, they must obtain annual utility cost estimates for buildings in their LIHTC affordable housing property. Owners may obtain annual allowances from Public Housing Authorities that have jurisdiction, or in California, owners may utilize the California Utility Allowance Calculation developed by the California Energy Commission, for a particular area or they may obtain an estimate from the local utility company, if possible, based on building units with similar size and construction to buildings in the property. In addition, most owners elect percentages below 60% AMI - ranging from 30% to 60% of AMI. The same utility cost estimate numbers apply to the maximum gross rent limit elected by the owner and must therefore be deducted from that limit to obtain the net rent paid by households. The Utility Allowance schedule must be updated on a yearly basis or 10% increase. According to the Internal Revenue Section 1.42-10, for the Low-Income Housing Tax Credit Program, utility allowances must be reviewed and updated at least once during each calendar year. The annual review must take into account any changes in utility rates as well as any changes such as energy conservation measures which may affect the energy consumption of the building. Similar to the LIHTC program, the Low Income Public Housing (LIPH) program and Project Based Voucher (Section 8) program provide requirements for a utility allowance in determining tenant rents. A site specific utility allowance study is conducted on sites that have mixed finance. Mixed finance projects are funded with LIHTC, Public Housing and/or Project Based Vouchers (Section 8).

**RESOLUTION NO. \_\_\_\_\_**  
**BEFORE THE BOARD OF COMMISSIONERS OF THE**  
**HOUSING AUTHORITY OF THE CITY OF FRESNO**

**RESOLUTION ADOPTING MIXED FINANCE AND INTERNAL REVENUE CODE  
SECTION 42 LIHTC UTILITY ALLOWANCE SCHEDULES FOR 2015**

**WHEREAS**, projects developed under the Internal Revenue Code (IRC) Section 42, Low Income Housing Tax Credit (LIHTC) program, similar to U.S. Dept. of Housing and Urban Development, United States Department of Agriculture (USDA) and several other agencies' programs, require the implementation of a utility (electric, gas, and water/sewer/garbage) allowance for use in calculating individual tenant subsidies for affordable housing; and

**WHEREAS**, the annual update to the Utility Allowance (UA) schedule for LIHTC developments and site specific mixed-finance LIHTC properties that include Low Income Public Housing (LIPH) and/or Project Based Voucher (Section 8); and

**WHEREAS**, the utility allowance schedules are made available to developers and owners, including the Fresno Housing Authority (FH), of LIHTC properties throughout Fresno County; and

**WHEREAS**, due to the complexity of the data required to develop the utility allowances, the services of Nelrod Company of Fort Worth, Texas have been utilized to develop these allowances and provided eleven (11) utility allowance schedules in a report dated December 2014 and three (3) charts dated February 2015.

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Housing Authority of the City of Fresno do hereby adopt the eleven (11) utility allowance schedules and three (3) charts for new construction, rehabilitation multi families complexes and mixed-finance projects in Fresno City and County for units developed under Internal Revenue Code Section 42 (LIHTC), as prepared by the Nelrod Company in December 2014 and February 2015.

**PASSED AND ADOPTED THIS** 24th day of March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

**RESOLUTION NO. \_\_\_\_\_**  
**BEFORE THE BOARD OF COMMISSIONERS OF THE**  
**HOUSING AUTHORITY OF THE COUNTY OF FRESNO**

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Preston Prince, Secretary of the Boards of Commissioners

**Allowances for Tenant  
Furnished Utilities and other  
Services**

U.S. Department of Housing and  
Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 09/30/2017)

Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Multi-Family Low-Rise (1-4 Units) (LIHTC)</b>					Date (mm/dd/yyyy)		
Utility or Service <b>Energy Efficient</b>		Monthly Dollar Allowances							
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	7 BR
Heating	a. Natural Gas	\$20	\$23	\$24	\$24	\$24	\$24	\$26	\$28
	b. Bottle Gas/Propane								
	c. Electric	\$12	\$14	\$17	\$20	\$24	\$27	\$29	\$31
	d. Electric Heat Pump	\$5	\$6	\$7	\$8	\$10	\$11	\$11	\$12
	e. Oil / Other								
Cooking	a. Natural Gas	\$3	\$4	\$5	\$5	\$6	\$7	\$8	\$9
	b. Bottle Gas/Propane								
	c. Electric	\$5	\$6	\$7	\$8	\$10	\$11	\$12	\$13
Other Electric (Lights & Appliances)		\$19	\$22	\$30	\$39	\$47	\$56	\$62	\$69
Air Conditioning		\$9	\$11	\$14	\$17	\$21	\$24	\$26	\$28
Water Heating	a. Natural Gas	\$8	\$9	\$13	\$16	\$18	\$20	\$22	\$24
	b. Bottle Gas/Propane								
	c. Electric	\$10	\$12	\$17	\$21	\$25	\$27	\$29	\$31
	d. Oil / Other								
Water		N/A							
Sewer									
Trash Collection									
Range / Microwave Tenant-purchasing/leasing									
Refrigerator Tenant-purchasing/leasing									
Other-- <b>CA Climate Credit \$-4.13</b>		\$-4	\$-4	\$-4	\$-4	\$-4	\$-4	\$-4	\$-4
specify:									
<b>Actual Family Allowances</b>					Utility or Service		per month cost		
To be used by the family to compute allowance. Complete below for the actual unit rented.					Heating		\$		
					Cooking		\$		
Name of Family					Other Electric		\$		
					Air Conditioning		\$		
					Water Heating		\$		
					Water		\$		
					Sewer		\$		
					Trash Collection		\$		
					Range / Microwave		\$		
					Refrigerator		\$		
Address of Unit					Other		\$		
					Other		\$		
					Total		\$		
Number of Bedrooms									



The Nelrod Company 1/2015 Update

form HUD-52667 (09/14)  
ref. Handbook 7420.8

**Allowances for Tenant  
Furnished Utilities and other  
Services**

U.S. Department of Housing and  
Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 09/30/2017)

Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Multi-Family Mid-Rise (5 or More Units) (LIHTC)</b>					Date (mm/dd/yyyy)		
Utility or Service <b>Energy Efficient</b>		Monthly Dollar Allowances							
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	7 BR
Heating	a. Natural Gas	\$8	\$9	\$11	\$12	\$14	\$15	\$16	\$17
	b. Bottle Gas/Propane								
	c. Electric	\$8	\$10	\$12	\$15	\$17	\$20	\$21	\$23
	d. Electric Heat Pump	\$3	\$4	\$5	\$6	\$7	\$8	\$8	\$9
	e. Oil / Other								
Cooking	a. Natural Gas	\$3	\$4	\$5	\$5	\$6	\$7	\$8	\$9
	b. Bottle Gas/Propane								
	c. Electric	\$5	\$6	\$7	\$8	\$10	\$11	\$12	\$13
Other Electric (Lights & Appliances)		\$16	\$19	\$25	\$31	\$37	\$43	\$47	\$51
Air Conditioning		\$6	\$7	\$11	\$15	\$18	\$22	\$24	\$26
Water Heating	a. Natural Gas	\$8	\$9	\$13	\$16	\$18	\$20	\$22	\$24
	b. Bottle Gas/Propane								
	c. Electric	\$10	\$12	\$17	\$21	\$25	\$27	\$29	\$31
	d. Oil / Other								
Water		N/A							
Sewer									
Trash Collection									
Range / Microwave Tenant-purchasing/leasing									
Refrigerator Tenant-purchasing/leasing									
Other-- CA Climate Credit \$-4.13		-\$4	-\$4	-\$4	-\$4	-\$4	-\$4	-\$4	-\$4
specify:									
<b>Actual Family Allowances</b>		Utility or Service		per month cost					
To be used by the family to compute allowance. Complete below for the actual unit rented.		Heating		\$					
		Cooking		\$					
Name of Family		Other Electric		\$					
		Air Conditioning		\$					
		Water Heating		\$					
		Water		\$					
		Sewer		\$					
Address of Unit		Trash Collection		\$					
		Range / Microwave		\$					
		Refrigerator		\$					
		Other		\$					
		Other		\$					
Number of Bedrooms		Total		\$					



The Nelrod Company 1/2015 Update

form HUD-52667 (09/14)  
ref. Handbook 7420.8

**Allowances for Tenant  
Furnished Utilities and other  
Services**

U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 09/30/2017)

Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Detached House (Single-Family)</b>				Date (mm/dd/yyyy) <b>01/01/15</b>																													
Utility or Service		Monthly Dollar Allowances																																	
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR																												
Heating	a. Natural Gas	\$21	\$24	\$27	\$30	\$32	\$35																												
	b. Bottle Gas/Propane																																		
	c. Electric	\$19	\$22	\$26	\$29	\$32	\$36																												
	e. Oil / Other																																		
Cooking	a. Natural Gas	\$4	\$4	\$4	\$6	\$7	\$8																												
	b. Bottle Gas/Propane																																		
	c. Electric	\$5	\$6	\$8	\$9	\$11	\$13																												
Other Electric (Climate Credit, Lights, & Appliances)		\$21	\$26	\$35	\$46	\$60	\$75																												
Air Conditioning		\$9	\$11	\$17	\$24	\$30	\$36																												
Water Heating	a. Natural Gas	\$8	\$10	\$13	\$17	\$20	\$21																												
	b. Bottle Gas/Propane																																		
	c. Electric	\$11	\$13	\$19	\$24	\$28	\$30																												
	d. Oil / Other																																		
Water, Sewer & Trash Collection		Biola \$90																																	
Range / Microwave Tenant-purchasing/leasing		\$12	\$12	\$12	\$12	\$12	\$12																												
Refrigerator Tenant-purchasing/leasing		\$13	\$13	\$13	\$13	\$13	\$13																												
<b>Other--</b>																																			
<b>specify: Medical Allowances</b>																																			
<b>SoCal Gas Fee \$4.08</b>		\$4	\$4	\$4	\$4	\$4	\$4																												
<b>Actual Family Allowances</b>		<table border="1"> <thead> <tr> <th>Utility or Service</th> <th>per month cost</th> </tr> </thead> <tbody> <tr> <td>Heating</td> <td>\$</td> </tr> <tr> <td>Cooking</td> <td>\$</td> </tr> <tr> <td>Other Electric</td> <td>\$</td> </tr> <tr> <td>Air Conditioning</td> <td>\$</td> </tr> <tr> <td>Water Heating</td> <td>\$</td> </tr> <tr> <td>Water, Sewer &amp; Trash</td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td>Range / Microwave</td> <td>\$</td> </tr> <tr> <td>Refrigerator</td> <td>\$</td> </tr> <tr> <td>Other: Medical Allowance</td> <td>\$</td> </tr> <tr> <td>Other: SoCal Gas Fee</td> <td>\$</td> </tr> <tr> <td><b>Total</b></td> <td><b>\$0</b></td> </tr> </tbody> </table>						Utility or Service	per month cost	Heating	\$	Cooking	\$	Other Electric	\$	Air Conditioning	\$	Water Heating	\$	Water, Sewer & Trash						Range / Microwave	\$	Refrigerator	\$	Other: Medical Allowance	\$	Other: SoCal Gas Fee	\$	<b>Total</b>	<b>\$0</b>
Utility or Service	per month cost																																		
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Name of Family																																			
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The Nelrod Company Revised 12/2014

form HUD-52667 (09/14)  
ref. Handbook 7420.8



**Allowances for Tenant  
Furnished Utilities and other  
Services**

U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 09/30/2017)

Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Detached House (Single-Family)</b>		Date (mm/dd/yyyy) 01/01/15																														
Utility or Service		Monthly Dollar Allowances																																
		6 BR	7 BR																															
Heating	a. Natural Gas	\$38	\$40																															
	b. Bottle Gas/Propane																																	
	c. Electric	\$39	\$42																															
	e. Oil / Other																																	
Cooking	a. Natural Gas	\$9	\$10																															
	b. Bottle Gas/Propane																																	
	c. Electric	\$14	\$15																															
Other Electric (Climate Credit, Lights, & Appliances)		\$84	\$92																															
Air Conditioning		\$39	\$42																															
Water Heating	a. Natural Gas	\$23	\$25																															
	b. Bottle Gas/Propane																																	
	c. Electric	\$33	\$35																															
	d. Oil / Other																																	
Water, Sewer & Trash Collection		Biola \$90																																
Range / Microwave Tenant-purchasing/leasing		\$12	\$12																															
Refrigerator Tenant-purchasing/leasing		\$13	\$13																															
Other-- specify:	Medical Allowances																																	
	SoCal Gas Fee \$4.08	\$4	\$4																															
<b>Actual Family Allowances</b>				<table border="1"> <thead> <tr> <th>Utility or Service</th> <th>per month cost</th> </tr> </thead> <tbody> <tr> <td>Heating</td> <td>\$</td> </tr> <tr> <td>Cooking</td> <td>\$</td> </tr> <tr> <td>Other Electric</td> <td>\$</td> </tr> <tr> <td>Air Conditioning</td> <td>\$</td> </tr> <tr> <td>Water Heating</td> <td>\$</td> </tr> <tr> <td>Water, Sewer &amp; Trash</td> <td>\$</td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td>Range / Microwave</td> <td>\$</td> </tr> <tr> <td>Refrigerator</td> <td>\$</td> </tr> <tr> <td>Other: Medical Allowance</td> <td>\$ 0</td> </tr> <tr> <td>Other: SoCal Gas Fee</td> <td>\$</td> </tr> <tr> <td><b>Total</b></td> <td><b>\$0</b></td> </tr> </tbody> </table>			Utility or Service	per month cost	Heating	\$	Cooking	\$	Other Electric	\$	Air Conditioning	\$	Water Heating	\$	Water, Sewer & Trash	\$					Range / Microwave	\$	Refrigerator	\$	Other: Medical Allowance	\$ 0	Other: SoCal Gas Fee	\$	<b>Total</b>	<b>\$0</b>
Utility or Service	per month cost																																	
Heating	\$																																	
Cooking	\$																																	
Other Electric	\$																																	
Air Conditioning	\$																																	
Water Heating	\$																																	
Water, Sewer & Trash	\$																																	
Range / Microwave	\$																																	
Refrigerator	\$																																	
Other: Medical Allowance	\$ 0																																	
Other: SoCal Gas Fee	\$																																	
<b>Total</b>	<b>\$0</b>																																	
To be used by the family to compute allowance. Complete below for the actual unit rented.																																		
Name of Family																																		
Address of Unit																																		
Number of Bedrooms																																		



The Nelrod Company Revised 12/2014

form HUD-52667 (09/14)  
ref. Handbook 7420.8

**Allowances for Tenant  
Furnished Utilities and other  
Services**

U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 09/30/2017)

Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Apartment/ Walk-Up (Multi-Family)</b>				Date (mm/dd/yyyy) <b>01/01/15</b>	
Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	\$9	\$10	\$12	\$13	\$15	\$17
	b. Bottle Gas/Propane						
	c. Electric	\$9	\$11	\$14	\$16	\$19	\$22
	e. Oil / Other						
Cooking	a. Natural Gas	\$4	\$4	\$4	\$6	\$7	\$8
	b. Bottle Gas/Propane						
	c. Electric	\$5	\$6	\$8	\$9	\$11	\$13
Other Electric (Climate Credit, Lights, & Appliances)		\$13	\$17	\$23	\$30	\$37	\$45
Air Conditioning		\$6	\$7	\$12	\$16	\$21	\$25
Water Heating	a. Natural Gas	\$8	\$10	\$13	\$17	\$20	\$21
	b. Bottle Gas/Propane						
	c. Electric	\$11	\$13	\$19	\$24	\$28	\$30
	d. Oil / Other						
Water Sewer & Trash Collection							
Range / Microwave Tenant-purchasing/leasing		\$12	\$12	\$12	\$12	\$12	\$12
Refrigerator Tenant-purchasing/leasing		\$13	\$13	\$13	\$13	\$13	\$13
Other-- Medical Allowances							
specify: SoCal Gas Fee \$4.08		\$4	\$4	\$4	\$4	\$4	\$4
<b>Actual Family Allowances</b>		Utility or Service		per month cost			
To be used by the family to compute allowance. Complete below for the actual unit rented.		Heating		\$			
		Cooking		\$			
		Other Electric		\$			
		Air Conditioning		\$			
		Water Heating		\$			
		Water, Sewer & Trash		\$			
		Range / Microwave		\$			
		Refrigerator		\$			
Name of Family		Other: Medical Allowance		\$			
		Other: SoCal Gas Fee		\$			
		Total		\$ \$0			
Address of Unit							
Number of Bedrooms							



The Nelrod Company Revised 12/2014

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**Allowances for Tenant  
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U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
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Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Apartment/ Walk-Up (Multi-Family)</b>		Date (mm/dd/yyyy) 01/01/15		
Utility or Service		Monthly Dollar Allowances				
		6 BR	7 BR			
Heating	a. Natural Gas	\$19	\$20			
	b. Bottle Gas/Propane					
	c. Electric	\$24	\$26			
	e. Oil / Other					
Cooking	a. Natural Gas	\$9	\$10			
	b. Bottle Gas/Propane					
	c. Electric	\$14	\$15			
Other Electric (Climate Credit, Lights, & Appliances)		\$49	\$50			
Air Conditioning		\$27	\$29			
Water Heating	a. Natural Gas	\$23	\$25			
	b. Bottle Gas/Propane					
	c. Electric	\$33	\$35			
	d. Oil / Other					
Water, Sewer & Trash Collection						
Range / Microwave Tenant-purchasing/leasing		\$12	\$12			
Refrigerator Tenant-purchasing/leasing		\$13	\$13			
Other-- Medical Allowances						
specify: SoCal Gas Fee \$4.08		\$4	\$4			
<b>Actual Family Allowances</b>				Utility or Service		per month cost
To be used by the family to compute allowance. Complete below for the actual unit rented.  Name of Family  Address of Unit        Number of Bedrooms				Heating		\$
				Cooking		\$
				Other Electric		\$
				Air Conditioning		\$
				Water Heating		\$
				Water, Sewer & Trash		\$
				Range / Microwave		\$
				Refrigerator		\$
Other: Medical Allowance		\$				
Other: SoCal Gas Fee		\$				
Total		\$	\$0			



The Nelrod Company Revised 12/2014

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**Allowances for Tenant  
Furnished Utilities and other  
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U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
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Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Apartment - Energy Efficient</b>		Date (mm/dd/yyyy)			
Utility or Service <b>Pacific Gardens Apartments</b>		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas		\$9.00	\$11.00	\$12.00		
	b. Bottle Gas/Propane						
	c. Electric						
	d. Electric Heat Pump						
	e. Oil / Other						
Cooking	a. Natural Gas						
	b. Bottle Gas/Propane						
	c. Electric		\$5.00	\$7.00	\$8.00		
Other Electric (Lights & Appliances)			\$18.00	\$23.00	\$29.00		
Air Conditioning			\$6.00	\$10.00	\$13.00		
Water Heating	a. Natural Gas		\$9.00	\$13.00	\$16.00		
	b. Bottle Gas/Propane						
	c. Electric						
	d. Oil / Other						
Water							
Sewer							
Trash Collection							
Range / Microwave Tenant-purchasing/leasing							
Refrigerator Tenant-purchasing/leasing							
Other-- specify:	Climate Credit \$-4.97		-\$5.00	-\$5.00	-\$5.00		
<b>Actual Family Allowances</b>				Utility or Service		per month cost	
To be used by the family to compute allowance. Complete below for the actual unit rented.  Name of Family _____  Address of Unit _____  Number of Bedrooms _____				Heating		\$	
				Cooking		\$	
				Other Electric		\$	
				Air Conditioning		\$	
				Water Heating		\$	
				Water		\$	
				Sewer		\$	
				Trash Collection		\$	
				Range / Microwave		\$	
				Refrigerator		\$	
				Other		\$	
				Other		\$	
				Total		\$	



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**Allowances for Tenant  
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U.S. Department of Housing and Urban  
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Office of Public and Indian Housing

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Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Apartment/ Row House/Townhouse</b>		Date (mm/dd/yyyy)			
Utility or Service <b>Parc Grove Commons (Tax Credit)</b>		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas		\$12.00	\$14.00	\$15.00	\$20.00	
	b. Bottle Gas/Propane						
	c. Electric						
	d. Electric Heat Pump						
	e. Oil / Other						
Cooking	a. Natural Gas		\$5.00	\$6.00	\$7.00	\$9.00	
	b. Bottle Gas/Propane						
	c. Electric						
Other Electric (Lights & Appliances)			\$13.00	\$14.00	\$15.00	\$16.00	
Air Conditioning			\$8.00	\$10.00	\$14.00	\$18.00	
Water Heating	a. Natural Gas		\$11.00	\$13.00	\$15.00	\$16.00	
	b. Bottle Gas/Propane						
	c. Electric						
	d. Oil / Other						
Water							
Sewer							
Trash Collection							
Range / Microwave Tenant-purchasing/leasing							
Refrigerator Tenant-purchasing/leasing							
Other-- specify:	<b>Climate Credit Fee \$-4.97</b>		-\$5.00	-\$5.00	-\$5.00	-\$5.00	
<b>Actual Family Allowances</b>				Utility or Service		per month cost	
To be used by the family to compute allowance. Complete below for the actual unit rented.  Name of Family _____  Address of Unit _____  Number of Bedrooms _____				Heating		\$	
				Cooking		\$	
				Other Electric		\$	
				Air Conditioning		\$	
				Water Heating		\$	
				Water		\$	
				Sewer		\$	
				Trash Collection		\$	
				Range / Microwave		\$	
				Refrigerator		\$	
				Other		\$	
				Other		\$	
				Total		\$	



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U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
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Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Apartment/ Row House/Townhouse</b>		Date (mm/dd/yyyy)			
Utility or Service <b>Parc Grove Commons (Public Housing)</b>		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas		\$12.00	\$14.00	\$15.00	\$20.00	
	b. Bottle Gas/Propane						
	c. Electric						
	d. Electric Heat Pump						
	e. Oil / Other						
Cooking	a. Natural Gas		\$5.00	\$6.00	\$7.00	\$9.00	
	b. Bottle Gas/Propane						
	c. Electric						
Other Electric (Lights & Appliances)			\$13.00	\$14.00	\$15.00	\$16.00	
Air Conditioning							
Water Heating	a. Natural Gas		\$11.00	\$13.00	\$15.00	\$16.00	
	b. Bottle Gas/Propane						
	c. Electric						
	d. Oil / Other						
Water							
Sewer							
Trash Collection							
Range / Microwave Tenant-purchasing/leasing							
Refrigerator Tenant-purchasing/leasing							
Other-- specify:	Climate Credit Fee \$-4.97		-\$5.00	-\$5.00	-\$5.00	-\$5.00	
<b>Actual Family Allowances</b>		Utility or Service		per month cost			
To be used by the family to compute allowance. Complete below for the actual unit rented.  Name of Family  Address of Unit  Number of Bedrooms		Heating		\$			
		Cooking		\$			
		Other Electric		\$			
		Air Conditioning		\$			
		Water Heating		\$			
		Water		\$			
		Sewer		\$			
		Trash Collection		\$			
		Range / Microwave		\$			
		Refrigerator		\$			
		Other		\$			
Other		\$					
Total		\$					



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Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Apartment-Energy Efficient</b>				Date (mm/dd/yyyy)																													
Utility or Service <b>Parc Grove North</b>		Monthly Dollar Allowances																																	
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR																												
Heating	a. Natural Gas	\$8.00	\$9.00	\$11.00	\$12.00	\$14.00	\$15.00																												
	b. Bottle Gas/Propane																																		
	c. Electric	\$7.00	\$9.00	\$11.00	\$14.00	\$16.00	\$18.00																												
	d. Electric Heat Pump	\$3.00	\$4.00	\$5.00	\$6.00	\$6.00	\$7.00																												
	e. Oil / Other																																		
Cooking	a. Natural Gas	\$3.00	\$4.00	\$5.00	\$5.00	\$6.00	\$7.00																												
	b. Bottle Gas/Propane																																		
	c. Electric	\$4.00	\$5.00	\$7.00	\$8.00	\$9.00	\$10.00																												
Other Electric (Lights & Appliances)		\$15.00	\$18.00	\$23.00	\$29.00	\$34.00	\$40.00																												
Air Conditioning		\$5.00	\$6.00	\$10.00	\$13.00	\$17.00	\$21.00																												
Water Heating	a. Natural Gas	\$8.00	\$9.00	\$13.00	\$16.00	\$18.00	\$20.00																												
	b. Bottle Gas/Propane																																		
	c. Electric	\$9.00	\$11.00	\$16.00	\$20.00	\$23.00	\$25.00																												
	d. Oil / Other																																		
Water																																			
Sewer																																			
Trash Collection																																			
Range / Microwave Tenant-purchasing/leasing																																			
Refrigerator Tenant-purchasing/leasing																																			
Other-- specify:	<b>Climate Credit \$-4.97</b>	<b>-\$5.00</b>	<b>-\$5.00</b>	<b>-\$5.00</b>	<b>-\$5.00</b>	<b>-\$5.00</b>	<b>-\$5.00</b>																												
<b>Actual Family Allowances</b>		<table border="1"> <thead> <tr> <th>Utility or Service</th> <th>per month cost</th> </tr> </thead> <tbody> <tr><td>Heating</td><td>\$</td></tr> <tr><td>Cooking</td><td>\$</td></tr> <tr><td>Other Electric</td><td>\$</td></tr> <tr><td>Air Conditioning</td><td>\$</td></tr> <tr><td>Water Heating</td><td>\$</td></tr> <tr><td>Water</td><td>\$</td></tr> <tr><td>Sewer</td><td>\$</td></tr> <tr><td>Trash Collection</td><td>\$</td></tr> <tr><td>Range / Microwave</td><td>\$</td></tr> <tr><td>Refrigerator</td><td>\$</td></tr> <tr><td>Other</td><td>\$</td></tr> <tr><td>Other</td><td>\$</td></tr> <tr><td>Total</td><td>\$</td></tr> </tbody> </table>						Utility or Service	per month cost	Heating	\$	Cooking	\$	Other Electric	\$	Air Conditioning	\$	Water Heating	\$	Water	\$	Sewer	\$	Trash Collection	\$	Range / Microwave	\$	Refrigerator	\$	Other	\$	Other	\$	Total	\$
Utility or Service	per month cost																																		
Heating	\$																																		
Cooking	\$																																		
Other Electric	\$																																		
Air Conditioning	\$																																		
Water Heating	\$																																		
Water	\$																																		
Sewer	\$																																		
Trash Collection	\$																																		
Range / Microwave	\$																																		
Refrigerator	\$																																		
Other	\$																																		
Other	\$																																		
Total	\$																																		
Name of Family																																			
Address of Unit																																			
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Locality: <b>Housing Authorities of the City &amp; County of Fresno, CA</b>		Unit Type: <b>Apartment</b>		Date (mm/dd/yyyy)			
Utility or Service <b>Kerman Acre Apartments</b>		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas						
	b. Bottle Gas/Propane						
	c. Electric				\$17.00	\$20.00	
	d. Electric Heat Pump						
	e. Oil / Other						
Cooking	a. Natural Gas						
	b. Bottle Gas/Propane						
	c. Electric				\$12.00	\$14.00	
Other Electric (Lights & Appliances)					\$15.00	\$16.00	
Air Conditioning					\$16.00	\$20.00	
Water Heating	a. Natural Gas				\$16.00	\$20.00	
	b. Bottle Gas/Propane						
	c. Electric						
	d. Oil / Other						
Water							
Sewer							
Trash Collection							
Range / Microwave Tenant-purchasing/leasing							
Refrigerator Tenant-purchasing/leasing							
Other-- Climate Credit \$-4.97							
specify:							
<b>Actual Family Allowances</b>				Utility or Service		per month cost	
To be used by the family to compute allowance. Complete below for the actual unit rented.  Name of Family _____  Address of Unit _____  Number of Bedrooms _____				Heating		\$	
				Cooking		\$	
				Other Electric		\$	
				Air Conditioning		\$	
				Water Heating		\$	
				Water		\$	
				Sewer		\$	
				Trash Collection		\$	
				Range / Microwave		\$	
				Refrigerator		\$	
				Other		\$	
				Other		\$	
				Total		\$	



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# HOUSING AUTHORITIES OF THE CITY & COUNTY OF FRESNO, CA

Multi-Family - RAD (Tax Credit with Project-Based Rental Assistance)

## PROPOSED MONTHLY UTILITY ALLOWANCES

Chart 1 - City of Fresno, CA

UPDATE 2015

### Southeast RAD

Building Type: Semi-Detached/Duplex

Cedar Courts I CA-06/08 (EE Equip: Win,WH,WS)	1BR	2BR	3BR	4BR	5BR	6BR
Electricity (L&A) (PGE)	\$14.00	\$18.00	\$23.00	\$28.00	\$33.00	\$36.00
Natural Gas (H,WH,C) (PGE)	\$25.00	\$30.00	\$35.00	\$38.00	\$43.00	\$49.00
<b>Totals</b>	<b>\$39.00</b>	<b>\$48.00</b>	<b>\$58.00</b>	<b>\$66.00</b>	<b>\$76.00</b>	<b>\$85.00</b>

Building Type: Semi-Detached/Duplex

Cedar Courts II CA-06/9b (EE Equip: Win,WH,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)		\$14.00	\$18.00	\$23.00	\$28.00	\$33.00
Natural Gas (H,WH,C) (PGE)		\$25.00	\$30.00	\$35.00	\$39.00	\$44.00
<b>Totals</b>		<b>\$39.00</b>	<b>\$48.00</b>	<b>\$58.00</b>	<b>\$67.00</b>	<b>\$77.00</b>

Building Type: Row House/Townhouse

Inyo Terrace CA-6/16 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A,A/C) (PGE)			\$36.00			
Natural Gas (H,WH,C) (PGE)			\$30.00			
<b>Totals</b>			<b>\$66.00</b>			

### Viking Village RAD

Building Type: Row House/Townhouse

Viking Village CA-06/15 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A,A/C) (PGE)			\$36.00	\$46.00		
Natural Gas (H,WH,C) (PGE)			\$30.00	\$35.00		
<b>Totals</b>			<b>\$66.00</b>	<b>\$81.00</b>		

A monthly average cost of the summer and winter adjustments were used for the total costs.

L&A= Lights & Appliances

A/C= Air Conditioning

H= Space Heating

WH= Water Heating

C= Cooking

EE Equip= Energy Efficient Equipment

Win= Windows

WS= Water Saving Appliances

PGE= Pacific Gas & Electric



# HOUSING AUTHORITIES OF THE CITY & COUNTY OF FRESNO, CA

Multi-Family - RAD (Tax Credit with Project-Based Rental Assistance)

## PROPOSED MONTHLY UTILITY ALLOWANCES

Chart 2 - County of Fresno, CA

UPDATE 2015

### Mendota RAD

Building Type: Semi-Detached/Duplex

Rios Terrace I CA-28/09 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)		\$14.00	\$18.00	\$23.00	\$28.00	
Natural Gas (H,WH,C) (PGE)		\$26.00	\$32.00	\$36.00	\$40.00	
<b>Totals</b>		<b>\$40.00</b>	<b>\$50.00</b>	<b>\$59.00</b>	<b>\$68.00</b>	

Building Type: Semi-Detached/Duplex

Rios Terrace II CA-28/14 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)		\$14.00	\$18.00	\$23.00	\$28.00	\$33.00
Natural Gas (H,WH,C) (PGE)		\$26.00	\$32.00	\$36.00	\$40.00	\$46.00
<b>Totals</b>		<b>\$40.00</b>	<b>\$50.00</b>	<b>\$59.00</b>	<b>\$68.00</b>	<b>\$79.00</b>

Building Type: Detached House

Rios Terrace II CA-28/14 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)					\$28.00	
Natural Gas (H,WH,C) (PGE)					\$65.00	
<b>Totals</b>					<b>\$93.00</b>	

Building Type: Row House/Townhouse

Mendota Apartments CA-28/26 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)	\$14.00	\$14.00				
Natural Gas (H,WH,C) (PGE)	\$24.00	\$24.00				
<b>Totals</b>	<b>\$38.00</b>	<b>\$38.00</b>				

A monthly average cost of the summer and winter adjustments were used for the total costs.

L&A= Lights & Appliances  
A/C= Air Conditioning  
H= Space Heating  
WH= Water Heating  
C= Cooking

EE Equip= Energy Efficient Equipment  
Win= Windows  
WS= Water Saving Appliances  
PGE= Pacific Gas & Electric  
SoCalGas= Southern California Gas Company

# HOUSING AUTHORITIES OF THE CITY & COUNTY OF FRESNO, CA

Multi-Family - RAD (Tax Credit with Project-Based Rental Assistance)

## PROPOSED MONTHLY UTILITY ALLOWANCES

Chart 2 - County of Fresno, CA

Building Type: Semi-Detached/Duplex

Mendota Apartments CA-28/26 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)			\$18.00			
Natural Gas (H,WH,C) (PGE)			\$33.00			
<b>Totals</b>			<b>\$51.00</b>			

Building Type: Detached House

Mendota Apartments CA-28/26 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)				\$23.00	\$28.00	
Natural Gas (H,WH,C) (PGE)				\$61.00	\$68.00	
<b>Totals</b>				<b>\$84.00</b>	<b>\$96.00</b>	

Orange Cove RAD

Building Type: Semi-Detached/Duplex

Kuffel Terrace I CA-28/04 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)		\$14.00	\$18.00	\$23.00	\$28.00	
Natural Gas (H,WH,C) (SoCalGas)		\$24.00	\$29.00	\$33.00	\$36.00	
<b>Totals</b>		<b>\$38.00</b>	<b>\$47.00</b>	<b>\$56.00</b>	<b>\$64.00</b>	

Building Type: Semi-Detached/Duplex

Kuffel Terrace II CA-28/16 (EE Equip: Win,WS)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A) (PGE)			\$18.00	\$23.00	\$28.00	
Natural Gas (H,WH,C) (SoCalGas)			\$29.00	\$33.00	\$36.00	
<b>Totals</b>			<b>\$47.00</b>	<b>\$56.00</b>	<b>\$64.00</b>	

Building Type: Row House/Townhouse

Mountain View Apartments CA-28/31 (EE Equip: Win)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A,A/C) (PGE)			\$36.00			
Natural Gas (H,WH,C) (SoCalGas)			\$25.00			
<b>Totals</b>			<b>\$61.00</b>			

Building Type: Semi-Detached/Duplex

Mountain View Apartments CA-28/31 (EE Equip: Win)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A,A/C) (PGE)			\$36.00	\$46.00	\$58.00	
Natural Gas (H,WH,C) (SoCalGas)			\$28.00	\$31.00	\$35.00	
<b>Totals</b>			<b>\$64.00</b>	<b>\$77.00</b>	<b>\$93.00</b>	

## BOARD MEMO

O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 5h

**AUTHOR:** Angie Nguyen

**SUBJECT:** Ratification of the Application to the Department of Housing and Urban Development Veterans Affairs Supportive Housing Program

---

### Executive Summary

The U.S. Department of Housing and Urban Development (HUD) in collaboration with the U.S. Department of Veteran Affairs (VA) oversees the Veteran Affairs Supportive Housing Program (VASH). The two departments jointly determine the allocation of VASH vouchers awarded to each Public Housing Agency, if any, based on the percentage of veterans experiencing homelessness in the community. VASH vouchers are administered by the PHA in partnership with the local VA Medical Center (VAMC).

To date, the Housing Authority of the City and County of Fresno (HACCF) has been awarded 296 VASH vouchers, 202 currently under lease. The 2015 homeless count estimates 140 unsheltered Veterans in the Fresno-Madera area. HUD and the VA invited HACCF to apply for forty-seven (47) additional VASH vouchers with an application deadline of March 20, 2015 bringing the total to 343. We will continue to partner with the VAMC.

### Recommendation

It is recommended that the Board of Commissioners of the Housing Authorities of the City and County of Fresno adopt the attached resolution authorizing: (a) the acceptance of administration of forty-seven (47) VASH vouchers, (b) negotiation and execution, by the Executive Director, of any resulting contract(s), and associated amendments; (c) to incorporate the new funding into the HACCF approved Fiscal Year 2015 budget or when agreement is executed; and (d) to hire related personnel to administer the program(s) in accordance with the funding requirements.

### Fiscal Impact

Fiscal impact is minimal and determined by future proration of Administrative Fees associated with the Housing Choice Voucher program. In addition, program has no match requirement.

RESOLUTION NO. \_\_\_\_\_

BEFORE THE BOARD OF COMMISSIONERS OF THE

HOUSING AUTHORITIES OF THE CITY OF FRESNO

RESOLUTION RATIFICATION OF THE APPLICATION TO THE DEPARTMENT OF  
HOUSING AND URBAN DEVELOPMENT VETERANS AFFAIRS SUPPORTIVE  
HOUSING PROGRAM

WHEREAS, the Department of Housing and Urban Development and the Department of Veteran Affairs has requested the Housing Authority of the City of Fresno to accept administration of forty-seven (47) Veterans Affairs Supportive Housing (VASH) vouchers; and,

WHEREAS, said program is intended to serve Veterans experiencing homelessness in the Fresno area.

NOW THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of the City of Fresno, hereby authorize the Executive Director or his designee to proceed with negotiation and execute all ancillary documents in connection therewith for an agreement with the Department of Housing and Urban Development for administration of Veterans Affairs Supportive Housing (VASH) vouchers.

PASSED AND ADOPTED THIS 24th DAY OF March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Board of Commissioners

RESOLUTION NO. \_\_\_\_\_

BEFORE THE BOARD OF COMMISSIONERS OF THE

HOUSING AUTHORITIES OF FRESNO COUNTY

RESOLUTION RATIFICATION FO THE APPLICATION TO THE DEPARTMENT OF  
HOUSING AND URBAN DEVELOPMENT VETERANS AFFAIRS SUPPORTIVE  
HOUSING PROGAM

WHEREAS, the Department of Housing and Urban Development and the Department of Veteran Affairs has requested the Housing Authority of the City of Fresno to accept administration of forty-seven (47) Veterans Affairs Supportive Housing (VASH) vouchers; and,

WHEREAS, said program is intended to serve Veterans experiencing homelessness in the Fresno area.

NOW THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of the County of Fresno, hereby authorize the Executive Director or his designee to proceed with negotiation and execute all ancillary documents in connection therewith for an agreement with the Department of Housing and Urban Development for administration of Veterans Affairs Supportive Housing (VASH) vouchers.

PASSED AND ADOPTED THIS 24th DAY OF March, 2015. I, the undersigned, herby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Board of Commissioners

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O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 6a

**AUTHOR:** Clayton E. Lucas II

**SUBJECT:** Performance Management Overview

---

### Executive Summary

Fresno Housing (FH) recognizes that an effective performance evaluation program improves the performance, productivity and motivation of employees. The successful implementation and administration of the Agency's performance management system is vital to the success of its mission and strategic initiatives. The Agency's Performance Management System was established to:

- Provide clear performance goals and objectives that are relevant to the Agency's mission and strategic initiatives
- Measure and improve employee performance
- Encourage professional development and career growth
- Provide a record of work history that may be used to support employment decisions
- Reward exemplary performance

The Performance Management process is based on competency and goal achievement during a 12-month evaluation cycle. There are four scheduled meetings (the Goal Setting Conference, two coaching sessions and the formal Performance Evaluation) and an expectation of several informal meetings. Over the course of the year, the employee's performance will be evaluated against the requirements of the Position Description, Agency competencies, the established goals, and other factors. Additional oversight during this process comes from the Departmental Director (or similar position) and the Human Resources Department.

### Recommendation

None at this time. Informational only.

### Fiscal Impact

None at this time.

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O (559) 443-8400

F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince

CEO/Executive Director

**SUBJECT:** Resident Services Strategy

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 6b

**AUTHOR:** Tracewell Hanrahan

---

### Executive Summary

Over the past two years, the Boards of Commissioners have made a commitment to more intentionally support the delivery of services provided to the residents of Fresno Housing with the goal to help them reach their goals of self-sufficiency. Staff has been working to evaluate the current programming and capacity of the department, and develop a strategic direction and implementation plan that will further the Boards' specific commitment to this work and align with the goals and strategic plan for the agency.

Several staff participated in a series of thoughtful discussions and planning sessions centered around key goals:

- Develop a set of focus areas for the department based on the most significant barriers to self-sufficiency and supported by research and best practices.
- Create a set of specific programmatic goals with metrics attached to those goals and determine ways to gather baseline data and measure success.
- Design a program delivery system and infrastructure for the department that articulates how the Resident Services should be staffed, and how Resident Services staff should interact with all stakeholders including community partners, service providers, property managers, HCV staff and other internal departments.
- Identify key partners to provide services that align with established community goals and our own focus areas. Create a set of expectations for those partners around service delivery and the provision of data that will support their work.
- Determine intentional ways to engage the nearly 13,000 HCV residents across the county and support their participation in our programs.

Staff has created a Resident Services "Theory of Action" that focuses on the key areas of Education, Health and Wellness, Wage Progression. The work will be



led by a manager and supported by "specialist" staff that will coordinate programming in these three areas. Programming will be delivered by partners with relevant expertise in each area. Each program area will have accompanying goals and metrics and regular analysis of the data that will support those goals. A data dashboard will be established as a way to monitor the efforts and facilitate intentional decision-making. Resident Services staff will provide regular reports to the Boards on progress and activities.

Staff will be presenting an overview of the department goals and initial data dashboard at the March Board Meeting.

**Recommendation**

Informational only. No action is required.

**Fiscal Impact**

The Boards of Commissioners approved a request of funds in the amount of \$350 thousand to support the Resident Services Department during the 2015 budget approval process. A specific budget for the department is being refined based on the strategy presented that will not exceed the funds already incorporated in the 2015 Agency Budget.

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F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

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**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince

CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 6c

**AUTHOR:** Juan Lopez

**SUBJECT:** Monthly Report on Housing Quality Standards (HQS)  
Inspections

---

### Executive Summary

The goal of the Housing Choice Voucher (HCV) Program is to provide decent, safe and sanitary housing at an affordable cost to low-income families. To accomplish this, program regulations set forth basic HQS which all units must meet before assistance can be paid on behalf of a family, and at least annually throughout the term of the assisted tenancy. HQS defines standard housing and establishes the minimum criteria necessary for the health and safety of HCV Program participants.

### Statistical Information

The following is some statistical information regarding the Fresno Housing Authority's 2014 HCV HQS activities.

1. We performed over 30,000 annual and initial inspections
  - 62.2% of these inspections passed and were in compliance with HQS
  - This 2014 pass rate was nearly identical to the 2013 pass rate
2. These inspections were conducted in over 12,400 units
  - 69% of the units were multi-family dwellings
    - The average age of these units was 37 years (built in 1977)
  - 31% were single-family dwellings
    - The average age of these units was 51 years (built in 1963)
  - The average age of all units was 41 years (built in 1973)

3. The table below shows the average age of the units in the HCV program's most populous zip codes (minimum 100 units). We can glean some general housing trends and information from this table:
- Fresno's oldest zip code, 93728, represents the Tower District
  - Zip codes 93701, 93702, 93704 and 93721 represent the southern, urban areas of Fresno that we know to be fairly aged compared to newer development areas
  - Much of the newer development in Fresno City has occurred on the edges of town, mostly in the 93722, 93725 and 93727 zip codes.

<b>City</b>	<b>Zip</b>	<b>Avg Age</b>	<b>Avg Year Built</b>
Fresno	93722	27	1987
Fresno	93725	28	1986
Sanger	93657	34	1980
Selma	93662	35	1979
Fresno	93727	36	1978
Clovis	93612	38	1976
Fresno	93705	41	1973
Fresno	93710	42	1972
Fresno	93706	45	1969
Fresno	93726	46	1968
Fresno	93703	46	1968
Fresno	93721	52	1962
Fresno	93704	53	1961
Fresno	93702	56	1958
Fresno	93701	59	1955
Fresno	93728	66	1948
<i><b>Average</b></i>		<b>42</b>	<b>1972</b>

4. The table below shows the pass rate for the most populous zip codes, sorted highest to lowest. The dark highlighted zip codes were the five “youngest” zip codes in the previous table and the light highlighted zip codes were the five oldest zip codes from the previous table.

City	Zip	Avg Age	Avg Year Built	Pass Rate
Selma	93662	35	1979	72.5%
Clovis	93612	38	1976	71.2%
Fresno	93725	28	1986	67.5%
Sanger	93657	34	1980	67.0%
Fresno	93727	36	1978	64.9%
Fresno	93722	27	1987	63.2%
Fresno	93705	41	1973	63.2%
Fresno	93726	46	1968	62.0%
Fresno	93710	42	1972	61.6%
Fresno	93703	46	1968	61.1%
Fresno	93704	53	1961	59.7%
Fresno	93706	45	1969	58.7%
Fresno	93702	56	1958	58.0%
Fresno	93728	66	1948	55.1%
Fresno	93721	52	1962	54.7%
Fresno	93701	59	1955	52.0%
<i>Average</i>		42	1972	62.2%

The 93612 zip code (Clovis) had a relatively high pass rate, given the relatively old age of its housing stock. Conversely, the 93706 zip code (Fresno) had a relatively low pass rate given its relatively young age of housing stock.

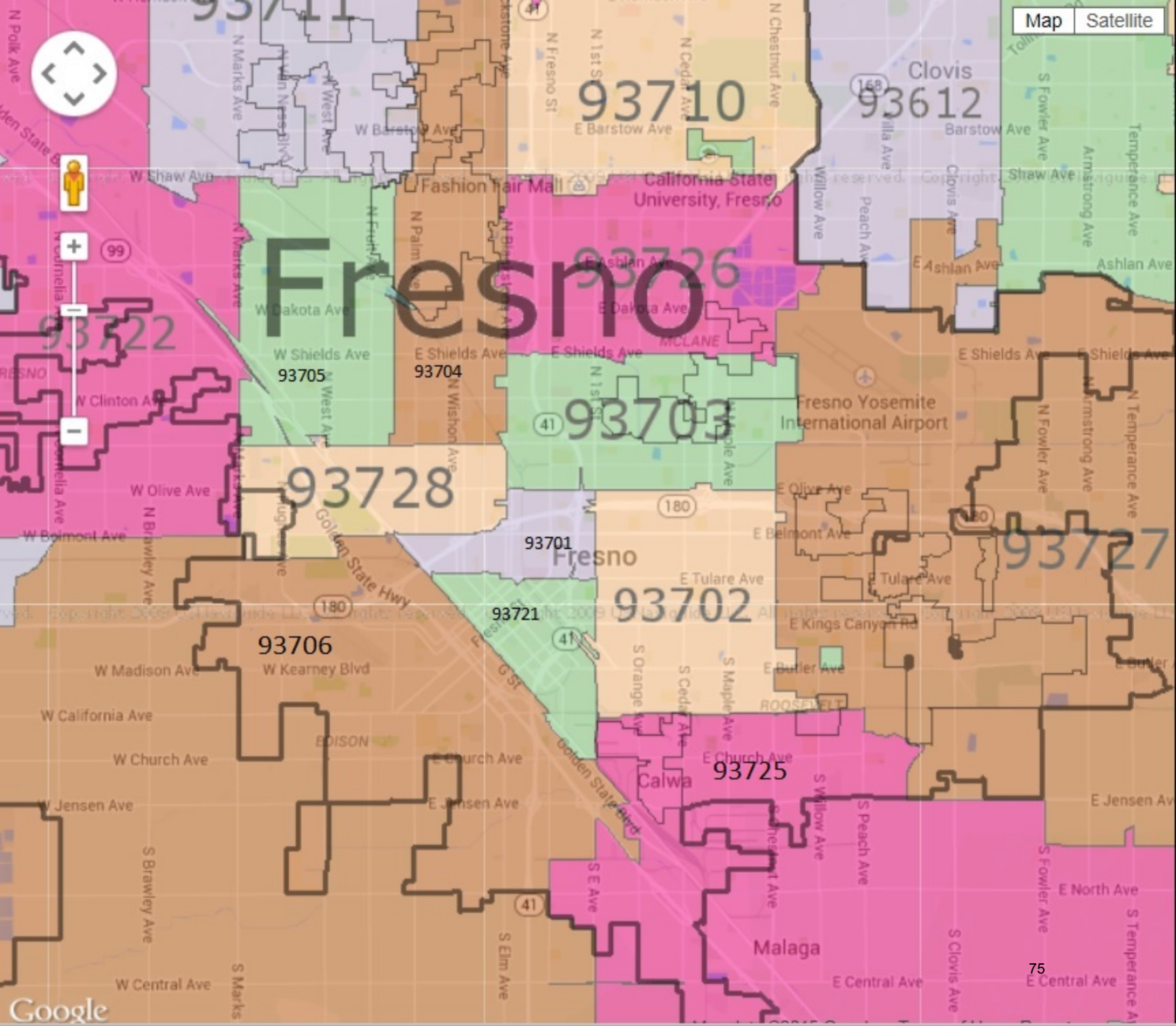
5. The table below shows the six zip codes with the highest pass rates and the six zip codes with the lowest pass rates (taken from the previous table) as well as the composition and age of the housing stock. The composition of the housing stock is shown as a percentage of multi-family (M-F%) and single-family (S-F%) along with the average year built and age of that type of housing within the zip code.

City	Zip	Pass Rate	Housing Composition					
			M-F%	Avg Year	Avg Age	S-F%	Avg Year	Avg Age
Selma	93662	72.50%	72.5%	1981	33	27.5%	1970	44
Clovis	93612	71.20%	87.1%	1977	37	12.9%	1969	45
Fresno	93725	67.50%	52.6%	1997	17	47.4%	1973	41
Sanger	93657	67.00%	47.4%	1981	33	52.6%	1978	36
Fresno	93727	64.90%	79.9%	1981	33	20.1%	1973	41
Fresno	93722	63.20%	64.5%	1987	27	35.5%	1987	27
<i>Average</i>			67.3%	1984	30	32.7%	1975	39
Fresno	93704	59.70%	62.2%	1967	47	37.8%	1952	62
Fresno	93706	58.70%	41.8%	1986	28	58.2%	1957	57
Fresno	93702	58.00%	43.3%	1974	40	56.7%	1946	68
Fresno	93728	55.10%	54.2%	1958	56	45.8%	1937	77
Fresno	93721	54.70%	87.0%	1963	51	13.0%	1950	64
Fresno	93701	52.00%	64.1%	1962	52	35.9%	1942	72
<i>Average</i>			58.8%	1968	46	41.2%	1947	67

In analyzing the summaries of the two groups, we can see that the average age difference between the multi-family units of the two groups is about 16 years. An even bigger variance is the age of single-family units at 28 years. This age gap has a significant effect on the ~11.3% variance between the average pass rates of the two groups.

### Recommendation

This item is informational only. No action is necessary.



## BOARD MEMO

O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 6d

**AUTHOR:** Tiffany Mangum

**SUBJECT:** Fresno Housing 75<sup>th</sup> Overview

---

### Executive Summary

The Fresno Housing 75<sup>th</sup> Overview presentation will include the discussion and outline of the comprehensive plan in celebrating the 75<sup>th</sup> anniversary of Fresno Housing, as well as, some of the goals established for the year in the areas of communications, strategic outreach, resident engagement, and public engagement, information, and advocacy, for the work and programs of the agency.

### Recommendation

No action at this time. Information only.

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O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

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**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince



CEO/Executive Director

**DATE:** March 20, 2015

**BOARD MEETING:** March 24, 2015

**AGENDA ITEM:** 7a

**AUTHOR:** Richard Bradley

**SUBJECT:** 2015 Capital Budget Adoption

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### Executive Summary

On an annual basis, the Housing Management Division prepares a comprehensive list of the capital improvements needed for the Low Income Public Housing and Specialty Housing. From this list, the needs are prioritized based on staff resources available, current year priorities, and the following principals:

- Resident safety
- Compliance with relevant codes
- REAC Preparation
- Maintainability and long-term sustainability
- Property marketability

Capital expenditures are generally funded through two main funding streams – Operating Reserves and Capital Funds. Operating Reserve funds are generated by yearly program savings, some of which can be used for capital projects. Additionally, the Low-Income Public Housing (LIPH) Operating Reserves can be used for budget off-sets, when AMP budgets have a short-fall in operating funds. Capital Funds are yearly HUD formula grants used for LIPH Capital Improvements and Management Improvements for the AMPs. Capital Funds have a two-year encumbrance deadline and a four-year expenditure deadline. Listed below are the proposed expenditures for 2015.

The proposed program expenditures are listed as follows. Additionally, a spreadsheet detailing the proposed projects at each property is attached. Approval to use reserves for specialty housing properties is obtained from respective funding agencies prior to procuring.



**Proposed Expenditures**

	<b>Current Operating Reserve Balance</b>	<b>Proposed 2015 Operating Reserve Expenditures</b>	<b>Current &amp; Projected Capital Fund Balance</b>	<b>Proposed 2015 Capital Fund Expenditures</b>
City AMP's	2,087,738	-	1,453,164	85,979
County AMP's	1,887,448	-	2,108,639	166,800
<b>Total LIPH</b>	<b>3,975,186</b>	<b>-</b>	<b>3,561,803</b>	<b>252,779</b>
Firebaugh Family	549,906	75,678	-	-
Farm Labor	2,051,904	240,000	-	-
Maldonado Plaza	123,102	115,886	-	-
<b>Total Specialty Housing</b>	<b>2,724,912</b>	<b>431,564</b>	<b>-</b>	<b>-</b>
<b>Grand Total</b>	<b>6,700,098</b>	<b>431,564</b>	<b>3,561,803</b>	<b>252,779</b>

Capital Funds and operating Reserves for LIPH are also acceptable sources of financing for RAD projects. Staff anticipates utilizing some of these funds for RAD conversions in the coming year.

**Recommendation**

It is recommended that the Board of Commissioners of the Fresno Housing Authority adopt the proposed FY 2015 Capital Budget.

**Fiscal Impact**

There are sufficient operating reserves available at the properties to move forward with identified projects. Capital Fund dollars may only be spent on improvements to our public housing portfolio and therefore have a net zero impact on the Agency's unrestricted reserve level.

RESOLUTION NO. \_\_\_\_\_

BEFORE THE BOARDS OF COMMISSIONERS OF THE

HOUSING AUTHORITIES OF THE CITY OF FRESNO

RESOLUTION ADOPTING THE 2015 ANNUAL CAPITAL BUDGET

WHEREAS, the Annual Capital Budget for the Fresno Housing Authority for the fiscal year beginning January 1, 2015 and ending December 31, 2015 has been presented for adoption before the Boards of Commissioners of the Fresno Housing Authority at its open public meeting on March 24, 2015; and

WHEREAS, capital expenditures are comprised of two main categories – Housing Management Operating Reserve and Capital Fund; and

WHEREAS, there are sufficient operating reserves within Housing Management to move forward with identified projects, and Capital Fund dollars may only be spent on improvements to the public housing portfolio and have a net zero impact on the Housing Authority's unrestricted reserve level; and

WHEREAS, the Annual Capital Budget as presented for adoption reflects proposed expenditures of \$431,564.00 from the Housing Management Operating Reserve and \$252,779.00 proposed expenditures from Capital Funds.

NOW THEREFORE, BE IT RESOLVED that the Boards of Commissioners of the Fresno Housing Authority adopt the 2015 Annual Capital Budget as presented.

PASSED AND ADOPTED THIS 24<sup>th</sup> DAY OF MARCH, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

RESOLUTION NO. \_\_\_\_\_

BEFORE THE BOARDS OF COMMISSIONERS OF THE  
HOUSING AUTHORITIES OF FRESNO COUNTY

RESOLUTION ADOPTING THE 2015 ANNUAL CAPITAL BUDGET

WHEREAS, the Annual Capital Budget for the Fresno Housing Authority for the fiscal year beginning January 1, 2015 and ending December 31, 2015 has been presented for adoption before the Boards of Commissioners of the Fresno Housing Authority at its open public meeting on March 24, 2015; and

WHEREAS, capital expenditures are comprised of two main categories – Housing Management Operating Reserve and Capital Fund; and

WHEREAS, there are sufficient operating reserves within Housing Management to move forward with identified projects, and Capital Fund dollars may only be spent on improvements to the public housing portfolio and have a net zero impact on the Housing Authority's unrestricted reserve level; and

WHEREAS, the Annual Capital Budget as presented for adoption reflects proposed expenditures of \$431,564.00 from the Housing Management Operating Reserve and \$252,779.00 proposed expenditures from Capital Funds.

NOW THEREFORE, BE IT RESOLVED that the Boards of Commissioners of the Fresno Housing Authority adopt the 2015 Annual Capital Budget as presented.

PASSED AND ADOPTED THIS 24<sup>th</sup> DAY OF MARCH, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

---

Preston Prince, Secretary of the Boards of Commissioners

## 2015 CAPITAL FUND CAPITAL EXPENDITURE BUDGET

PROJECT DESCRIPTION	OPERATING RESERVE EXPENDITURES	CAPITAL FUND EXPENDITURES	TOTAL 2015 EXPENDITURES
<b>City AMP 1</b>			
Tree Trimming and Removal			
Replace Swamp Cooler Valves			
Sequoia Courts Community Bldg. Renovation			
Replace Electrical Breakers			
Repair Termite Damage			
Replace Kitchen Faucets			
Asphalt Patching & Seal			
Sidewalk and Concrete Work			
Replace HW Heater Dooors			
<b>Total City AMP 1</b>	<b>\$0</b>	<b>\$30,330</b>	<b>\$30,330</b>
<b>City AMP 2</b>			
Tree Trimming and Removal			
Replace Common Bldg. HVAC at Fairview			
Replace HW Heaters			
Replace Swamp Cooler Valves			
Replace Mailboxes			
Replace Porch Posts			
Asphalt Patching & Seal			
Sidewalk and Concrete Work			
<b>Total City AMP 2</b>	<b>\$0</b>	<b>\$55,649</b>	<b>\$55,649</b>
<b>Total City AMP's</b>	<b>\$0</b>	<b>\$85,979</b>	<b>\$85,979</b>

## 2015 CAPITAL FUND CAPITAL EXPENDITURE BUDGET

	PROJECT DESCRIPTION	OPERATING RESERVE EXPENDITURES	CAPITAL FUND EXPENDITURES	TOTAL 2015 EXPENDITURES
<b>County AMP 1</b>	Tree Trimming and Removal Exterior Lighting Fencing Replace Electrical Subpanels Replace Mailboxes Replace Kitchen Drain Pipes			
<b>Total County AMP 1</b>		<b>\$0</b>	<b>\$47,500</b>	<b>\$47,500</b>
<b>County AMP 2</b>	Tree Trimming and Removal Replace Wall Heaters Sidewalk and Concrete Work Landscaping			
<b>Total County AMP 2</b>		<b>\$0</b>	<b>\$24,450</b>	<b>\$24,450</b>
<b>County AMP 3</b>	Tree Trimming and Removal Sidewalk and Concrete Work Landscaping			
<b>County AMP 3</b>		<b>\$0</b>	<b>\$14,850</b>	<b>\$14,850</b>

## 2015 CAPITAL FUND CAPITAL EXPENDITURE BUDGET

	PROJECT DESCRIPTION	OPERATING RESERVE EXPENDITURES	CAPITAL FUND EXPENDITURES	TOTAL 2015 EXPENDITURES
<b>County AMP 4</b>	Tree Trimming and Removal Replace Shut Off Valves Sewer Line Repairs Landscaping Sidewalk and Concrete Work Parking Lot Patch & Seal			
<b>Total County AMP 4</b>		<b>\$0</b>	<b>\$37,450</b>	<b>\$37,450</b>
<b>County AMP 5</b>	Tree Trimming and Removal Sidewalk and Concrete Work Landscaping			
<b>Total County AMP 5</b>		<b>\$0</b>	<b>\$12,400</b>	<b>\$12,400</b>
<b>County AMP 6</b>	Tree Trimming and Removal Landscaping Sidewalk and Concrete Work			
<b>Total County AMP 6</b>		<b>\$0</b>	<b>\$30,150</b>	<b>\$30,150</b>
<b>Total County AMPs</b>		<b>\$0</b>	<b>\$166,800</b>	<b>\$166,800</b>
<b>Total Public Housing</b>		<b>\$0</b>	<b>\$252,779</b>	<b>\$252,779</b>

## 2015 CAPITAL FUND CAPITAL EXPENDITURE BUDGET

PROJECT DESCRIPTION	OPERATING RESERVE EXPENDITURES	CAPITAL FUND EXPENDITURES	TOTAL 2015 EXPENDITURES
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## 2015 SPECIALITY HOUSING RESERVE EXPENDITURE BUDGET

PROJECT DESCRIPTION	OPERATING RESERVE EXPENDITURES	CAPITAL FUND EXPENDITURES	TOTAL 2014 EXPENDITURES
---------------------	-----------------------------------	------------------------------	-------------------------

### Firebaugh Family

Lighting Replacements  
 Replace Roofs  
 Paint Exterior  
 Landscaping  
 Repair/Replace Porches  
 Sidewalk and Concrete Work

<b>Total Firebaugh Family</b>	<b>\$75,678</b>	<b>\$0</b>	<b>\$75,678</b>
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### Farm Labor

Replace countertops  
 Sidewalk and Concrete Work  
 Replace HVAC's  
 Replace Roofs  
 Replace Appliances  
 Replace Windows  
 Asphalt Patching & Seal  
 Replace Kitchen Cabinets

<b>Total Farm Labor</b>	<b>\$240,000</b>	<b>\$0</b>	<b>\$240,000</b>
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## 2015 CAPITAL FUND CAPITAL EXPENDITURE BUDGET

PROJECT DESCRIPTION	OPERATING RESERVE EXPENDITURES	CAPITAL FUND EXPENDITURES	TOTAL 2015 EXPENDITURES
<hr/>			
<b>Maldonado Plaza</b>			
Replace Scuppers			
Repair Siding			
replace Appliances			
Replace Swamp Coolers			
Asphalt Patching & Seal			
Sidewalk and Concrete Work			
<b>Total Maldonado Plaza</b>	<b>\$115,886</b>	<b>\$0</b>	<b>\$115,886</b>
<hr/>			
<b>Total Speciality Housing</b>	<b>\$431,564</b>	<b>\$0</b>	<b>\$431,564</b>
<hr/>			
<b>Grand Total LIPH and Speciality Housing</b>	<b>\$431,564</b>	<b>\$252,779</b>	<b>\$684,343</b>



## BOARD MEMO

O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

**TO:** Boards of Commissioners

Fresno Housing Authority

**FROM:** Preston Prince

CEO/Executive Director

**DATE:** Mar. 20, 2015

**BOARD MEETING:** Mar. 24, 2015

**AGENDA ITEM:** 7b

**AUTHOR:** Michael van Putten

**SUBJECT:** 2014 Financial Results for Agency Operations and Housing Assistance Payments

### Executive Summary

The purpose of this memo is to inform the Boards of Commissioners regarding the Agency's financial performance in 2014. The attached budget represents the revenues and expenses for the Fresno Housing Authority by program, department, and division. This budget is a consolidation of 79 programmatic budgets combined into five Agency divisions. Each budget, separately and together as a whole, is intended to ensure that the Agency remains in a strong financial position while investing in its future, and delivering services in accordance with our mission.

In 2014, the Fresno Housing Authority operated above budgeted levels, accruing 4.6% higher revenues and 2% lower operating expenses. Although many factors contributed to the Agency's final financial position, there are a few key features which should be called to attention.

	2014 Budget	2014 Financial Results	2014 Financial Results to 2014 Budget	
	Total	Total		
<b>INCOME</b>				
ADMIN & MANAGEMENT FEES	13,864,294	14,231,510	367,216	2.6%
RENTAL INCOME	6,509,705	6,425,863	(83,843)	-1.3%
HUD GRANTS	4,265,565	5,561,412	1,295,848	30.4%
MISCELLANEOUS	7,615,279	7,746,345	131,065	1.7%
GRANT FUNDING (Non-HUD)	2,531,477	2,487,206	(44,272)	-1.7%
SOFTWARE, EQUIP & OCCUPANCY	1,703,581	1,704,983	1,402	0.1%
SALES OF INVESTMENTS/ASSETS	-	19,341	19,341	
INTERNAL EQUITY TRANSFER	-	-	-	
<b>Total Income:</b>	<b>36,489,902</b>	<b>38,176,659</b>	<b>1,686,758</b>	<b>4.6%</b>
<b>EXPENSES</b>				
Salaries & Benefits	13,828,774	14,029,780	201,006	1.5%
Administrative Overhead	14,501,717	14,312,922	(188,795)	-1.3%
Fleet & Facilities	4,570,749	4,320,817	(249,933)	-5.5%
TRAVEL, TRAINING, STAFF DEVELOPMENT	485,864	413,900	(71,964)	-14.8%
Other	924,502	552,868	(371,634)	-40.2%
<b>Total Expenses:</b>	<b>34,311,606</b>	<b>33,630,287</b>	<b>(681,320)</b>	<b>-2.0%</b>
<b>Net Operating Income:</b>	<b>2,178,295</b>	<b>4,546,373</b>	<b>2,368,078</b>	<b>108.7%</b>
<b>Unrestricted Funds</b>	<b>1,077,687</b>	<b>1,368,730</b>	<b>291,043</b>	<b>27.0%</b>

Looking at revenue, the Agency received 30.4% more funds in the form of restricted, public housing HUD grants in 2014 than was anticipated. The vast majority of this money went to fund the County AMP's which received \$3.29 million instead of \$1.99 million, an increase of 65% over the budgeted amount. This was partially due to revenue for the RAD projects that was subsequently passed thru as an expense. Staff originally budgeted for the RAD revenue to be received by the limited partnership; instead the properties were funded through public housing.

Another component of the revenue variance is slightly higher proration levels for public housing. Staff originally budgeted 87% proration for 2014, and we actually received about 89% proration for the year. Of the \$1.69 million increase to the Agency's total income in 2014, \$1.3 million of that came in the form of HUD grants, which is restricted for public housing purposes. The other \$400 thousand is mainly attributable to the sale of assets within Core, as well as increased admin fees within Core and Instrumentalities divisions.

As for expenditures, by operating conservatively, the Agency was able to reduce our total budgetary expenses for 2014 by \$681k. The biggest savings were found under the Planning & Development (P&CD) division where we saved \$127k on non-capitalizable project costs and \$70k on debt related costs (both of which fall under the "Other" category above). This is attributable to the close out of the Neighborhood Stabilization Program and the Sierra Pointe project. Staff originally budgeted to spend some dollars on these programs during 2014, but expenses have been minimal. The second biggest savings, under "Fleet & Facilities", was primarily the result of lower than budgeted utilities expenditures within the Housing Management (HSM) division.

The net result is an increased ending reserve balance of \$2.94 million compared to a budgeted ending balance of \$2.65 million. See below for details:

2014 Budget		2014 Financial Results	
Budgeted Unrestricted Reserve Gain(Loss)	1,077,687	Final Unrestricted Reserve Gain(Loss)	1,368,730
Unrestricted Reserve Balance as of 12/31/13	1,570,359	Unrestricted Reserve Balance as of 12/31/13	1,570,359
<b>Ending Unrestricted Reserve Balance</b>	<b>2,648,046</b>	<b>Ending Unrestricted Reserve Balance</b>	<b>2,939,089</b>

While the final unrestricted net gain for 2014 is better than originally budgeted, it is approximately \$220 thousand less than what was projected based on the September 30<sup>th</sup> financial results. At that time, staff estimated the Agency would retain approximately \$1.59 million in unrestricted reserves during 2014. This difference is mainly attributable to losses in the Housing Choice Voucher program stemming from revenue adjustments and delayed expenditures within the department.

- On the revenue side, HUD advanced the Agency additional Administrative Fees that were not actually earned during the year, therefore staff was required to make a year-end adjustment to modify the amount (\$250 thousand).
- On the expense side, there were several expenditures attributable to the year-end lease-up that were paid in the third quarter including additional staff time (\$250 thousand) and administrative contracts (\$90 thousand).

- These items combined for an additional \$600 thousand dollar loss between September and December 2014.

Expense savings during the third quarter of 2014 in the Planning and Development department allowed to Agency to realize the unrestricted net gain for the year of \$1.37 million dollars, as shown on your final 2014 financial results.

### Housing Assistance Payments

The Housing Assistance Payments subsidize landlords on behalf of participating residents in the Housing Choice Voucher program (formerly “Section 8” department). Due to HUD’s Cash Management policy for the HCV program, as expenses are lowered within the program, so is the total funding. In a perfect world, HUD would only send the exact amount of cash the Agency needs in order to pay the landlords. In the cases where the figures don’t match, the Agency has HAP reserves available to cover any deficits.

	2014 Budget	2014 Financial Results	2014 Financial Results to 2014 Budget	
	Total	Total		
<b>HAP BUDGET</b>				
<b>HAP RENTAL ASSISTANCE</b>	<b>80,592,545</b>	<b>76,964,630</b>	(3,627,915)	-4.5%
<b>HAP PAYMENTS</b>	<b>80,418,626</b>	<b>77,056,476</b>	(3,362,151)	-4.2%
Restricted earnings:	173,919	(91,846)	(265,765)	-152.8%

### Recommendation

Staff recommends that the Boards of Commissioners accept the 2014 financial results for Agency Operations and Housing Assistance Payments.

**BEFORE THE BOARD OF COMMISSIONERS OF THE  
HOUSING AUTHORITY OF THE CITY OF FRESNO**

**RESOLUTION NO: \_\_\_\_\_**

**RESOLUTION ACCEPTING THE 2014 HOUSING AUTHORITY'S FINANCIAL RESULTS AND THE  
2014 HOUSING ASSISTANCE PAYMENTS**

WHEREAS, the Annual Operating Financial Results and the Housing Assistance Payments Financial Results for the Fresno Housing Authority for the fiscal year beginning January 1, 2014 and ending December 31, 2014 has been presented for acceptance before the Board of Commissioners of the Housing Authority of the City of Fresno at its open public meeting on March 24, 2015; and

WHEREAS, the Annual Operating Financial Results as presented for acceptance reflects total revenues of \$38,176,659 and total expenses of \$33,630,287; and

WHEREAS, in 2014 the Agency operated above budgeted levels, accruing 4.6% higher revenues and 2% lower operating expenses; and

WHEREAS, the Housing Assistance Payments Financial Results as presented for acceptance reflects total revenues of \$76,964,630 and total expenses of \$77,056,476; and

NOW THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of the City of Fresno accept the Annual Operating Financial Results and the Housing Assistance Payments Financial Results beginning on January 1, 2014 and ending on December 31, 2014.

PASSED AND ACCEPTED THIS 24<sup>th</sup> day of March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly accepted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSTAIN:

ABSENT:

---

Preston Prince, Secretary of the Boards of Commissioners

**BEFORE THE BOARD OF COMMISSIONERS OF THE  
HOUSING AUTHORITY OF FRESNO COUNTY**

**RESOLUTION NO: \_\_\_\_\_**

**RESOLUTION ACCEPTING THE 2014 HOUSING AUTHORITY'S FINANCIAL RESULTS AND THE  
2014 HOUSING ASSISTANCE PAYMENTS**

WHEREAS, the Annual Operating Financial Results and the Housing Assistance Payments Financial Results for the Fresno Housing Authority for the fiscal year beginning January 1, 2014 and ending December 31, 2014 has been presented for acceptance before the Board of Commissioners of the Housing Authority of Fresno County at its open public meeting on March 24, 2015; and

WHEREAS, the Annual Operating Financial Results as presented for acceptance reflects total revenues of \$38,176,659 and total expenses of \$33,630,287; and

WHEREAS, in 2014 the Agency operated above budgeted levels, accruing 4.6% higher revenues and 2% lower operating expenses; and

WHEREAS, the Housing Assistance Payments Financial Results as presented for acceptance reflects total revenues of \$76,964,630 and total expenses of \$77,056,476; and

NOW THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of Fresno County accept the Annual Operating Financial Results and the Housing Assistance Payments Financial Results beginning on January 1, 2014 and ending on December 31, 2014.

PASSED AND ACCEPTED THIS 24<sup>th</sup> day of March, 2015. I, the undersigned, hereby certify that the foregoing Resolution was duly accepted by the governing body with the following vote, to-wit:

AYES:

NOES:

ABSTAIN:

ABSENT:

\_\_\_\_\_  
Preston Prince, Secretary of the Boards of Commissioners

2014 Budget								2014 Financial Results							2014 Financial Results to 2014 Budget	
	Core	Inst	P&CD	AHD	HSM	Aff	Total	Core	Inst	P&CD	AHD	HSM	Aff	Total		
HAP BUDGET																
HAP RENTAL ASSISTANCE				80,592,545			80,592,545	-	-	-	76,964,630	-	-	76,964,630	(3,627,915)	-4.5%
HAP PAYMENTS				80,418,626			80,418,626	-	-	-	77,056,476	-	-	77,056,476	(3,362,151)	-4.2%
Restricted earnings:	-	-	-	173,919	-	-	173,919	-	-	-	(91,846)	-	-	(91,846)	(265,765)	-152.8%
OPERATING BUDGET																
INCOME																
ADMIN & MANAGEMENT FEES	5,106,542	-	-	8,154,704	603,048	-	13,864,294	5,344,587	21,884	-	8,320,658	544,381	-	14,231,510	367,216	2.6%
RENTAL INCOME	-	-	-	412,878	4,449,196	1,647,631	6,509,705	-	-	-	-	4,741,218	1,684,645	6,425,863	(83,843)	-1.3%
HUD GRANTS	-	-	-	396,271	3,869,294	-	4,265,565	-	-	-	307,574	5,253,838		5,561,412	1,295,848	30.4%
MISCELLANEOUS	1,344,775	1,085,684	4,275,747	402,767	479,281	27,025	7,615,279	1,475,416	1,925,037	2,774,657	714,301	828,420	28,514	7,746,345	131,065	1.7%
GRANT FUNDING (Non-HUD)	-	-	-	773,334	1,758,143	-	2,531,477	-	-	-	538,811	1,948,395	-	2,487,206	(44,272)	-1.7%
SOFTWARE, EQUIP & OCCUPANCY	1,703,581	-	-	-	-	-	1,703,581	1,704,983	-	-	-	-	-	1,704,983	1,402	0.1%
SALES OF INVESTMENTS/ASSETS	-	-	-	-	-	-	-	19,341	-	-	-	-	-	19,341	19,341	
INTERNAL EQUITY TRANSFER							-	-	-	-	-	-	-	-	-	
Total Income:	8,154,898	1,085,684	4,275,747	10,139,954	11,158,962	1,674,656	36,489,902	8,544,327	1,946,921	2,774,657	9,881,344	13,316,252	1,713,159	38,176,659	1,686,758	4.6%
EXPENSES																
SALARIES (inc temps)	2,789,100	156,818	902,047	3,754,175	2,222,270	42,020	9,866,430	2,652,941	108,568	851,419	3,989,365	2,293,528	10,731	9,906,552	40,122	0.4%
BENEFITS & TAXES	677,100	58,249	336,769	1,683,507	1,183,361	23,358	3,962,344	985,498	45,948	319,743	1,617,317	1,151,399	3,324	4,123,229	160,884	4.1%
Salaries & Benefits	3,466,200	215,067	1,238,816	5,437,682	3,405,631	65,378	13,828,774	3,638,439	154,516	1,171,161	5,606,682	3,444,927	14,055	14,029,780	201,006	1.5%
ADMIN, ACCTG, MANAGEMENT, PILOT FEES	-	40,000	-	2,945,590	1,948,679	4,760	4,939,029	-	332,667	-	2,938,638	1,965,259	-	5,236,564	297,535	6.0%
PROFESSIONAL/ADMINISTRATIVE FEES	1,797,696	37,900	1,106,663	371,509	218,464	7,911	3,540,143	1,485,211	87,042	393,378	488,291	747,618	6,149	3,207,690	(332,454)	-9.4%
SOFTWARE, EQUIPMENT & OCCUPANCY	1,074,806	-	143,677	1,161,876	222,362	4,137	2,606,858	1,000,116	-	135,137	972,980	269,922	2,604	2,380,760	(226,098)	-8.7%
OTHER	625,390	221,814	-	943,784	468,981	16,570	2,276,539	679,157	7,904	-	521,644	1,216,130	2,344	2,427,178	150,638	6.6%
OFFICE SUPPLIES, ADVERT., SUBSCRIPTIONS	167,145	-	30,425	227,688	118,012	5,210	548,480	235,478	15,937	20,978	175,985	100,997	3,216	552,591	4,111	0.7%
INSURANCE	17,393	94,000	12,294	17,092	264,922	16,383	422,085	24,650	77,519	5,111	23,530	171,353	24,171	326,335	(95,750)	-22.7%
PAYMENTS TO EXTERNAL PROP MGRS	-	-	-	-	-	168,583	168,583	-	-	-	-	-	181,805	181,805	13,222	7.8%
Administrative Overhead	3,682,430	393,714	1,292,471	5,667,539	3,241,420	223,554	14,501,717	3,424,612	521,069	554,605	5,121,068	4,471,280	220,289	14,312,922	(188,795)	-1.3%
LANDSCAPING, REPAIRS, SECURITY, ETC.	231,150	-	-	-	1,454,978	378,342	2,064,470	192,616	-	-	-	1,454,393	433,332	2,080,341	15,871	0.8%
UTILITIES, GARBAGE, SEWER, ETC.	168,060	-	-	-	1,940,357	171,567	2,279,984	182,691	-	-	-	1,652,505	145,454	1,980,650	(299,333)	-13.1%
AUTO COSTS	19,900	-	17,497	70,245	117,538	1,116	226,296	43,361	1,483	23,272	58,035	132,654	1,021	259,826	33,530	14.8%
Fleet & Facilities	419,110	-	17,497	70,245	3,512,873	551,025	4,570,749	418,668	1,483	23,272	58,035	3,239,552	579,807	4,320,817	(249,933)	-5.5%
TRAVEL, TRAINING, STAFF DEVELOPMENT	333,554	-	51,246	61,759	38,420	884	485,864	276,429	2,452	21,503	87,774	25,628	114	413,900	(71,964)	-14.8%
NON-CAPITALIZABLE PROJECT COSTS	-	-	131,525	-	-	-	131,525	-	-	4,481	-	-	-	4,481	(127,044)	-96.6%
DEBT RELATED COSTS	-	-	70,000	-	336,325	386,652	792,977	-	-	-	9,351	224,624	314,412	548,387	(244,590)	-30.8%
Other	-	-	201,525	-	336,325	386,652	924,502	-	-	4,481	9,351	224,624	314,412	552,868	(371,634)	-40.2%
Total Expenses:	7,901,294	608,781	2,801,555	11,237,226	10,534,669	1,227,493	34,311,606	7,758,148	679,519	1,775,022	10,882,910	11,406,011	1,128,676	33,630,287	(681,320)	-2.0%
Net Operating Income:	253,604	476,903	1,474,192	(1,097,272)	624,293	447,163	2,178,295	786,178	1,267,402	999,635	(1,001,566)	1,910,241	584,482	4,546,373	2,368,078	108.7%
Unrestricted Funds	253,604	-	1,474,192	(1,097,272)	-	447,163	1,077,687	786,178	-	999,635	(1,001,566)	-	584,482	1,368,730	291,043	27.0%

Budgeted Unrestricted Reserve Gain/(Loss)	1,077,687
Unrestricted Reserve Balance as of 12/31/13	1,570,359
Ending Unrestricted Reserve Balance	2,648,046

Budgeted Unrestricted Reserve Gain/(Loss)	1,368,730
Projected Unrestricted Reserve Balance as of 12/31/1	1,570,359
Ending Unrestricted Reserve Balance	2,939,089


O (559) 443-8400  
F (559) 445-8981

1331 Fulton Mall  
Fresno, California 93721  
TTY (800) 735-2929

[www.fresnohousing.org](http://www.fresnohousing.org)

## EXECUTIVE DIRECTOR'S REPORT

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**TO:** Boards of Commissioners **DATE:** March 20, 2015  
Fresno Housing Authority **BOARD MEETING:** March 24, 2015  
**FROM:** Preston Prince  **AGENDA ITEM:** 8  
CEO/Executive Director **AUTHOR:** Staff  
**SUBJECT:** Executive Director's Report – March 2015

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### Executive Summary

The Boards of the Fresno Housing Authority have established the four strategic goals as: Place, People, Public, and Partnership. In addition, the following have been outlined as the management goals: Sustainability, Structure, and Strategic Outreach. The following report demonstrates the efforts of the Executive Leadership and Staff to progress towards the realization of these goals.

### PLACE

#### Overview

*Fresno Housing seeks to develop and expand the availability of quality affordable housing options throughout the City and County of Fresno by growing and preserving appropriate residential assets and increasing housing opportunities for low-income residents.*

The matrix below outlines the Development Pipeline and status of each project.

#### Development Project Overview

Name of Property	Status	Description/Type	Total Units
Southeast Fresno RAD	Rehab Underway	Cedar Courts I & II, Inyo Terrace Multi-Family	193
Orange Cove RAD	Rehab Underway	Kuffel Terrace I & II, Mountain View Multi-Family	90
Mendota RAD	Rehab Underway	Rios Terrace I & II, Mendota Apts. Multi-Family	124

Name of Property	Status	Description/Type	Total Units
Viking Village RAD	Rehab Underway	Multi-Family	40
City View @ Van Ness (formerly Droge)	Lease Up	802 Van Ness Ave Mixed-Use	45 Units/ 3,000 sf commercial
Parc Grove Commons Northwest	Stabilization	Southeast Corner of Fresno/Clinton Ave Multi-Family	148
Marion Villas	Under Construction	Marion & Ellis St, Kingsburg, CA Senior Housing	46
Kings River Commons	Stabilization	2020 E. Dinuba Ave, Reedley, CA Muti-family	60
Bridges at Florence	Stabilization	649 E. Florence Avenue Senior Housing	34
San Ramon Court	Stabilization	1328 & 1346 E. San Ramon Rehab/Multi-Family	32
Fulton West/Cedar Heights Scattered Site	Under Construction	541 N. Fulton Street and 4532 E. Hamilton Ave Multi-Family	45
Trailside Terrace	Pre-Development	1233 & 1245 G Street, Reedley, CA	55
Firebaugh Gateway	Pre-Development	1238 & 1264 P St., Firebaugh, CA	30
Lowell Neighborhood	Pre-Development	240-250 N. Calaveras & 146 N. Glenn, Fresno	30
Edison Plaza I	Pre-Development	Walnut/Edison West Fresno	64

### Project Highlights

- The Fulton West/Cedar Heights project was financed on March 17, 2015. Permits have been pulled and a Notice to Proceed has been issued to Brown Construction with a construction start date of March 23, 2015.
- The Trailside Terrace project was awarded \$1,000,000 in Fresno County HOME funds, contingent on an award of tax credits.



- Staff submitted three 9% tax credit applications on March 4, 2015 for Trailside Terrace, Firebaugh Gateway, and Edison Plaza I.
- The Viking Village site is complete with construction. All tenants have returned to their rehabilitated units, and final touchup items are being completed on the site and community building.

<b>February City Occupancy    <u>92.50%</u></b>					
<b>CITY</b>	<b>No of Properties</b>	<b>Physical Units</b>	<b>Rentable Units</b>	<b>Vacant Units</b>	<b>Occupancy Percentage</b>
City AMP 1	3	182	179	3	98%
City AMP 2	8	251	245	5	98%
Southeast Fresno RAD	3	193	191	50	74%
Viking Village RAD	1	40	39	2	95%
Pacific Gardens	1	56	55	0	100%
Renaissance Trinity	1	21	20	0	100%
Renaissance Alta Monte	1	30	29	0	100%
Renaissance Santa Clara	1	70	69	2	97%
<b>Total City</b>	<b>19</b>	<b>843</b>	<b>827</b>	<b>62</b>	<b>92.50%</b>

<b>February City Occupancy (GSF Managed)    <u>97.20%</u></b>					
Parc Grove	1	215	213	9	95.8%
Parc Grove - NW	1	148	147	3	98.0%
Yosemite Village	1	69	68	0	100.0%
<b>Total City</b>	<b>3</b>	<b>432</b>	<b>428</b>	<b>12</b>	<b>97.20%</b>

<b>February County Occupancy 98.14%</b>					
COUNTY	No of Properties	Physical Units	Rentable Units	Vacant Units	Occupancy Percentage
County AMP 1	6	151	143	1	99%
County AMP 2	6	194	192	3	98%
County AMP 3*	3	90	89	4	96%
County AMP 4	4	152	151	5	97%
County AMP 5*	2	52	52	0	100%
County AMP 6	5	112	111	1	99%
Granada Commons	1	16	15	0	100%
<b>Total County</b>	<b>27</b>	<b>767</b>	<b>753</b>	<b>14</b>	<b>98.14%</b>

<b>February County RAD Occupancy 86.4%</b>					
SITE	No of Properties	Physical Units	Rentable Units	Vacant Units	Occupancy Percentage
Mendota RAD	1	124	123	24	80.5%
Orange Cove RAD	1	90	68	2	97.1%
<b>Total County RAD</b>	<b>2</b>	<b>214</b>	<b>191</b>	<b>26</b>	<b>86.39%</b>

<b>February Special Programs Occupancy 96.07%</b>					
SPECIAL PROGRAMS	No of Properties	Physical Units	Rentable Units	Vacant Units	Occupancy Percentage
Mariposa Farm Labor	1	40	40	3	93%
Parlier Farm Labor	1	40	40	2	95%
Orange Cove Farm Labor	1	30	30	2	93%
Mendota Farm Labor	1	60	60	0	100%
Firebaugh Family Apts.	1	34	34	1	97%
Garland Gardens (CalHFA)	1	51	51	3	94%
Parkside Apartments (CalHFA)	1	50	50	1	98%
<b>Total Special Programs</b>	<b>7</b>	<b>305</b>	<b>305</b>	<b>12</b>	<b>96.07%</b>

**Note:** Both Migrant Centers are closed for the season.

### **Housing Choice Voucher (HCV) Utilization & Leasing Activity**

**Date Range: 2/1/15 – 2/25/15**

<b>Current Month Status</b>						<b>YTD</b>		
Program	Current Waiting List	Applicants Pulled	New Vouchers Issued	Total Vouchers Searching	New Vouchers Leased	Applicants Pulled	New Vouchers Issued	New Vouchers Leased
City	36,311	0	117	192	5	0	123	45
County	35,800	0	29	62	70	0	46	229

## Wait List Report as of February 28, 2015

LIPH	1-Bdrm.	2-Bdrm.	3-Bdrm.	4-Bdrm.+	Total
City LIPH	11,059	7,510	3,718	825	23,112
County LIPH	10,351	9,086	4,099	610	24,146

Multifamily Developments	1-Bdrm.	2-Bdrm.	3-Bdrm.	4-Bdrm.	Total
Garland-S8N/C		8	100		108
Parkside-S8N/C		4	5	50	59

Tax Credit Properties	1-Bdrm.	2-Bdrm.	3-Bdrm.	4-Bdrm.	Total
<b>Granada:</b>					
tax credit units			11	8	19
subsidized units			74	18	92
<b>Pacific Gardens :</b>					
tax credit units	18	5	7		30
subsidized units	111	75			186
<b>Parc Grove:</b>					
tax credit units	126	69	55	23	273
subsidized units	1,690	1,060	189	52	2,991
<b>Yosemite Village</b>	804	224	21	0	1,049

## PEOPLE

### Overview

*Fresno Housing works to respect community needs and knowledge – by listening, learning and researching – and respond to issues compassionately, intelligently, intentionally – by developing exceptional programs based on shared expectations.*

### Resident Services

#### Health Care

The Resident Opportunities and Self-Sufficiency (ROSS) program coordinated an informational workshop for Fairview Heights and Sequoia Courts residents on the Program of All-Inclusive Care for the Elderly (PACE). PACE is a national program that provides an alternative to nursing home placement for the frail elderly who are able to remain in their homes. Members of the PACE program have access to the senior activities center, comprehensive medical and therapy services, round-trip transportation and caregiver support services all under one roof. Access to care is available 24 hours a day, 365 days a year. Residents were also given the opportunity to visit and take a tour of the 25,000 square foot facility, located on the corner of Van Ness and Kern Street. PACE representative coordinated transportation arrangements for the residents.



### **Family Resources**

Hands On Central California provided a Medi-Cal, CalFresh, and Covered California informational and enrollment event in Firebaugh. The event took place on the weekend, allowing working individuals the opportunity to attend. During the event, 17 residents were provided assistance with completing program applications, application renewals, and questions answered by enrollment specialists.



### **Renaissance at Alta Monte and Trinity Mental Health**

Fresno Housing Resident Services and National Alliance on Mental Illness (NAMI) Fresno collaborated to bring a six-month series of testimonials to Renaissance residents. NAMI Fresno has programs to assist consumers and their families with their journeys of healing and restoration. One of the programs, In Our Own Voices, provides presentations to the community about a person's life story dealing with mental illness. The presenter shares their experiences, diagnosis, prognosis, their interests and hobbies, and how mental illness is addressed daily.

During one of the presentations at Trinity, a resident was so moved by the presenter's story. The resident indicated he wanted to show the presenter how much he appreciated what he went through and the courage to share the difficulties of living with co-occurring illnesses.

NAMI Fresno will continue bringing a presenter to each site once a month. The goal is to help motivate the residents living with mental illness to continue with their medical and behavioral services, and for them to understand they do not struggle alone.

## **Parc Grove Commons/Northwest Youth Literacy/Health**

Abriendo Puertas parenting series continued through February. Enrollment has increased as the residents develop a comfortable relationship with the facilitator. FUSD Early Learning Department continues to provide child care services for the participating parents. The residents share a meal while they are engaging in activities designed to develop family advocacy skills such as: discussing health exams with doctors, monitoring visits to the dentist and eye doctor, visiting the child's school to become acquainted with administrators and teachers, and involving their children in meal preparation.

## **Homeless Initiatives Partnership**

25 Cities Campaign is a national initiative aimed at ending Veteran homelessness by the end of 2015; chronic homelessness by the end of 2016. Fresno was invited to the launch of the initiative which began with a series of discussions held in Washington, D.C. in March 2015 with leadership from HUD, Veterans Affairs, Continuums of Care and other stakeholders. Locally, initiative launch was held in May 2015 and the beginning of a coordinated system was born. The first 100 days of the campaign produced the infrastructure needed to effect change, including widespread use of a common assessment tool – Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT), a multi-agency outreach team and a community commitment to prioritize housing the most vulnerable in a coordinated, instead of fragmented manner. As the infrastructure and its norms became commonplace, in the second 100 days some goals and achievements were as follows:

- A goal to use the coordinated system to house 60 individuals in permanent supportive housing was exceeded; 105 individuals were housed in 100 days;
- Goal to administer the VI-SPDAT to 150 individuals was exceeded; 366 individuals were assessed using the VI-SPDAT in 100 days;
- Goal to assist 60 homeless individuals obtain documents needed for housing was exceeded; 69 obtained documents in 100 days;
- Goal to use the system to match 80 homeless individuals to appropriate housing was not met; only 69 persons were matched in 100 days.

## **PUBLIC**

### **Overview**

*Fresno Housing seeks to build support for housing as a key component of vibrant, sustainable communities through public information, engagement, and advocacy that promotes affordable housing and supports the advancement of Fresno's low-income residents.*

## **PARTNERSHIP**

### **Overview**

*Fresno Housing seeks to collaborate to strengthen its ability to address the challenges facing Fresno communities.*

Fresno Housing is exploring several partnerships in the course of pre-development activities.

Project	Organization	Role
Museum and multi-family housing development concept (1857 Fulton Street, Fresno)	African American Historical and Cultural Museum of the San Joaquin Valley	Development partner and service provider.  A meeting was held with the partners and Mogavero on November 25th to discuss planning needs.
Hmong Cultural Project – museum/cultural center, communal/event center, housing and relocation site for Fresno Center for New Americans	Fresno Housing Authority  Fresno Center for New Americans  General Vang Pao Foundation	Planning partner, possible development partner and service provider
Lowell Neighborhood Project	Lowell Community Development Corporation	Planning partner, possible development partner

## MANAGEMENT GOALS

*The goals of management include our efforts to stabilize, focus, and extend activities to meet the mandate of our mission through good decision making related to Sustainability (staffing, finances, effectiveness, evaluation, technology, facilities); Structure (governance); and Strategic Outreach (communications, image, visibility, public affairs, policy).*

### Sustainability

*Build and maintain an innovative, engaged, visible, and sustainable organization, committed to its mission of providing housing for low-income populations.*

### Fiscal Services

**2014 Audits:** Novogradac & Company, LLP, our auditors for most of the limited partnerships, is in the process of assisting us in supplying various forms of reports to investors. They will begin soon on the Better Opportunity Builders (BOB) audit, which consists primarily of a compilation of data from the limited partnership audits which fall under BOB's umbrella. The financial statement portion of the audits for the City and County authorities will begin in April.

**Asset Management Highlights:** Asset Management participated in setting the 2015 department goals and performed goal achievement planning for the year. Property tours to our city and county public housing communities was conducted in collaboration with a team from Construction and Housing Management Division in order to assess immediate capital improvement needs at each of the properties. All of the California Tax Credit Allocation Committee (“CTCAC”) annual welfare exemption filings for property tax abatement and the ownership certifications for 2014 have been completed.

**Budget and Internal Reporting:** All 2015 budgets have been entered into the Agency’s Accounting Software. We are currently focused on analyzing the variance between the Agency’s actual performance and the budgets set for 2014. The information gleaned from this analysis will enable our managers to improve their performance during this current year. Beginning this month and continuing as the year progresses, budgetary processes will be documented and saved in order to clarify the specific actions which must be carried out on a cyclical basis ensuring current and accurate financials are available to Management when needed.

**Goal Setting for 2015:** The Fiscal Services Department will submit its goals to executive management in the current month. The goals of the department focus on overarching Agency goals of 1) staff development, 2) financial reporting, 3) internal controls design and implementation and 4) analysis and evaluation. Each individual in a supervisory capacity has established approximately four operational goals and one professional goal. Progress in fulfilling these goals will be monitored throughout the year.

**Unaudited Financial Data Submission (FDS):** The FDS is the electronic vehicle in which a PHA submits its financial data to HUD. A PHA has 75 days after its year end to submit the unaudited FDS without penalties on its PHAS (Public Housing Assessment System) score.

## **Administrative Services**

### **Procurement**

The Procurement Department has worked closely with various Agency departments to acquire the following goods and services:

Recent Solicitations:

- An Enterprise Management System (EMS) RFP closed on 7/25/14. The Agency recently went on several site visits to better research each product. Additionally, a QSP was done to select an ‘EMS Evaluation Consultant’, to aid with the process. It is anticipated that an award decision will be made in the coming months. Additional information has been provided in Mid-Month Updates.
- A solicitation for Temporary Employment and Job Placement Services was posted on 8/25/14. The Agency was pleased to receive several quality proposals, and interviews were held to better understand their services. The Agency made tentative Notices of Awards to:
  - o Bennett/Frost Personnel Services for Direct Placement Staffing
  - o AppleOne Employment Services for Temporary Clerical and Supervisory Staffing
  - o Ultimate Staffing for Temporary Maintenance Staffing
- A Background Checks (Criminal, Eviction, Credit) RFP was posted on 12/3/14, and proposals were due 1/15/15. The Agency was pleased to receive several proposals and a Notice of Award is anticipated to take place within the next month.

- A Communications and Graphic Design Services RFP was issued on 1/8/15. The Agency was pleased to receive several proposals, all of which are currently being evaluated.
- The Agency was able to successfully piggy back off of the County of Fresno's Elevator Services contract with Schindler Elevator Corporation.

Upcoming solicitations include:

- Property Management
- Real Estate Agent
- Janitorial
- Development Consultant
- Security Guard Service

### **Human Resources**

The Human Resources Manager attended a Public Sector Employment Law Conference to gain further knowledge in CalPERS auditing requirements, labor negotiations, fact finding criteria and the top 10 personnel practices.

The department met with all employees who are eligible for the Early Retirement Program to discuss their retirement options, provide information regarding their specific retirement benefits and prepare for future succession planning of retirees.

Recruitment activity continues to be a focus of the department in the areas of HCV, Finance and Property Management positions. Recruitment was successful in filling the positions of Budget Analyst, Community Manager and two Office Assistants.

### **IT Services**

CMTi worked with various departments to provide auditors with access to Agency resources and data. Access was granted on an as needed and restricted basis in an effort to streamline the auditor process without overwhelming the auditors with more information than was required.

CMTi worked with Administrative Services to gain control over the registration of the hafresno.org domain. The domain was registered on a long term basis and so had not come up for renewal in the 8 years CMTi has been providing service to Fresno Housing. However, now that ownership and control of the domain has been established CMTi will continue to support legacy hafresno.org sites until they can be properly retired or transferred to the fresnohousing.org domain name.

As part of the initiative to move to a paperless environment, CMTi has been researching various services that will accommodate the needs of the Agency. CMTi will be looking to deploy Microsoft's Office 365 cloud platform to a test set of users in the coming months and collect feedback on its functionality. The hope is that it will prove to be a superior method of managing Agency data, email and collaboration. In addition, it is expected that rolling out this service to the entire Agency will reduce IT costs.

CMTi worked with AT&T to repair Internet connection issues between the Central Office and the District 2/ESU office. The office has multiple connections to the Central Office that are configured in a multi-link providing redundancy in the event of a failure.



## **Structure**

*Maintain a committed, active, community-based Boards of Commissioners.*

The efforts of the Boards and staff are ongoing and will be reported as outcomes are achieved.

## **Strategic Outreach**

*Heighten agency visibility, facilitate community dialogue about housing solutions; and build support for the agency and quality affordable housing.*

### **Communications**

In February, the Communications Department prepared the Legislative Priorities and Asks for the 2015 NAHRO Conference in Washington, DC. In 2015, Fresno Housing will focus on achieving the legislative and regulatory priorities that align with the Agency's mission through strategic communication to our elected officials. Fresno Housing will also continue to monitor the federal policy environment and respond to emerging issues as needed.

The Communications Department also continues the strategic planning, messaging and events for the 75<sup>th</sup> Anniversary Celebration.

# ***Fresno Housing Celebrates 75 Years***

*Board of Commissioners Meeting  
March 24, 2015*



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

## ***Vision***

- Fresno– an engaged county– where all residents have access to quality housing that contributes to vibrant communities, and where all residents are empowered to achieve their educational and economic goals.

## ***Mission***

- Create and sustain vibrant communities throughout Fresno County.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

**FRESNO** **VIBRANT**  
COMMUNITIES  
**QUALITY** **HOUSING**  
HOUSING  
**AUTHORITY** **ENGAGED**  
RESIDENTS

# *75<sup>th</sup> Anniversary Vision*

A year-long celebration of a 75- year legacy...

that lays the groundwork for a bold and innovative future...

A celebration that uses 2015

to honor the past, recognize the present, and

strategically consider the coming years–

through the creation of purposeful tools, events and

activities that educate the community,

broaden support, acknowledge staff–

and inspire action for the future.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

CELEBRATING

75

YEARS

FRESNO HOUSING

# ***75<sup>th</sup> Anniversary Goals and Strategies***

- 1. Increase Visibility**
- 2. Break Stereotypes**
- 3. Acknowledge Accomplishments**
- 4. Enhance Communications**



# *75<sup>th</sup> Anniversary Goals and Strategies*

1. **Increase Visibility** and enhance the image of Fresno Housing by telling the story and promoting its successes
2. **Break Stereotypes** about affordable and public housing by addressing misperceptions and expanding understanding



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



# *75<sup>th</sup> Anniversary Goals and Strategies*

3. **Acknowledge Accomplishments** of Fresno Housing by promoting achievements of the past 75 years, with a focus on recent successes and setting the foundation for the future
4. **Enhance Communications** from Housing by creating special events and building upon existing outreach activities



## *75<sup>th</sup> Anniversary Elevator Pitch*

Fresno Housing is about a lot more than housing,  
but we believe housing is core...

We create vibrant communities and quality  
housing and we work to engage our residents to  
excel in school and work.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

# *Messages and Communication Strategy*

- Place
- People
- Partnerships
- Public



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING





# *75<sup>th</sup> Anniversary Messages*



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



For 75 years, Fresno Housing Authority has changed the lives of tens of thousands of families throughout Fresno County. The story of Fresno Housing is the story of those families — their hopes, their dreams, their accomplishments. *They are stories where housing is sometimes the hero and sometimes the supporting actor.*



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



Fresno Housing has been changing the definition of development — strengthening and rejuvenating neighborhoods by leveraging funds and improving infrastructure in order to maximize opportunities for individuals, families, and whole communities.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

As Fresno Housing approaches its 75th year,  
it celebrates its staff, the families it houses,  
and its many public, private, and nonprofit  
partners who help the agency ensure that  
educational, social, and health programs are  
integrated into housing.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

With 75 years of experience, the Fresno Housing Authority recognizes and embraces the power of partnership — collaborating with public and nonprofit organizations to support residents to reach their full potential.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING





Fresno Housing Authority invests  
in the sustainability of all communities  
In Fresno County.



CELEBRATING



YEARS  
FRESNO HOUSING

Fresno Housing Authority's assets belong to the community, underscoring the agency's "bottom line": a dedication to the health and prosperity of all of Fresno.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

For 75 years, Fresno Housing has recognized its responsibility to be professional, effective, and unparalleled in its commitment to leverage opportunities to support the communities of Fresno County.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



As Fresno Housing Authority reflects on a strong, 75-year foundation — working innovatively, collaboratively, and strategically — to be the best, so that Fresno County can be the best.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

Fresno Housing is the community conscience  
about housing needs and the support  
systems necessary for low income families  
to thrive.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

For 75 years, Fresno Housing Authority has worked throughout Fresno County to create quality affordable housing opportunities and an array of programs to build vibrant communities.



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



The Fresno Housing Authority has been  
changing the definition of “housing” —  
integrating education, health, nutrition, and  
employability into the core concept of  
housing programs



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



# *Fresno Housing Authority Performance Management Overview*

*March 24, 2015*



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



# ***Agenda***

Program Overview

Goal Setting Fundamentals

Aligning Goals Workshop



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

## ***Performance Overview***

- Performance Management is the process of maintaining or improving employee job performance through the use of performance evaluation, coaching and continuous feedback
- Performance Management drives employee behavior to align with organizational goals & objectives



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



## ***Performance Overview (cont'd)***

- Alignment occurs because:
  - Job responsibilities and expectations are clear, resulting in increased individual and group productivity
  - Better information is available to use for compensation and promotion decisions
- Currently, the plan applies to all staff that are at the analyst level and above



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



# *Performance Management Cycle*



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING

# ***Importance of Aligning Goals***



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



# *Importance of Aligning Goals*

## VISION

- Fresno – an engaged county – where all residents have access to quality housing that contributes to vibrant communities, and where all residents are empowered to achieve their educational and economic goals

## MISSION

- Create and sustain vibrant communities throughout Fresno County

## GOALS

- Place
- People
- Public
- Partnership





## ***Goal Setting Overview***

- Gives employee direction beyond job description and daily tasks
- Agencies that align goals across the organization enjoy higher levels of success, because everyone is pulling in the same direction
- Goals must be clear, objective, and understandable, otherwise employees become disengaged.



CELEBRATING  
**45**  
YEARS  
FRESNO HOUSING

# ***S.M.A.R.T***

- In order to measure and reward performance accurately, it is critical that goals are “SMART”
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**elevant
  - **T**imed





## *Testing Goals*

- Keep the Vision, Mission and Goals in mind
  - Always look to the bigger picture
  - “How does this help the Agency?”
- Run through the S.M.A.R.T. criteria
  - Specific, Measurable, Achievable, Relevant and Timed
- Manager and employee should work together
  - Ask the employee if their goals are reasonable and what he/she would do to change them?





*Questions?*

CELEBRATING

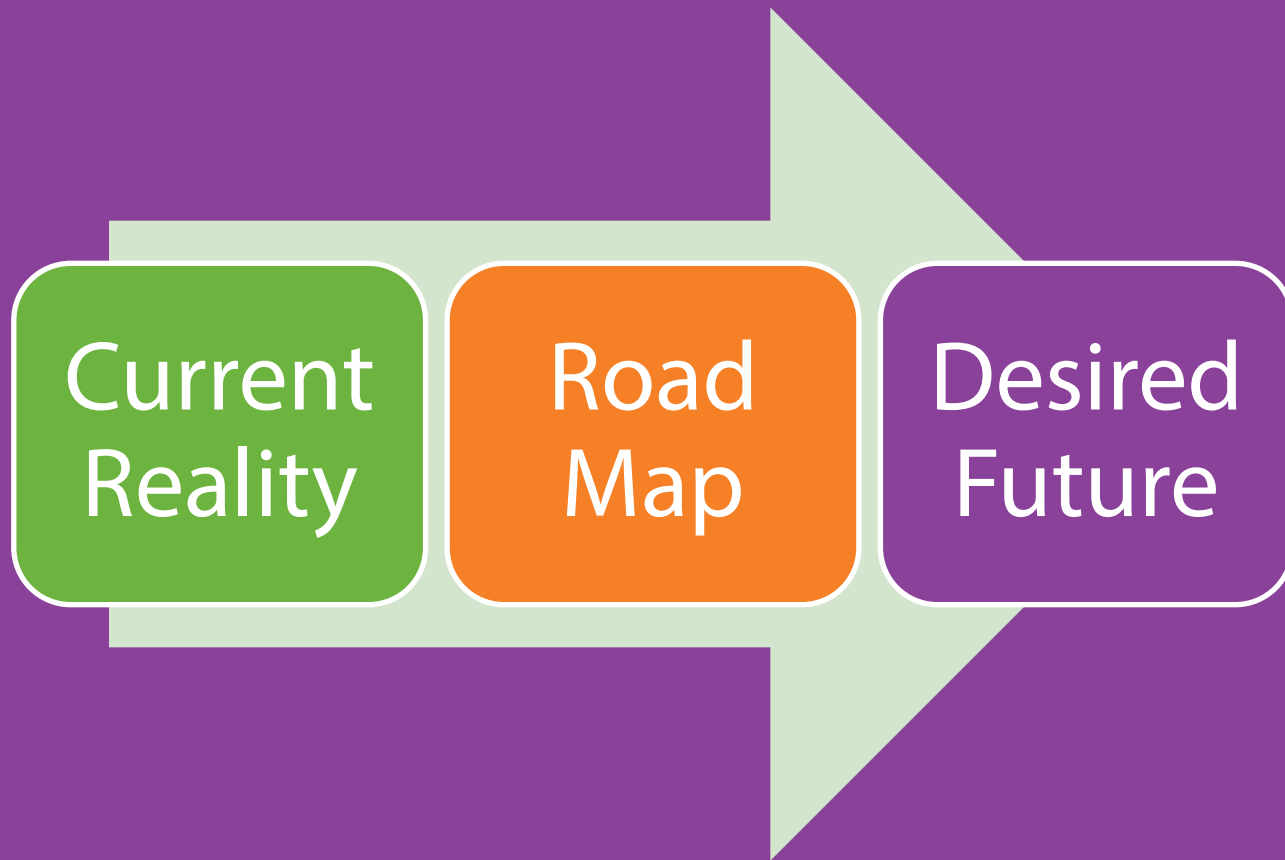
75

YEARS  
FRESNO HOUSING



## Resident Services Strategy

*Board of Commissioners Meeting  
March 23, 2015*





# Resident Services: Current Reality

- Lots of great programs, dedicated Site Coordinators
- Partner specific, grant specific
- Inconsistent and restricted funding sources
- Limited availability of data, centered on participation
- Primarily focused in the City of Fresno and on public housing sites
- Only three dedicated staff with funding restrictions

# Desired Future

- A Resident Services Department that coordinates and implements programs and support services that we know, through the examination of data, have a meaningful impact on our residents' journeys to self-sufficiency



# Strategic Planning Goals and Roadmap

- Develop focus areas based on research
- Create goals and metrics
- Design a program delivery system and sustainable infrastructure
- Identify key partners and establish expectations
- Determine intentional ways to engage the HCV residents



# Focus Areas

- Education
- Health and Wellness
- Wage Progression



# Here are the facts - Education

- Research has shown that a student not reading at his or her grade level by the end of the third grade is four to six times less likely to graduate from high school
  - 56% of ALL the children in Fresno County do not read at Grade Level
  - 65% of the children who are economically disadvantaged do not read at grade level
  - 78% of English Learners in Fresno County do not read at Grade Level

# Here are the facts - Education

- More than 27% of Fresno residents do not have a high school diploma as compared to 15.5% nationally
- Less than half (42%) of the mothers in Fresno County have a high school diploma and only 15% have a bachelor's degree or higher
- According to a study in Fresno County, the most important factor influencing a child's potential interaction with CPS is the education level of the mother

# Here are the facts – Health and Wellness

- USDA reports that 28% of adults live in food insecure households (lack of access due to funds or resources)
- CA obesity rate for youth is 38%; in Fresno Co. it is 43%
- In Fresno County, 176,000 children and adults have asthma
- Low average life spans for people of color
  - A person born in California has a 90% chance of reaching the age of 60.
  - A white person born in Fresno County has an 80% chance of reaching the age of 60.
  - A person of color born in Fresno County has a 60% chance of reaching the age of 60.

# Here are the facts – Wage Progression

- Fresno County has the highest poverty rate in California with over 27% of its residents living in poverty
- Nearly 40% of families in Fresno County earn less than \$35,000
- More than 27% of Fresno residents do not have a high school diploma as compared to 15.5% nationally
- A person with a bachelor's degree has 40% more earning potential than a person with only a HS diploma
- According to a study done by the WIB, one of the top barriers employers face is access to a skilled workforce in Fresno



## Strategic Planning Goals and Roadmap

- Develop focus areas based on research
- Create goals and metrics
- Design a program delivery system and sustainable infrastructure
- Identify key partners and establish expectations
- Determine intentional ways to engage the HCV residents

## Target Goals

The Ed Corps and Fresno Housing Authority want to help our students achieve self-sufficiency through education

### SELF-SUFFICIENCY

#### TARGET GOAL:

#### INCREASE HIGH SCHOOL GRADUATION RATES

100% high school graduation rate among Fresno Housing Authority students

Partner with existing parent programs to make sure parents and students understand graduation requirements

Provide tutoring at Fresno Housing sites to encourage high academic achievement

Present scholarships to our graduating students that will continue their education

#### TARGET GOAL:

#### SMOOTH THE TRANSITION TO MIDDLE SCHOOL

Encourage parents and students to attend preview nights

Create mentor relationships for students attending the same school

Encourage parents to track academic and behavior information on school district student information systems

#### TARGET GOAL:

#### FOSTER GRADE LEVEL READING

Implement reading programs at Fresno Housing Authority Sites

Create community libraries in Fresno Housing sites

Provide students with books for their home library

### Building Blocks

Key areas to academic success:

#### PARENT ENGAGEMENT

Utilize existing parent programs offered by school districts to help parents become engaged in their children's education both in the classroom and at home.

#### ATTENDANCE

Utilize student data collected by each school district to track and incentivize attendance.

#### SCHOOL READINESS

Collaborate with school district staff to provide our children with the resources they need to successfully begin the school year.

FAMILIES

FUNDERS

PARTNERS

### Key Builders

### Establishing a Foundation

DATA | ANALYSIS | MOU

The Ed Corps is collaborating with Fresno Housing Authority and local school districts to create data sharing waivers to protect our students and parents while better understanding students' needs. Data will be used to offer educational programs to increase our students' academic achievement.

### Framework for Success

Collaboration between Fresno Housing Education Corps, Fresno Housing Authority, and school districts within Fresno County to create a framework to fill the gaps and extend education beyond the classroom.

# Resident Services: Goals and Metrics

- Education
  - MOU and Parent Waiver
  - Parent Engagement
  - Preschool Enrollment

# Resident Services

- Health and Wellness
  - Insurance Enrollment
  - Nutrition Education
  - Vision Screening



# Resident Services

- Wage Progression
  - GED
  - Financial Literacy
  - Self-sufficiency support



## Strategic Planning Goals and Roadmap

- Develop focus areas based on research
- Create goals and metrics
- **Design a program delivery system and sustainable infrastructure**
- **Identify key partners and establish expectations**
- Determine intentional ways to engage the HCV residents



# Delivery and Structure

- Manager will supervise Coordinators that have expertise in Focus Areas
- Partners will deliver programming, not FH staff
- Coordinators will work with partners to establish expectations and review data
- Coordinate with Ed Corps to create funding streams for programmatic areas
- Apply for grants that align with our focus areas
- Utilize existing funding streams in broadest ways possible
- Evaluate sustainability annually

# Questions and Comments



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***Fresno Housing Authority***

***Housing Choice Voucher Program –  
Housing Quality Standards (HQS)***

***Boards of Commissioners Meeting  
March 24, 2015***

“Housing Quality Standards (HQS) are set in place to ensure that the assisted housing is decent, safe and sanitary.

HQS standards apply to the building and premises, as well as the unit.”

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## Agenda Topics

- 2014 HQS Pass Rates
- HCV Housing Stock
- In-depth Analysis
  - Housing stock by zip code
  - Geographic areas of concern

## 2014 HQS Pass Rates

- Performed over 30,000 initial and annual inspections
- 62.2% pass rate for these inspections
- 2013 pass rate was nearly identical to 2014



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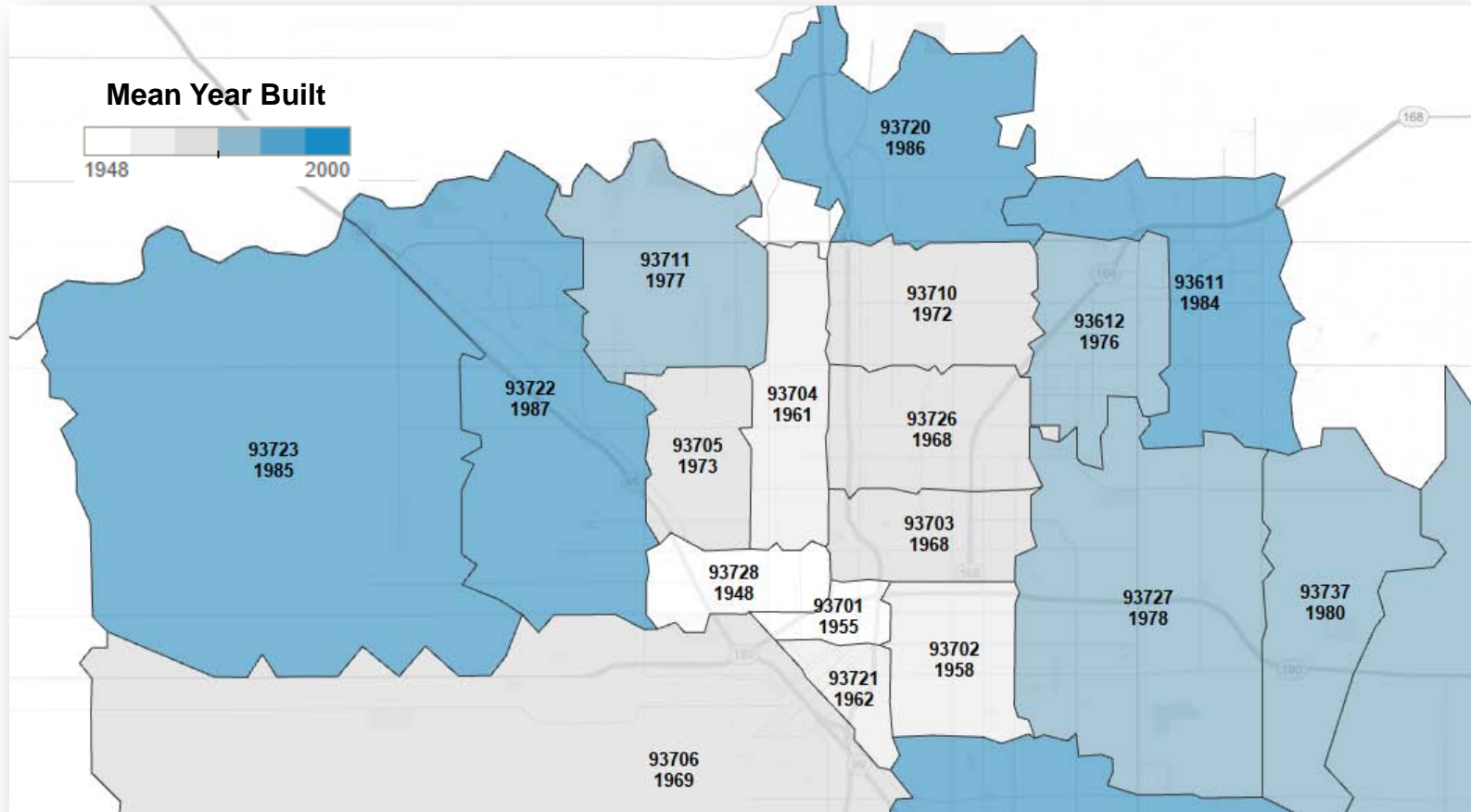
# HCV Housing Stock

- Inspections conducted in over 12,400 units
- Average age of all units was 41 years (1973)
- 69% of the units were multi-family dwellings
  - Average age of the units was 37 years (1977)
- 31% of the units were single-family dwellings
  - Average age of the units was 51 years (1963)

# Housing Stock by Zip Code

City	Zip	Avg Age	Avg Year Built
Fresno	93722	27	1987
Fresno	93725	28	1986
Sanger	93657	34	1980
Selma	93662	35	1979
Fresno	93727	36	1978
Clovis	93612	38	1976
Fresno	93705	41	1973
Fresno	93710	42	1972
Fresno	93706	45	1969
Fresno	93726	46	1968
Fresno	93703	46	1968
Fresno	93721	52	1962
Fresno	93704	53	1961
Fresno	93702	56	1958
Fresno	93701	59	1955
Fresno	93728	66	1948
<i>Average</i>		<b>42</b>	<b>1972</b>

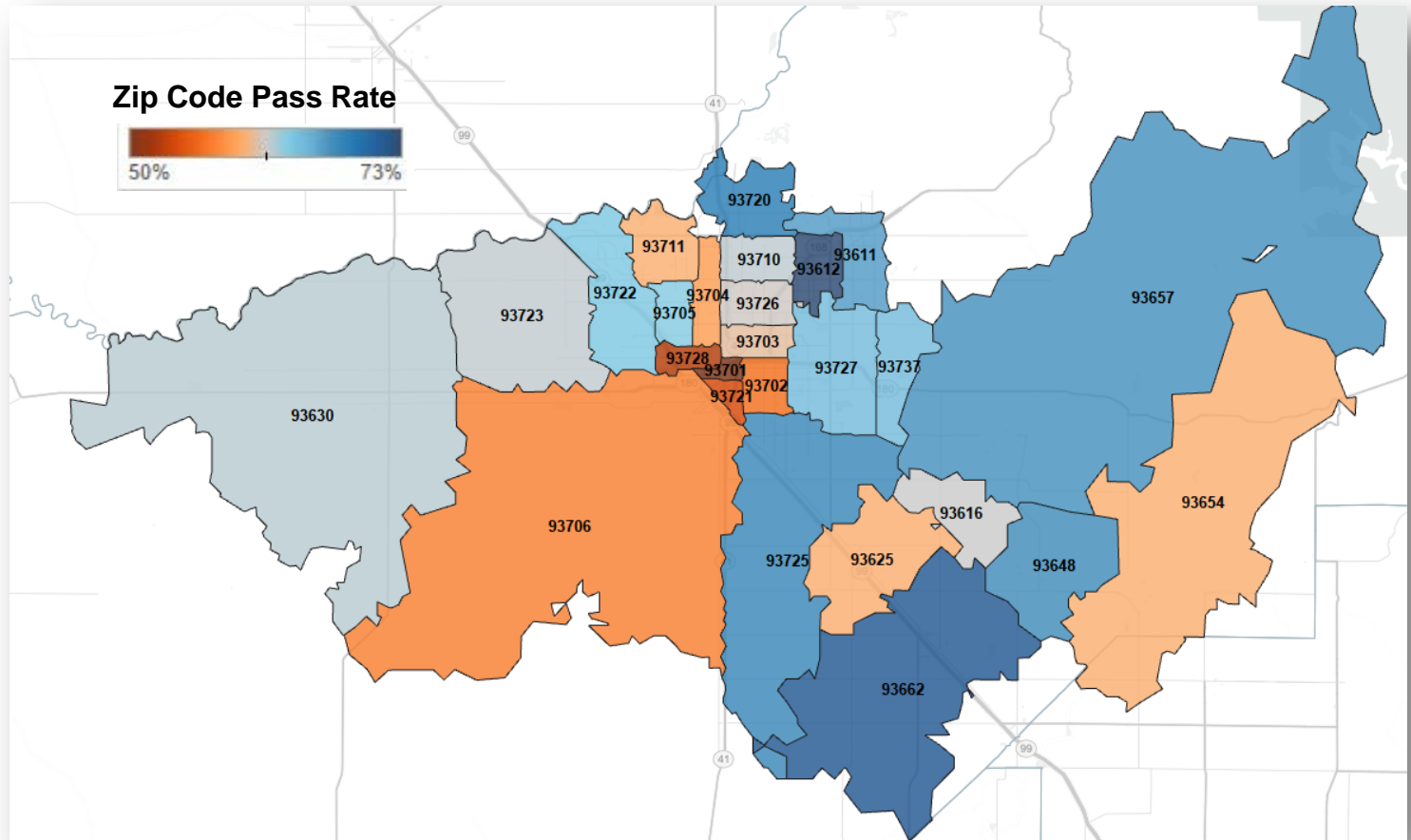
# Housing Stock by Zip Code



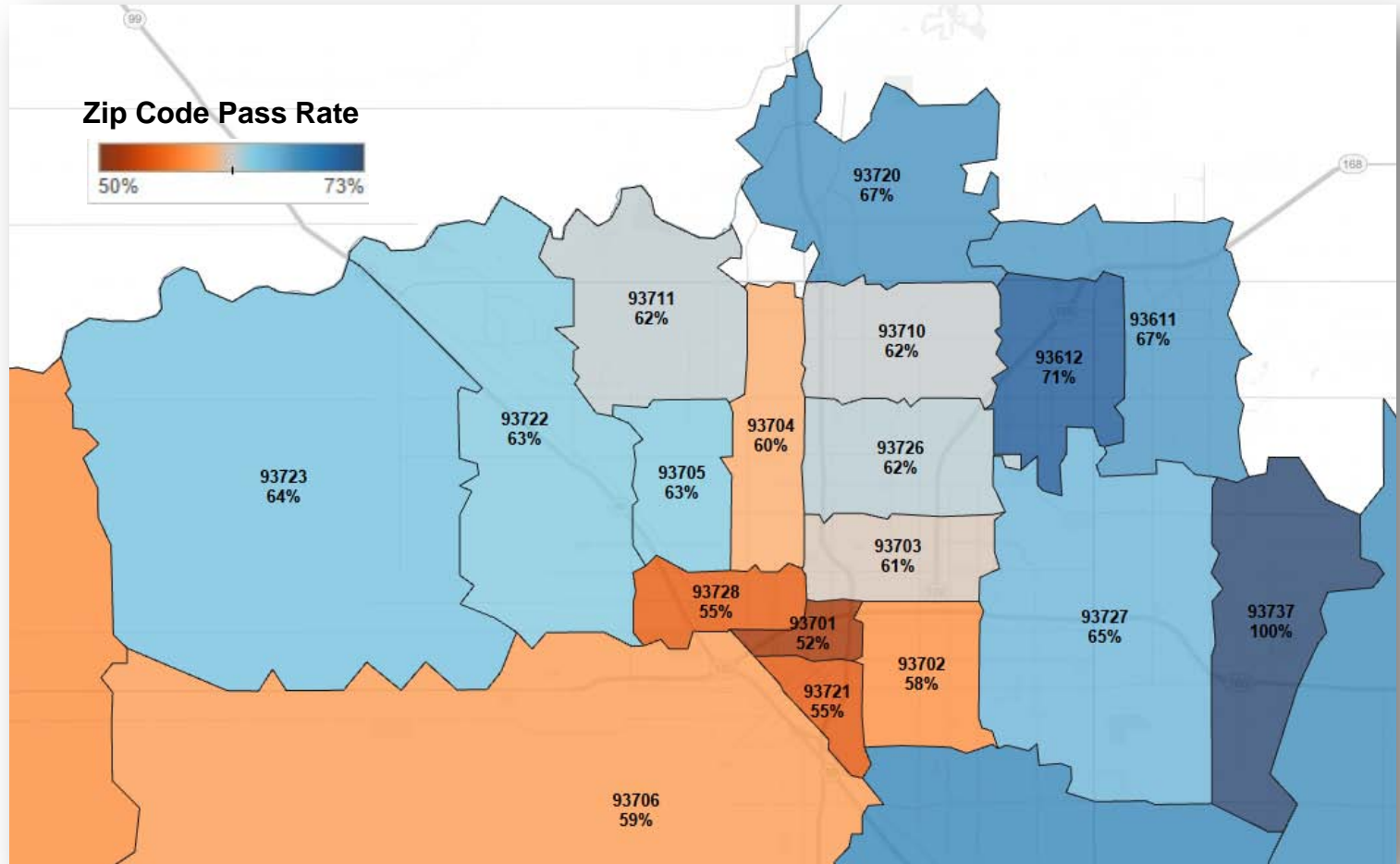
# Housing Stock by Zip Code

City	Zip	Avg Age	Avg Year Built	Pass Rate
Selma	93662	35	1979	72.5%
Clovis	93612	38	1976	71.2%
Fresno	93725	28	1986	67.5%
Sanger	93657	34	1980	67.0%
Fresno	93727	36	1978	64.9%
Fresno	93722	27	1987	63.2%
Fresno	93704	53	1961	59.7%
Fresno	93706	45	1969	58.7%
Fresno	93702	56	1958	58.0%
Fresno	93728	66	1948	55.1%
Fresno	93721	52	1962	54.7%
Fresno	93701	59	1955	52.0%

# Housing Stock by Zip Code – County



# Housing Stock by Zip Code - City



# Housing Stock by Zip Code

- The six zip codes with the highest pass rates had an average pass rate of 67.7%
- Units in these zip codes were 67% multi-family and 33% single-family
- The average M-F unit was built in 1984 (30 yrs) while the average S-F unit was built in 1975 (39 yrs)

# Housing Stock by Zip Code

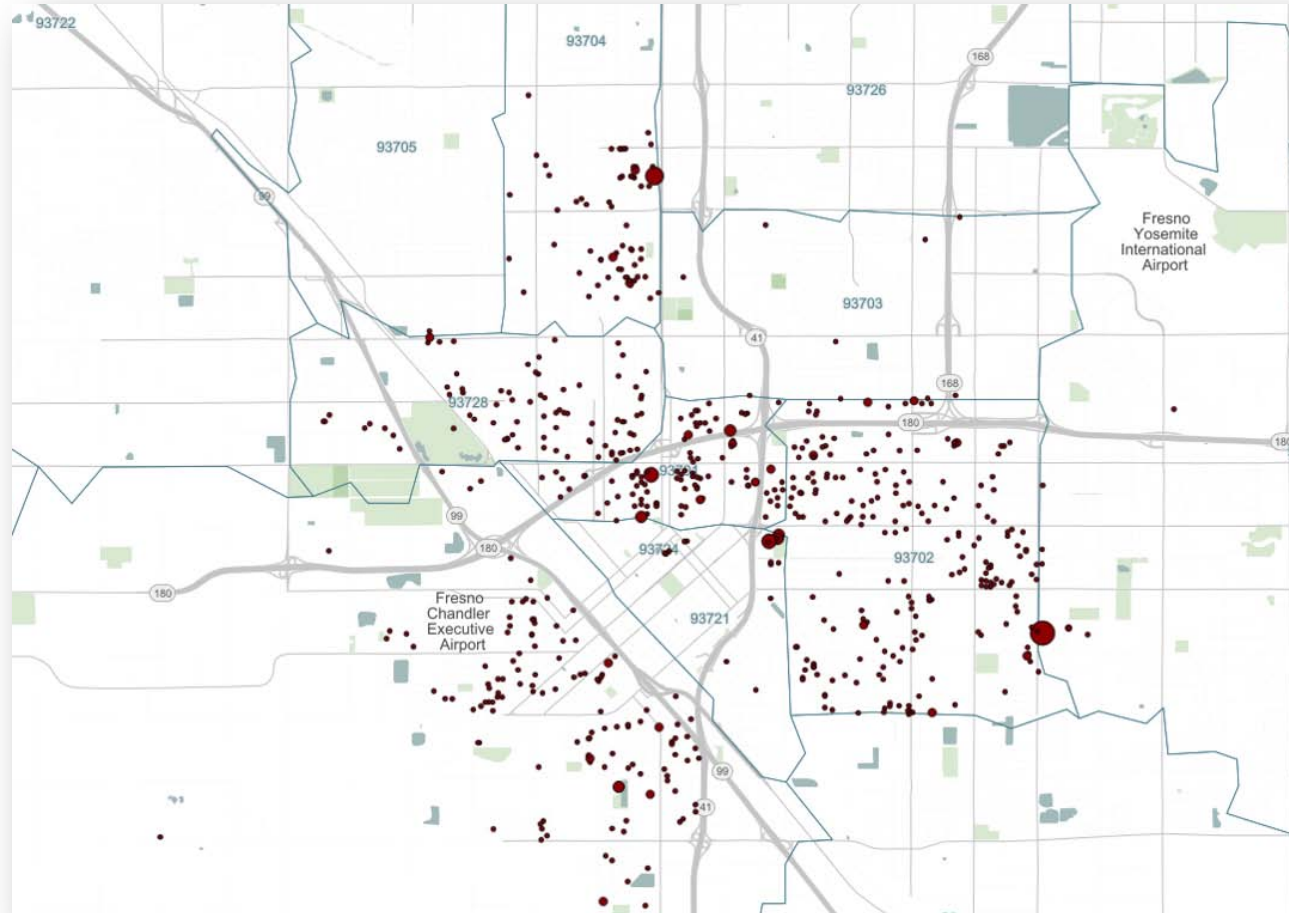
- The six zip codes with the lowest pass rates had an average pass rate of 56.4%
  - *~11.3% difference in the six highest zip codes*
- Units in these zip codes were 59% multi-family and 41% single-family
  - *~8% fewer M-F units*
- The average M-F unit was built in 1968 (46 years) while the average S-F unit was built in 1947 (67 years)
  - *M-F units are about 16 years older and S-F units are 28 years older*
- Age of a unit was a significant indicator of housing quality
  - *Every ~1.6 years in unit age reduces the pass rate by 1%*



# Housing Stock by Zip Code

City	Zip	Pass Rate	M-F%	Avg Year	Avg Age	S-F%	Avg Year	Avg Age
Selma	93662	72.5%	72.5%	1981	33	27.5%	1970	44
Clovis	93612	71.2%	87.1%	1977	37	12.9%	1969	45
Fresno	93725	67.5%	52.6%	1997	17	47.4%	1973	41
Sanger	93657	67%	47.4%	1981	33	52.6%	1978	36
Fresno	93727	64.9%	79.9%	1981	33	20.1%	1973	41
Fresno	93722	63.2%	64.5%	1987	27	35.5%	1987	27
<i>Average</i>		67.7%	67.3%	1984	30	32.7%	1975	39
Fresno	93704	59.7%	62.2%	1967	47	37.8%	1952	62
Fresno	93706	58.7%	41.8%	1986	28	58.2%	1957	57
Fresno	93702	58%	43.3%	1974	40	56.7%	1946	68
Fresno	93728	55.1%	54.2%	1958	56	45.8%	1937	77
Fresno	93721	54.7%	87.0%	1963	51	13.0%	1950	64
Fresno	93701	52%	64.1%	1962	52	35.9%	1942	72
<i>Average</i>		56.4%	58.8%	1968	46	41.2%	1947	67

# Geographic Areas of Concern



# Geographic Areas of Concern

- These areas will serve as our starting point in deeper analyses and owner-agency relations
- Who are these owners? Do they own units in higher pass rate areas?
- Given that age is biggest factor, what can these owners do to modernize and update their units?

Questions?

Comments?



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## ***Financial Operating Results***

***as of Dec. 31, 2014***

*Fresno Housing Authority  
Boards of Commissioners Meeting  
March 24<sup>th</sup> 2015*



# Overview

- 2014 Operating Budget
- Financial Results through Dec. 31, 2014
- Financial Highlights
- HAP Financial Results

# 2014 Budget

## Fresno Housing Authority 2014 Operating Budget

	Core	Instrum.	P&CD	Assisted Housing	Housing Mgmt.	Affordable Housing	Total
Income	8.15	1.09	4.28	10.14	11.16	1.67	36.49
Expenses	7.90	0.61	2.80	11.24	10.53	1.23	34.31
<b>+/-</b>	<b>0.25</b>	<b>0.48</b>	<b>1.47</b>	<b>(1.10)</b>	<b>0.62</b>	<b>0.45</b>	<b>2.18</b>
<i>Unrestricted</i>	<i>0.25</i>	<i>-</i>	<i>1.47</i>	<i>(1.10)</i>	<i>-</i>	<i>0.45</i>	<i>1.08</i>

\*all figures in millions of dollars and rounded to the nearest ten thousandth

# 2014 Year End Results

## Fresno Housing Authority 2014 Financial Results

	Core	Instrum.	P&CD	Assisted Housing	Housing Mgmt.	Affordable Housing	Total	2014 Budget	Fav/ (Unfav) Variance
Income	8.54	1.95	2.77	9.88	13.32	1.71	38.18	36.49	1.69
Expenses	7.76	0.68	1.78	10.88	11.41	1.13	33.63	34.31	0.68
+/-	0.79	1.27	1.00	(1.00)	1.91	0.58	4.55	2.18	2.37
<i>Unrestricted</i>	0.79	-	1.00	(1.00)	-	0.58	1.37	1.08	0.29

- Overall, the Agency has realized \$2.37 million more in net income than originally budgeted for 2014.
- Compared to the Budget, **restricted** net income is up \$2.08 million, and **unrestricted** net income is up \$290k.

•all figures in millions of dollars and rounded to the nearest ten thousandth



# Revenue Highlights

	Unrestricted	Restricted	Total
Budgeted Income	14.11	22.38	36.49
Actual Income	13.03	25.14	38.18
<i>Fav/(Unfav) Variance</i>	<i>(1.07)</i>	<i>2.76</i>	<i>1.69</i>
<i>Unrestricted Variance</i>	<i>(1.07)</i>	<i>-</i>	<i>(1.07)</i>

- **Unrestricted Programs**
  - *Includes Core, P&CD, Aff. Hsg. & any negative net operating income in AHD.*
  - P&CD: Received \$1 million less in developer fees than expected, of which \$400k is a permanent loss. The other \$600k will be received in 2015.
- **Restricted Programs**
  - *Includes Instrum., AHD, HSM, & any positive net operating income in AHD.*
  - HSM: Received 30.4% more revenue in the form of HUD grants, the majority of which is revenue for the RAD programs.

•all figures in millions of dollars and rounded to the nearest ten thousandth

# Expense Highlights

	Unrestricted	Restricted	Total
Budgeted Expenses	11.93	22.38	34.31
Actual Expenses	10.66	22.97	33.63
<i>Fav/(Unfav) Variance</i>	<i>1.27</i>	<i>(0.59)</i>	<i>0.68</i>
<i>Unrestricted Variance</i>	<i>1.27</i>	<i>-</i>	<i>1.27</i>

- **Unrestricted Programs**
  - Includes Core, P&CD, Aff. Hsg. & any negative net operating income in AHD.
  - P&CD: Due to the close out of two programs we were able to save on non-capitalizable projects and debt related costs. Also, expenses savings in P&CD on Professional & Consulting Fees.
- **Restricted Programs**
  - Includes Instrumentalities, HSM, & any positive net operating income in AHD.
  - HSM: \$1 million of subsidy was passed to the RAD's, only \$400k was budgeted.

•all figures in millions of dollars and rounded to the nearest ten thousandth

# Unrestricted Operating Reserves

Unrestricted Operating Reserve Balance, as of 12/31/13	1.57
Final 2014 Net Unrestricted Income	1.37
<b>Projected Unrestricted Operating Reserve Balance, as of 12/31/14</b>	<b>2.94</b>
Budgeted 2015 Net Unrestricted Income	(0.66)
<b>Budgeted Unrestricted Operating Reserve Balance, as of 12/31/15</b>	<b>2.28</b>

- Unrestricted operating reserve balance is currently \$2.94 million.
- Staff is proposing to utilize \$663 thousand of unrestricted reserves in 2015 in order to continue key investments.
- This would bring the reserve balance to \$2.28 million at the end of 2015.

# 2014 HAP Financial Results

HAP	2014 Budget	2014 Financial Results	2014 Favorable (Unfav.) Variance
Income	80.59	76.96	(3.63)
Expenses	80.42	77.06	(3.36)
+/-	0.17	(0.10)	(0.27)

- **Overview**
  - As we lowered expenses within HAP in 2014, HUD decreased funding according to their Cash Management policy. Remaining budget was put into reserves.
  - Ideally HUD would fund us the exact amount needed to cover our expenses, however in cases such as this the deficit is covered by the Agency's restricted HAP reserves.

•all figures in millions of dollars and rounded to the nearest ten thousandth

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# Questions or Comments?

# Legend

Division	Program Type	Net Income Restrictions	Departments
Core	Administrative Services	Unrestricted	Human Resources, Fiscal Services, Executive Office, Operations, COCC
Instrumentalities (Instrum.)	Closely-Related Entities	Restricted	Housing Relinquished Fund Corp. (HRFC), Housing Self-Insurance Corp. (HSIC), Silvercrest, Villa del Mar
Assisted Housing (AHD)	Housing Programs	Positive Net Income is Restricted. Negative Net Income is Unrestricted.	Housing Choice Voucher, Homeless Services, Resident Services Programs
Housing Mgmt. (HSM)	Housing Services	Restricted	Low-Rent Public Farm Labor, Migrant, CHFA Housing
Affordable Housing	Non-Subsidized Housing	Unrestricted	Firebaugh Family, Dayton Square, Woodside Apts., El Cortez

# ***Fresno Housing 75<sup>th</sup> Celebration Overview***

March 24, 2015



CELEBRATING  
**75**  
YEARS  
FRESNO HOUSING



# ***Overview of Events January- March 2015***

- Launch of 75<sup>th</sup> Anniversary with Staff and Board
- Launch of 75<sup>th</sup> logo and brand
- Launch of Monthly Staff Newsletter
- Begin Community Outreach Presentations
  - Fresno County Board of Supervisors
  - City of Fresno





## ***Overview of Events***

- Launch External Newsletter to Community Partners
- Launch Resident Newsletter
- Launch 75 Facts/Tweets
- Distribute Capacity Report with letter from Preston highlighting our 75<sup>th</sup> Anniversary
- Fresno Bee Story featuring stories highlighting Anniversary and FH successes



## ***Overview of Events***

- Community Outreach Presentations
  - City of Fowler (April 7)
  - Reedley Chamber of Commerce (April 14)
  - Downtown Fresno Partnership Board (April 15)
  - Fresno County EOC Board (April 22)
  - Fresno Chamber of Commerce Board (May 20)
- State of Housing
- RAD Grand Openings celebrating residents
- Staff Community Service Day(s) at FH sites
- Staff Celebration Event

