

# FY00 BUDGET OBJECTIVES AND ACCOMPLISHMENTS

A supplement to the San Diego Housing Commission  
Fiscal Year 2000 Annual Report

- I Housing Services
- II Housing Policy, Production & Finance
- III Operations

*Note: The following rating key was utilized to determine success in meeting goals:*

<b><i>Rating Key:</i></b>	
<b><i>Less than 95% of goal</i></b>	<b><i>= Did not meet goal</i></b>
<b><i>Greater than 95% but less than 105%</i></b>	<b><i>= Goal met</i></b>
<b><i>Greater than 105% of goal</i></b>	<b><i>= Goal exceeded</i></b>

# Table of Contents

<u>Pages</u>		<u>Pages</u>	
<b>1-27</b>	<b><u>Attachment 1: FY 2000 Objectives and Accomplishments</u></b>		
<b>1-10</b>	<b>Housing Services</b>	15	Portfolio Servicing and Occupancy Monitoring
1-3	Rental Assistance	16	Special Purpose Housing
1	Eligibility	17	Resource Development and Compliance
2	Inspections	<b>18-27</b>	<b>Operations</b>
3	Occupancy	18-19	Board & Executive Functions
4-7	Property Management	20-26	Support Services
4	Eligibility	20	Human Resources
5	Occupancy	21	Fiscal Services
6	Routine Maintenance	22	Information Systems Support
7	Major Renovations	23	Financial Management
8-10	Resident Services	24-25	Equal Opportunity & Contracting
8	Self-Sufficiency	26	Facilities Management
9	Youth, Family and Senior Programs	27	Community Relations
10	Resource Development and Compliance		
<b>11-17</b>	<b>Housing Policy, Production &amp; Finance</b>	<b>1-25</b>	<b><u>Attachment 2: FY 2000 Housing Projects Status Report</u></b>
11	Rental Housing Production		
12	Homeownership		
13-14	Rehabilitation		
13	Rental Housing		
14	Owner Occupied		

**Rental Assistance**

**The Rental Assistance Program (RAP)** provides rental subsidies to 9,300 qualified low-income households (26,817 individuals) living in privately owned rental units. The primary program is federally funded Section 8 but also includes locally defined assistance for the terminally ill and others with special needs. The sub-activities include waiting list and eligibility, unit inspections and rent determination, and ongoing program operations.

Eligibility

**The Rental Assistance Eligibility Activity includes:** Maintenance of the waiting list, determining applicant eligibility, and issuing vouchers at briefings.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Respond to waiting list correspondence of approximately 540 letters per month within 7 working days.</li> <li>2. Respond to application requests of approximately 300 per month within 7 working days.</li> <li>3. Interview 170 applicants each month for the Certificate and Voucher Program.</li> <li>4. Brief 124 applicants each month for the Certificate and Voucher program.</li> <li>5. Implement the Quality Housing and Work Responsibility Act of 1998, which includes redesigning waiting list and eligibility process to ensure that 75% of applicants assisted have incomes below 30% of median income.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. Responded to an average of 892 letters (for both Section 8 and public housing applicants) per month within 7 working days.</li> <li>2. Goal exceeded. Responded to an average of 647 application requests (for both Section 8 and public housing applicants) per month within 7 working days.</li> <li>3. Goal met, as revised. Changes in the Voucher payment standard, which expanded housing opportunities, and the new Housing Choice Voucher, interviewing 119 applicants per month, was sufficient to maintain a 98% lease-up rate.</li> <li>4. Goal met, as revised. Local changes in policy and federal regulations were made, which made the program more accessible (see above): briefed 84 applicants per month, which was sufficient to close the year with a 98% lease-up rate.</li> <li>5. Goal met. The waiting list processes and preferences were streamlined. Income targeting goals were met. Approved by the Housing Commission in November, 1999, and approved by the Housing Authority in December, 1999.</li> </ol>

**Rental Assistance**

---

Inspections

**The Inspections** function performs required move-in, move-out, annual, special and quality control inspections for the rental assistance program and conducts annual rent comparability studies and determines rent reasonableness for each lease.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Conduct regular move-in inspections within three to five working days.</li> <li>2. Conduct move-out inspections for possible claims within two working days from request.</li> <li>3. Conduct quarterly owner workshops and prepare newsletters quarterly.</li> <li>4. Send out information to owners with their housing assistance payment, updating them on regulations, processes and procedures, or any other relevant information, on a quarterly basis.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal met.</li> <li>2. Goal met.</li> <li>3. Goal met. Conducted four quarterly owner workshops in the months of September, 1999, January, May and June, 2000. In addition, developed owner newsletter, "VIEWpoint," distributed in October, 1999, January, April and June, 2000.</li> <li>4. Goal met. Sent information to owners through the owner newsletter, "VIEWpoint," flyers, and a new owner brochure.</li> </ol>

**Rental Assistance**

Occupancy

The Rental Assistance Occupancy unit conducts all ongoing functions relating to more than 9,400 assisted households and participating landlords, including: annual re-examinations to determine continued eligibility for the program and interim adjustments for program participants where there is a change in income and family composition.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Maintain lease-up rate of 95% based on Section 8 Management Assessment Program (SEMAP) compliance.</li> <li>2. Implementation of SEMAP final rule, within 60 days of issuance.</li> <li>3. Provide timely and quality service to the approximately 9,200 households participating in the Section 8 programs. (Complete re-exams within 45 days of due date.)</li> <li>4. Administer special purpose rental assistance programs for approximately 285 families.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal met. Ended the fiscal year with a 98% lease-up rate.</li> <li>2. Goal met.</li> <li>3. Goal not met. 91% of annual recertifications were completed timely. Implementation of new regulations, and in some cases, unavailable tenant and owner information led to delays. Streamlined forms, processes, and tenant and owner education have been implemented to improve service and response time.</li> <li>4. Goal exceeded. Administered special purpose rental assistance programs for 485 families.</li> </ol>

**Property Management**

---

Eligibility

The Property Management Eligibility Unit maintains the waiting list, determines applicant eligibility, refers eligible applicants to available rental units.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Respond to waiting list correspondence of approximately 360 letters per month within seven working days.</li> <li>2. Respond to application requests of approximately 200 per month within seven working days.</li> <li>3. Schedule approximately 180 applicant interviews each month to determine eligibility for the Public Housing Program.</li> <li>4. Maintain an eligible applicant pool in excess of 75 applicants per bedroom size.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. Responded to approximately 892 letters (for both Section 8 and public housing applicants) per month within seven working days.</li> <li>2. Goal exceeded. Responded to approximately 647 application requests (for both Section 8 and public housing applicants) per month within seven working days.</li> <li>3. Goal met as revised. Interviewed 149 applicants per month to determine eligibility, maintaining lease-up rate greater than 99%.</li> <li>4. Goal exceeded. Maintained an eligible pool of approximately 96 for one-bedrooms, 117 for two-bedrooms, 137 for three-bedrooms; 56 for four-bedrooms and ten for five-bedrooms. The availability of 4 and 5 bedroom units does not require that we keep 75 applicants in the ready pool.</li> </ol>

**Property Management**

---

Occupancy

**The Property Management Occupancy Activity** includes these services for 1,659 units: lease-up of vacant units, annual recertification, interim adjustments, landlord/resident relations, administrative property management functions, and oversight of private management company.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Maintain 98% occupancy rate.</li> <li>2. Maintain 98% collection rate.</li> <li>3. Complete 99% of recertifications on time to provide 30 days prior notice to residents.</li> <li>4. Attend six community meetings with neighboring landlords and/or police to actively participate in problem resolution.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal met. Maintained an annual occupancy of 99.39% for 1,659 units.</li> <li>2. Goal met. Maintained an annual collection rate of 99.84% for 1,659 units.</li> <li>3. Goal met. Completed 99.48% of recertifications.</li> <li>4. Goal exceeded. Participated in 46 community meetings with neighboring landlords.</li> </ol>

**Property Management**

---

Routine Maintenance

**The Routine Maintenance Activity** provides for the daily routine and preventive maintenance of all Housing Commission owned and/or managed properties.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Respond to 12,500 work orders.</li> <li>2. Respond to all emergency work orders within 12 hours. .</li> <li>3. Respond to non-emergency resident requests for work within four calendar days.</li> <li>4. Have 300 vacated units ready for occupancy within six days.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. Responded to and completed 13,366 work orders.</li> <li>2. Goal exceeded. Responded to emergency work orders in an average of 3.38 hours.</li> <li>3. Goal exceeded. Responded to non-emergency resident requests in an average of 2.07 days.</li> <li>4. Goal met, as revised. Fewer residents moved out of public housing than expected, so property management had 212 vacated units ready for occupancy in an average time of 5.36 days.</li> </ol>

**Property Management**

---

Major Renovations

**The Major Renovations Activity** provides for the completion of capital improvement projects at Housing Commission owned and managed developments.

<b>Objectives</b>	<b>Accomplishments</b>
<ol style="list-style-type: none"> <li>1. Complete, with resident input, an annual plan for comprehensive improvements.</li> <li>2. Complete capital improvements at 899 Commission-owned units.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal met.</li> <li>2. Goal exceeded. Completed capital improvements to 933 Commission-owned units.</li> </ol>

**Resident Services**

Self-Sufficiency

**The Self-Sufficiency unit performs** recruitment, selection, orientation, case management, program monitoring, and data collection for resident families from the Rental Assistance and Public Housing programs. It coordinates employment training opportunities and development of supportive services. It also coordinates employment training opportunities and the development of supportive services.

Objectives	Accomplishments																					
<ol style="list-style-type: none"> <li>1. Maintain 80% of Section 8 minimum program size of 595 participants and maintain 100% of public housing minimum program size of 100 participants in the family self-sufficiency programs.</li> <li>2. Operate Move to Work, Community Opportunities, Economic Development and Support Services, ICAN, and welfare-to-work programs at contracted enrollment (2037) and outcome levels (1257).</li> <li>3. Place 150 residents in demand occupations.</li> <li>4. Place 250 residents in training for demand occupations.</li> <li>5. Increase income of residents enrolled in self-sufficiency programs by 6%.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. Maintained 94% (566) Section 8 participants and 100% (666) of public housing participants in the family self-sufficiency programs.</li> <li>2. Goal partially met. Enrollment met. Outcomes will be met by end of program year (different from fiscal year). <table border="0" style="margin-left: 40px;"> <thead> <tr> <th style="text-align: left;"><u>Program</u></th> <th style="text-align: right;"><u>Enrolled</u></th> <th style="text-align: right;"><u>Placed</u></th> </tr> </thead> <tbody> <tr> <td>M-T-W</td> <td style="text-align: right;">72</td> <td style="text-align: right;">---</td> </tr> <tr> <td>Comm. Opp.</td> <td style="text-align: right;">305</td> <td style="text-align: right;">46</td> </tr> <tr> <td>EDSS</td> <td style="text-align: right;">513</td> <td style="text-align: right;">241</td> </tr> <tr> <td>ICAN</td> <td style="text-align: right;">183</td> <td style="text-align: right;">39</td> </tr> <tr> <td>W-T-W</td> <td style="text-align: right;">1023</td> <td style="text-align: right;">670</td> </tr> <tr> <td><b>TOTAL</b></td> <td style="text-align: right;"><b>2069</b></td> <td style="text-align: right;"><b>996</b></td> </tr> </tbody> </table> </li> <li>3. Goal exceeded. Placed 224 residents in demand occupations.</li> <li>4. Goal exceeded. Placed 342 residents in training for demand occupations.</li> <li>5. Goal exceeded. Increased earned income of residents enrolled in self-sufficiency programs by 19.31%.</li> </ol>	<u>Program</u>	<u>Enrolled</u>	<u>Placed</u>	M-T-W	72	---	Comm. Opp.	305	46	EDSS	513	241	ICAN	183	39	W-T-W	1023	670	<b>TOTAL</b>	<b>2069</b>	<b>996</b>
<u>Program</u>	<u>Enrolled</u>	<u>Placed</u>																				
M-T-W	72	---																				
Comm. Opp.	305	46																				
EDSS	513	241																				
ICAN	183	39																				
W-T-W	1023	670																				
<b>TOTAL</b>	<b>2069</b>	<b>996</b>																				

**Resident Services**

Youth, Family and Senior Programs

**Youth, Families, and Senior activities** include the development and coordination of crime prevention and intervention activities, the creation and coordination of services for the learning opportunity centers, and providing information and referral services for seniors and disabled.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Continue 5% reduction in the actual incidence of crime in communities served by drug elimination programs.</li> <li>2. Operate seven learning opportunity programs and two community learning or employment centers with state-of-the-art equipment and software.</li> <li>3. Increase the school performance of 20% of youth enrolled in the learning opportunity centers and the computer literacy, basic education and employment skills of 50% of adults enrolled in the learning opportunity centers.</li> <li>4. Provide outreach to 100% of the senior and disabled residents and enroll 50% of these in activities; information and referral services; and secure stable services for 100% of the residents experiencing crisis circumstances.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. Continued reduction in the incidence of crime; burglary reduced 8.1%, and larceny reduced by 10.5%.</li> <li>2. Goal met. Operating seven learning opportunity programs and two community learning/employment centers.</li> <li>3. Goal exceeded. Of those enrolled in learning opportunity centers: 50% of children improved their school performance, and 75% of adults received computer literacy certificates.</li> <li>4. Goal met. Provided outreach to 100% of senior and disabled population at targeted public housing sites and enrolled 50% in monthly activities. Secured services for 100% of residents experiencing crisis circumstances.</li> </ol>

**Resident Services**

Resource Development & Compliance

**Resource Development and Compliance program** submits applications for governmental and private grants in order to maintain current level of Self-Sufficiency and Youth, Family and Senior programs services and maintains compliance/monitoring systems which meet the management criteria of funders and evaluative measures for policy makers.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Develop and implement a Resident Services five-year plan.</li> <li>2. Develop and implement an outcome based evaluation of all Resident Services programs.</li> <li>3. Implement the Resident Services nonprofit business plan, placing a minimum of one funded program within the nonprofit management structure.</li> <li>4. Monitor all contract agreements and Memoranda of Agreement/Understanding to maintain 100% compliance.</li> <li>5. Secure grants totaling \$1,000,000 for drug elimination, crime prevention, resident self-sufficiency, and resident employment training and retention.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal met. Five-year plan completed; new mission/vision statement in progress.</li> <li>2. Goal met. Outcome based evaluations of all resident services programs have been conducted.</li> <li>3. Goal not met. Non-profit consultant report completed. By-laws and articles of incorporation in process of being completed.</li> <li>4. Goal met. All contractors are being monitored to maintain compliance.</li> <li>5. Goal not met. Received grants totaling \$842,119. Continuing to seek grants that meet our criteria for providing services.</li> </ol>

**Rental Housing Production**

**Rental Housing** provides financing to nonprofit and for-profit entities for production or preservation of affordable rental housing, including special purpose housing, through issuance of bonds, loans, grants, contribution of land use regulation, and technical assistance. Also develops policies to encourage private sector development of affordable rental housing.

<b>Objectives</b>	<b>Accomplishments</b>
<ol style="list-style-type: none"> <li>1. Complete financing or development of 400 rental units (new, acquisition, rehabilitation), affordable at/below 60% of MAI.</li> <li>2. Create or preserve 400 rental units through Multi-Family Bond Program at/below 60% of MAI.</li> <li>3. Provide technical assistance to four nonprofits through project development assistance and provide two workshops for developers regarding rental housing development issues.</li> <li>4. Provide affordability for 125 rental and/or ownership units through land use based housing programs, such as Density Bonus, Coastal Housing, and Future Urbanizing Area affordable housing agreements and through certifying eligible projects for reduced water and sewer fees.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal not met in FY00, but far more than originally planned for are “in the pipeline.” Completed 200 units, including 46 special purpose units, with an additional 783 units approved and currently in development.</li> <li>2. Goal not met, but hundreds of rental units were approved in FY00 and will be completed in FY01. Preserved 290 rental units via bond financings with an additional 340 bond financed units approved and in development.</li> <li>3. Goal exceeded. Provided three workshops (bond workshop for local developers, “Art of Negotiation” for community partners, and bond finance workshop for staff). Provided technical assistance to 12 nonprofits. Staff training provided at bond finance workshop.</li> <li>4. Goal not met. Provided affordability for 112 units and generated \$60,608 in “in-lieu” fees (Torrey Del Mar). Master Agreement executed with final map. Several agreements in pipeline.</li> </ol>

## HOUSING POLICY, PRODUCTION & FINANCE

### Homeownership

**Homeownership** provides for technical assistance to first-time homebuyers and to private entities operating homeownership programs. Also provide housing programs and/or incentives to developers of affordable homeownership opportunities.

<b>Objectives:</b>	<b>Accomplishments:</b>
<p>1. Fund 156 First-Time Homebuyer Down-Payment grants to low-income homebuyers with particular emphasis on those within 60% MAI.</p> <p>2. Fund 172 Junior Trust Deed Loans through HOUSING COMMISSION and other first-time homebuyer programs.</p> <p>3. Issue 100 Mortgage Credit Certificates and 125 reissued MCCs.</p> <p>4. Provide underwriting services for homebuyer loans and grants, along with information and technical support for private lenders and realtors, homebuyer counseling and participation in three community homebuyer fairs.</p>	<p>1. Goal not met. Of the 156 down payment grants, 15 were to be funded through Southeastern Economic Development Corporation (SEDC) monies and 141 through Housing Commission monies. All monies except for funding for the 15 SEDC down payment grants was expended. The market precluded the achievement of SEDC's full goal, and rising housing prices required an expenditure beyond the average estimated amount for the 141 Housing Commission grants, thus enabling the Commission to finance 130 grants rather than 141.</p> <p>2. Goal not met. Of the 172 junior trust deed loans, 15 were to be funded through SEDC monies and 157 through Housing Commission monies. All monies except for funding for 13 of the 15 SEDC loans were expended. The market precluded the achievement of the goal, and it required an expenditure beyond the average estimated amount for the 157 Commission loans, thus enabling the Commission to finance 142 rather than 157 loans.</p> <p>3. Goal not met. Due to the state's delay in completing the process for allocation of bond financing in FY00, the Commission was not able to issue mortgage certificates until June 6, 2000, 24 days prior to the end of the fiscal year. However, of the 100 estimated to be issued in FY00, the Commission succeeded in issuing 49 and had 14 additional applications pending on June 30, for a total of 63, or nearly two-thirds the stated goal.</p> <p>4. Goal met. The Commission completed a fully-executed SEDC Memorandum of Understanding, sponsored and participated in two homebuyer fairs, two shared equity classes for lenders, and several first-time homebuyer workshops.</p>

**Rehabilitation**

---

Rental Housing

**Rental Housing Rehabilitation** provides technical and financial assistance for the rehabilitation of privately owned housing occupied by low-income renters.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Provide low-interest loans for the rehabilitation of 25 renter occupied housing units.</li> <li>2. Provide technical assistance and loan underwriting to support lending.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal not met. Provided low interest loans for rehabilitation of 20 renter occupied housing units. Large project delayed due to HUD processing; will be completed in FY01.</li> <li>2. Goal met. Provided technical assistance to 181 renter occupied housing units.</li> </ol>

**Rehabilitation**

Owner Occupied

**Owner Occupied Rehabilitation** provides financial and technical assistance to low-income owners wishing to rehabilitate their owner-occupied housing and to nonprofit entities who assist such owners.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Provide financial assistance in the rehabilitation of 402 owner-occupied units consisting of:                             <ul style="list-style-type: none"> <li>• Loans for 50 units of owner-occupied one- to four-unit complexes.</li> <li>• Grants for 192 units of owner-occupied single-family properties.</li> <li>• Grants for 160 owner-occupied mobile homes.</li> </ul> </li> <li>2. Provide technical assistance (work write-ups, cost estimates and construction monitoring) and loan underwriting services to support financial assistance.</li> <li>3. Finance repairs to 700 units through CDBG support for nonprofit entities.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal met. (96%). Provided financial assistance in the rehabilitation of 385 owner occupied units consisting of:                             <ul style="list-style-type: none"> <li>• Loans for 44 units of owner occupied one- to four-unit complexes</li> <li>• Grants for 125 units of owner occupied single family properties</li> <li>• Grants for 206 owner occupied mobile homes</li> <li>• Timelines for completion of owner occupied grants were negatively impacted by lack of funding availability.</li> </ul> </li> <li>2. Goal met. Provided technical assistance (work write-ups, cost estimates and construction monitoring services) to support financial assistance to 108 units.</li> <li>3. Goal exceeded. Financed repairs to 777 units through CDBG support for nonprofit entities.</li> </ol>

**Portfolio Servicing and Occupancy Monitoring**

**Portfolio Servicing and Occupancy Monitoring** includes servicing and administration of the Housing Commission’s \$54 million loan portfolio and \$399 million bond portfolio. Monitoring projects for compliance with occupancy and affordability restrictions and managing the Housing Commission’s relocation/tenant assistance program are also included.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Service 1,700 loans in Housing Commission's portfolio to ensure that all loans are current, taxes are current (for major loans of more than \$100,000), and insurance is in force; in addition, handle assumptions, reconveyances, payoffs, and general customer service.</li> <li>2. Monitor contracts/loan agreements covering 10,200 units to ensure compliance with affordability and occupancy restrictions.</li> <li>3. Structure loan workouts, modify troubled loans, and foreclose on nonperforming loans to protect Housing Commission interests.</li> <li>4. Perform contractual obligations required of the Housing Authority as the bond issuer for \$399 million bond portfolio.</li> <li>5. Provide relocation and tenant assistance to Housing Commission activities, as needed.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. Serviced a loan portfolio of approximately 2,050 loans totaling \$62,706,867.</li> <li>2. Goal met. Monitored contracts/loan agreements covering 10,474 units to ensure compliance with applicable restrictions.</li> <li>3. Goal met. All aspects of loan servicing were performed.</li> <li>4. Goal met. Staff interfaced with bond trustees, ensured all reporting requirements for each issuance were met and all administrative fees were collected.</li> <li>5. Goal met. Throughout the year, 94 tenant notices and one project notice were issued, and 9 waivers of relocation assistance were obtained.</li> </ol>

## HOUSING POLICY, PRODUCTION & FINANCE

### **Special Purpose Housing**

**Special Purpose Housing** includes the provision of funding to support affordable housing activities for persons with special needs. Transitional housing, group housing, rental assistance, shared housing program, and supportive housing programs are examples of the types of housing and related services provided in this activity. Also included are the Housing Commission's contributions to City of San Diego homeless assistance activities and citywide efforts to provide shared housing and other human services.

<b>Objectives</b>	<b>Accomplishments</b>
<ol style="list-style-type: none"> <li>1. Provide financing for the operation of 500 transitional housing beds for one year.</li> <li>2. Provide financing for the development and/or operation of 20 special purpose beds/rental housing units.</li> <li>3. Complete 28 units of special purpose housing.</li> <li>4. Provide financing for the development and/or operation of 60 special purpose beds/rental housing units.</li> <li>5. Assist 440 persons with supportive housing services.</li> <li>6. Underwrite cost of City of San Diego's Homeless Coordinator, Cold Weather Shelter Program, Regional Task Force on the Homeless and other services.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. Financed 666 Transitional Housing Beds including Becky's House. Received national HUD award and ALHFA award for Parker-Kier.</li> <li>2. Goal exceeded. Completed financing for 52 special purpose beds/rental housing units including Stepping Stone and Vietnam Veterans.</li> <li>3. Goal exceeded. Completed 46 units of special purpose housing including:               <ul style="list-style-type: none"> <li>• Stepping Stone – 28 units. Residential recovery facility for primarily gay/lesbian adults recovering from drug and alcohol abuse.</li> <li>• Vietnam Veterans – eight units. Transitional housing for homeless. Veterans primarily single; however, those with families are eligible also.</li> <li>• Sanctuary Project – ten units. Conversion of a severely blighted apartment building into safe, affordable housing for homeless victims of domestic violence.</li> </ul> </li> <li>4. Goal exceeded. Provided for 176 beds/units. Women's and Children's Transitional Living Continuum provided 60 units. TakeWing provided 88 beds. Safe Havens (ECS) provided 28 beds. In addition ElderHelp provided 81 shared housing matches, which is the equivalent of assisting 33 people with housing on a year-round basis</li> <li>5. Goal met. 440 persons served by Supportive Housing Programs.</li> <li>6. Goal exceeded. The Housing Commission provided FY00 funding for all noted activities, including a substantial increase over the amount budgeted for the 99/00 winter shelter. This increase helped the veterans and singles components of the 99/00 winter shelter to remain open for an additional month and the family component to remain open for an additional two months.</li> </ol>

## HOUSING POLICY, PRODUCTION & FINANCE

### **Resource Development & Compliance**

**Resource Development & Compliance** activity involves the pursuit of funding and additional resources for affordable housing programs. Submitting the Consolidated application for CDBG, HOME, ESG, and HOPWA funds and negotiating reinvestment plans with lenders for consideration by the Reinvestment Task Force are examples of the types of resources pursued in this activity. Also included is identifying, cataloguing and providing access to information for internal and external customers relative to industry-wide trends, programs, and players. Also identifies new funding sources and technical assistance which can be utilized for affordable housing and related activities. In addition, this activity involves oversight of a wide variety of funding programs to ensure compliance with regulatory requirements.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Prepare or assist in preparing one application for federal, state and/or private funding to support affordable housing and related activities. Upon approval, prepare, execute, and monitor relevant contracts.</li> <li>2. Coordinate preparation of a new five-year Consolidated Plan in partnership with the city to secure federal funds for San Diego. Also coordinate one five-year Agency Plan to secure public housing and rental assistance funds.</li> <li>3. Generate additional administrative fees from an estimated four bond issuances.</li> <li>4. Provide all required reports regarding program performance to federal, state, and/or private funding sources and ensure compliance with program standards.</li> <li>5. Negotiate one or more reinvestment plans with new or existing lenders operating in San Diego, and monitor existing reinvestment plans for compliance.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. 13 new FY00 CDBG contracts brought into service. Received \$5.3 million from Homeless Continuum of Care Funding and Individual Development and Empowerment Account Funding. Submitted applications for FY01 funding.</li> <li>2. Goal met. The five-year Consolidated Plan and the Agency Plan were successfully completed and approved.</li> <li>3. Goal exceeded. Generated \$180,210 in additional administrative fees from five bond issuances. Also generated \$89,435 through the MCC and the RMCC programs.</li> <li>4. Goal met. All required reports compiled and transmitted for performance data for FY00 Consolidated Plan Performance Report. Prepared three-year Housing Trust Fund Program plan.</li> <li>5. Goal met. New reinvestment plans developed with US Bancorp, Guaranty Savings, and California Federal Bank.</li> </ol>

**Board & Executive Functions**

**Board & Executive Functions** is responsible for providing effective policy direction to the agency, developing efficient programs and practices, assuring their implementation in a manner that carries out the Vision, Mission and Goals of the agency, and performing periodic evaluation of program effectiveness and efficacy. Provides direct support to the Board of Commissioners. Chief Executive Officer and Directors and their immediate support staffs as well as docket support and policy development staff are included.

<b>Objectives</b>	<b>Accomplishments</b>
<p>1. Implement Management Themes of:</p> <ul style="list-style-type: none"> <li>• Neighborhood Partnerships</li> <li>• Organizational Excellence</li> <li>• Managing for the Future</li> </ul> <p>2. Develop comprehensive policy recommendations including the annual Consolidated Plan and General Plan Housing Element revisions, in cooperation with City staff, and secure approval from City Council and HUD.</p> <p>3. Provide board reports in a timely and thorough manner.</p>	<p>1. Neighborhood Partnerships</p> <ul style="list-style-type: none"> <li>• Goal met. During Fiscal Year 00, the Housing Commission provided representation on an array of committees, task forces, and boards, thereby expanding our neighborhood, city/county and state-wide partnerships around affordable housing. The Housing Commission also embarked on a strategy to expand relationships with the business community this fiscal year. Further, it convened an affordable housing workshop in March.</li> <li>• Goal met. Reorganization planned to organize around functions, intra-agency communication and training strengthened, and performance standards updated. Internal systems continue to be upgraded/streamlined.</li> <li>• Goal met, as explained in a. and b. above. Also, management team engaged in a strategic planning session in FY00 at which five major goals were developed.</li> </ul> <p>2. Goal met. During this Fiscal Year, the City Council approved a new Five-year Consolidated Plan for the period extending through FY06. Part of this plan, a new Consolidated FY01 Annual Plan, generated \$28 million in new federal funding. Additionally, the City Council authorized submission of a new five-year Housing Element, for the period covering FY99 to FY04. The new Housing Element includes some major new policy initiatives to expand affordable housing.</p> <p>3. Goal met. Both the Housing Commission and the Housing Authority docket were distributed in a timely manner to allow review by the appropriate body.</p>

**Board & Executive Functions (continued)**

---

<b>Objectives</b>	<b>Accomplishments</b>
4. Analyze and advocate state and federal legislative proposals to further mission and goals.	4. Goal met. The Housing Commission analyzed multiple state and federal affordable housing bills, secured Land Use & Housing adoption of a 2000 affordable housing legislative agenda, provided testimony before the State Assembly Committee on Housing and Community Development, and participated in various other legislative forums. The Housing Commission also helped to secure approval of a \$500 million state affordable housing FY01 budget.

**Support Services**

Human Resources

**Human Resources** provides a human resources system for the selection, staffing, and development of personnel to support Housing Commission program resource needs. Services include employee classification, and pay administration, recruitment, hiring, performance evaluation, and staff advancement. Establishes and maintains salary and benefit systems, employee and labor relations, pension administration, training, safety, threat assessment, workers compensation, health/wellness programs, temporary employment services, and volunteer and internship programs.

Objectives	Accomplishments																																				
<p>1. a) Reduce by 5% the number of days to fill positions with qualified candidates for 95% of all vacancies.                      b) Increase the number of residents, volunteers, interns and trainee placements by 10% to maximize staffing options.                      c) Process 100% of 30 temporary help placements within 48 hours.</p> <p>2. Administration of Employee Salary, Pay, Performance and Benefits Action: Review, analyze, and initiate approximately 1,600 actions to payroll by payroll deadline.</p> <p>3. Workforce Safety/Workers' Compensation &amp; Wellness Programs: Provide a minimum of 15 Workers' Compensation, Safety, Threat Assessment Team, and Wellness activities for a minimum total of 500 participants.</p> <p>4. Training: Partner with the City Centre for Organizational Effectiveness to provide 26 focused trainings on agency and employee development, process improvement and service delivery for participants in following areas:</p> <table border="0" data-bbox="205 1008 955 1242"> <thead> <tr> <th><u>Trainings</u></th> <th><u>Participants</u></th> <th></th> </tr> </thead> <tbody> <tr> <td>(9)</td> <td>240</td> <td>Organizational Development &amp; Effectiveness</td> </tr> <tr> <td>(3)</td> <td>47</td> <td>Management and Supervision</td> </tr> <tr> <td>(5)</td> <td>150</td> <td>Technical Skills</td> </tr> <tr> <td><u>(9)</u></td> <td><u>240</u></td> <td>Customer Service</td> </tr> <tr> <td>(26)</td> <td>677</td> <td>Total (28.5% participant increase over FY99).</td> </tr> </tbody> </table> <p>5. Process Improvement: Improve organizational development efforts through one-on-one coaching, team building and improvement of six personnel systems for agency efficiency</p>	<u>Trainings</u>	<u>Participants</u>		(9)	240	Organizational Development & Effectiveness	(3)	47	Management and Supervision	(5)	150	Technical Skills	<u>(9)</u>	<u>240</u>	Customer Service	(26)	677	Total (28.5% participant increase over FY99).	<p>1. a) Goal met. 50 % reduction for 95% of all vacancies.                      b) Goal met.                      c) Goal exceeded. 76 of 77 placements (99%) processed within 48 hours.</p> <p>2. Goal met, within acceptable margin (1620), 97%, by deadline.</p> <p>3. Goal exceeded. 39 sessions conducted with 630 participants.</p> <p>4. Goal exceeded.</p> <table border="0" data-bbox="1192 954 1921 1209"> <thead> <tr> <th><u>Trainings</u></th> <th><u>Participants</u></th> <th></th> </tr> </thead> <tbody> <tr> <td>(22)</td> <td>176</td> <td>Organizational Development &amp; Effectiveness</td> </tr> <tr> <td>(25)</td> <td>317</td> <td>Management and Supervisor</td> </tr> <tr> <td>(16)</td> <td>271</td> <td>Technical Skills</td> </tr> <tr> <td><u>(17)</u></td> <td><u>498</u></td> <td>Customer Service</td> </tr> <tr> <td>(80)</td> <td>1,262</td> <td>(73% increase over FY99)</td> </tr> </tbody> </table> <p>5. Goal exceeded: Implemented 83 improvement efforts and seven personnel system improvements.</p>	<u>Trainings</u>	<u>Participants</u>		(22)	176	Organizational Development & Effectiveness	(25)	317	Management and Supervisor	(16)	271	Technical Skills	<u>(17)</u>	<u>498</u>	Customer Service	(80)	1,262	(73% increase over FY99)
<u>Trainings</u>	<u>Participants</u>																																				
(9)	240	Organizational Development & Effectiveness																																			
(3)	47	Management and Supervision																																			
(5)	150	Technical Skills																																			
<u>(9)</u>	<u>240</u>	Customer Service																																			
(26)	677	Total (28.5% participant increase over FY99).																																			
<u>Trainings</u>	<u>Participants</u>																																				
(22)	176	Organizational Development & Effectiveness																																			
(25)	317	Management and Supervisor																																			
(16)	271	Technical Skills																																			
<u>(17)</u>	<u>498</u>	Customer Service																																			
(80)	1,262	(73% increase over FY99)																																			

**Support Services**

Fiscal Services

**Fiscal Services** provides accounting services such as payroll, accounts payable, revenue and expense analysis and projection, certification of funds, budget enforcement and financial reporting. The activity also includes audit and financial systems.

Objectives	Accomplishments
<p>1. Accounting Services: a) To process 100% of payrolls on time and to process invoices within 30 days of receipt in our office. b) To ensure commitment of funds is within availability and budget. c) To accurately complete reports to financial management and funding sources in accordance with established requirements and time frames.</p> <p>2. Audit: To complete fiscal year-end close by September 30 and to assist the independent auditors in the completion of a clean annual audit.</p> <p>3. Financial Systems: To further refine modules of the new financial software system that were implemented in FY99 in order to improve purchasing and accounts payable processes and provide timely information to agency departments. Also, to implement additional modules according to schedule as approved by the PeopleSoft Steering Committee.</p>	<p>1. a) Goal met. 100% of payrolls were processed on time, and invoices were processed within 30 days of receipt. b) Goal met. Auditors Certificates, which ensure fund and budget availability, were properly issued as requested. c) Goal not met. First quarter reports to Financial Management were delayed due to the closing of FY99, accomplished for the first time using our new financial management software system. Second, third and fourth quarter reports were completed within the established timeframes. Required reports to funding sources were completed within established timeframes or within approved extensions.</p> <p>2. Goal not met. Year-end close was completed ten days late due to required revisions prior to close of funds. Staff assisted the independent auditors in the completion of annual audit. There was one reported finding, and there were no management comments.</p> <p>3. Goal met. In order to provide timely information to agency departments, monthly report distribution was standardized to the 10<sup>th</sup> of the following month. In addition, a report manual was developed, and report training was held for managers and designated staff. Implementation of additional PeopleSoft modules is pending release of a new version of product.</p>

**Support Services**

Information Systems Support

**Information Systems** establishes and evaluates information technology, products and services. Develops and maintains information systems to support business and technical needs of Housing Commission programs. Services include application development and maintenance, data base management, network and user support, and training.

Objectives	Accomplishments
<p>1. <b>Quality Information Technology:</b> Maintain a state-of-the-art system to address agency information needs including financial systems, resident and housing characteristics, geographical information and other programmatic data.</p> <ul style="list-style-type: none"> <li>a. Ensure that all Commission hardware and software systems are Year 2000 compliant by 12/31/99.</li> <li>b. Coordinate the implementation of the new Year 2000 compliant PeopleSoft budget development module by 01/31/00.</li> <li>c. Implement a new long-term electronic messaging and collaboration system by 5/31/00.</li> </ul> <p>2. <b>Planning:</b> To implement the Commission's Technology Agenda. The intent is to identify housing program and information technology industry trends, which should be addressed by the Commission, including Year 2000 (Y2K) compliance. Develop an annual update of the Commission's Technology Agenda by 1/31/00.</p> <p>3. <b>Internet:</b> To improve internal and public access to Commission information through the Intranet and the World Wide Web. Provide internal access to selected Commission database through the Intranet by 5/31/00.</p>	<p>1. <b>Quality Information Technology:</b> two of three goals met.</p> <ul style="list-style-type: none"> <li>a. Goal met. Year 2000 status: successfully completed. No significant disruptions in service.</li> <li>b. Goal not met due to need to await product upgrades.</li> <li>c. Goal met.</li> </ul> <p>2. Goal met. Technology agenda status is complete.</p> <p>3. Goal met. Internet status is complete. External web site published (<a href="http://www.Housing Commission.net">www.Housing Commission.net</a>). Job announcements, RFPs, HA &amp; HC agendas, reports and minutes, and Consolidated Plan now available on web site. Number of Housing Commission employees with access to the Intranet has increased by 90%. Number of pages on the Intranet has increased by 125%.</p>

**Support Services**

Financial Management

**Financial Management** provides: Budget: Administers the preparation and execution of the agency budget; analyzes proposed uses of fiscal resources for compliance with Housing Commission policies and funding source requirements; performs revenue and expense forecasting and performance monitoring; develops and maintains preparation of the cost allocation system and responds to Housing Commission and Chief Executive Officer requests for information.

Investments and Cash Management: This area provides cash management services for the Housing Commission, including the maintenance of banking and investment relationships, the review of deposit and disbursement procedures, the investment of cash balances with attention to safety, liquidity and yield, and allocation of interest revenue.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. <u>Budget Development</u>: To assist Housing Commission in developing an annual activity-based budget for approximately 30 activities that maximize service per expenditure.</li> <li>2. <u>Budget Administration</u>: To analyze budget variance and report quarterly status on Housing Commission expenditures and revenues. Also, reconcile actual carryover with estimated carryover and provide assistance in developing budget revisions.</li> <li>3. <u>Special Projects</u>: To provide information and/or support to the Housing Commission, Chief Executive Officer and division management by completing 90% of all special projects and analysis within specified deadline.</li> <li>4. <u>Cash Management</u>: Invest funds, while preserving principal, to ensure a yield equal to or greater than 90% of the 90-day T-Bill rate.</li> <li>5. <u>Financial Systems</u>: To develop and implement the budget module of the new financial system.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal met. Balanced activity based budget that maximizes services per expenditure in the amount of \$107 million was approved on June 6, 2000, by the Housing Authority.</li> <li>2. Goal met. Prepared budget reconciliation of actuals, various revisions and the four quarterly budget status reports. This ensured that the Housing Commission expenditures conformed with Housing Authority-approved budget and current year revenues, and were within forecasted levels.</li> <li>3. Goal met. Provided information and supported the Housing Commission, Chief Executive Officer and division management by completing 170 of 191 projects, or 89%, within specified deadline.</li> <li>4. Goal exceeded. Invested funds while preserving principal earning 5.294% vs. 4.513% for the 90-day T-Bill rate. This is 20.20% greater than the 90-day T-Bill rate and 33.56% greater than goal.</li> <li>5. Goal not met. The earlier version of the PeopleSoft budget module was deemed to be inadequate by users. It was enhanced by PeopleSoft, but the release date did not occur until very late in FY00.</li> </ol>

**Support Services**

Equal Opportunity & Contracting

**Equal Opportunity & Contracting** administers equal opportunity and affirmative action programs. Solicits and awards procurement contracts to competitive and qualified sources to support housing program needs. Administers purchasing and risk management programs for the Housing Commission. Establishes and maintains a records management system for the agency.

Objectives	Accomplishments
<p>1. Contracting Program: To achieve a total customer satisfaction rating of 90% by the fourth quarter of FY00 as determined by an internal customer survey.</p>	<p>1. Goal met as revised. An initial survey was begun in early FY00 to determine customer satisfaction. However, a division-wide "Customer Dialogue" process replaced the original plan. Two major outcomes of these combined processes were: a) improved customer communications and b) increased customer awareness of available services.</p>
<p>2. Equal Opportunity Contracting Program: a) Provide technical assistance to a minimum of 250 small businesses, through individual counseling, group training or appropriate referrals by 6/30/00. b) Maintain a contract tracking system by name of contractor by 6/30/00 for agency-wide utilization.</p>	<p>2. Goal met. a) Technical assistance was provided to over 300 targeted businesses. b) Goal met. Staff developed an agency-wide contract tracking system, but agency-wide access to this data will not occur until 2<sup>nd</sup> quarter FY01.</p>
<p>3. HUD Section 3 Program: Establish partnerships with a minimum of 20 businesses for the purpose of employment, training and/or contracting opportunities for Section 3 area residents by 6/30/00.</p>	<p>3. Goal not met. Six partnerships were established. An MOU with the City of San Diego will aid in increasing the number of working partnerships by expanding the pool of potential firms. Staff has been successful in matching available job opportunities with these firms with ready, willing and able residents seeking employment.</p>
<p>4. Risk Management Program: To reduce agency's liability claims by 10% through increased dissemination of risk prevention literature materials to all residents.</p>	<p>4. Goal met. Liability claims to Housing Authority Risk Reduction Group (HARRG) reduced from one claim in FY99 to no claims in FY00. In addition, received from the HARRG a "Certificate of Achievement" for successful completion of Agency Annual Risk Control Work Plan. As a result, a 10% discount to the Commission's general liability insurance premium was realized.</p>
<p>5. Records Management Program: Conduct survey of 50% of agency documents to determine appropriate disposition.</p>	<p>5. Goal met. 75% of Record Series (types of records) were reviewed. In addition, Record Management Policy, Administrative Regulation and Record Retention Schedule drafts are currently being reviewed for implementation.</p>

**Support Services**

---

Equal Opportunity & Contracting (continued)

<b>Objectives</b>	<b>Accomplishments</b>
6. Purchasing: a) To fully implement the PeopleSoft "Purchase Order" Program for tracking purchase orders and work requests, work progress, on-line requisitions, fixed assets (budget checking) and inventory. b) Process 95% of customer requests for equipment, materials, supplies and non-professional services within established time frames.	6. a) Goal not met. Implementation of the Fixed Asset and Inventory Module to be rescheduled. Schedule to be determined based on Generally Accepted Accounting Principles (GAAP) conversion and upcoming Housing Services software implementation. b) Goal met. Over 95% of all customer requests were completed within targeted response time and usually exceeded customer expectations.

**Support Services**

---

Facilities Management

**Facilities Management** oversees physical management of Newton offices and warehouse site.

<b>Objectives</b>	<b>Accomplishments</b>
Facilities Program: To conduct a current and future facilities needs assessment for the Newton Avenue office and warehouse location.	Goal met. A subcommittee of the board working with Keyser Marston Associates to analyze office facility options was created to present recommendations to Housing Commission and Housing Authority in FY01.

**Community Relations**

**Community Relations** opens channels of communication between the Housing Commission and its publics -- including clients, commissioners, government officials, the media, the public at large, and agency staff -- to educate external publics about affordable housing issues and to inform internal publics about current events and concerns. Activities include publicity, special events, publications, and requests for information from the media and the public. Includes ombudsman who assists in resolving customer and neighborhood concerns.

Objectives	Accomplishments
<ol style="list-style-type: none"> <li>1. Build support of business community and community leaders for affordable housing and understanding of Housing Commission programs through targeted informational meetings, speakers bureau engagements, and assistance at trade/business show fairs. Goal: ten meetings/speakers bureau engagements; four fairs</li> <li>2. Take lead in written communications for agency: write, design, and print internal and external communications. Goal: 20 employee newsletters; 20 Council and Commissioner memos; update two brochures; one annual report; two newsletters to community leaders.</li> <li>3. Community liaison: Ombudsman will assist customers with problems or concerns and work with community groups on affordable housing and neighborhood issues.</li> <li>4. Initiate organizational process improvements based upon customer feedback: research, disseminate results of research, make recommendations, and execute improvement plans. Goal: 100 customers contacted for research purposes; two process improvement initiatives.</li> <li>5. Media relations: inform the media and, through it, the public of affordable housing issues and Commission programs. Respond to media inquiries and suggest educational feature stories. Goal: 50 feature stories about San Diego Housing Commission.</li> </ol>	<ol style="list-style-type: none"> <li>1. Goal exceeded. 26 meetings/speakers bureau engagements, one fair, one inter-agency (EDC, Nonprofit Federation, Chamber, BIA, Apartment Association) educational effort meeting, one development partners -- commissioners meeting.</li> <li>2. Goal met, as revised, with substitution of a new newsletter for rental property owners (two completed in FY00) and a monthly Housing Commission newspaper column (two completed in FY00). Also: ten employee newsletters, five HA memos, seven HC memos, two RAP newsletters, one holiday card, two brochures, one annual budget presentation, one annual report.</li> <li>3. Goal met. Responded to 3,069 inquiries/concerns, 110 customers at community centers.</li> <li>4. Goal exceeded. Over 25,000 contacted in three process improvement efforts.</li> <li>5. Goal exceeded. 79 features printed or broadcast.</li> </ol>