

Santa Fe County Housing Authority Board
May 28, 2013
Legal Conference Room
10:00 a.m.

AGENDA

- | | | |
|--------------|---|---|
| I. | Call to Order | |
| II. | Roll Call | |
| III. | Introductions | |
| IV. | Approval of Agenda | (Action) |
| V. | Approval of Minutes | (Action) |
| VI. | Approval of a MOU between Santa Fe Civic Housing Authority and Santa Fe County Housing Authority | (Discussion and Possible Action) |
| VII. | Family Self-Sufficiency (FSS) Program Presentation | (Discussion) |
| VIII. | Housing Authority Updates: | (Discussion) |
| | (a) Site Improvement Plan/CFP Update | |
| | (b) Vacancy Update | |
| | (c) Director's Report | |
| IX. | Public Comments | (Discussion) |
| X. | Matters from the Board | (Discussion) |
| XI. | Executive Session Regarding Limited Personnel Issues – Discussion of Appointment of a Community Board Member | (Discussion) |
| XII. | Appointment of a Community Board Member | (Possible Action) |
| XIII. | Adjournment | |

MINUTES OF THE
SANTA FE COUNTY
HOUSING AUTHORITY BOARD

April 30, 2013

This meeting of the Santa Fe County Housing Authority was called to order on the above-cited date in the Santa Fe County Legal Conference Room, at the County Courthouse at approximately 10:15 a.m. by County Commission Chair Kathy Holian.

Roll call indicated the presence of a quorum with the following Board members present:

Members Present:

Kathy Holian, Commissioner
Robert Anaya, Commissioner
Miguel Chavez, Commissioner
Liz Stefanics, Commissioner
Frances Ong, Resident Member

Member(s) Excused:

Danny Mayfield, Commissioner
[One vacancy]

Staff Present:

Katherine Miller, County Manager
Rachel Brown, Deputy County Attorney
Ron Pacheco, Housing Authority Director
Penny Ellis-Green, Growth Management Department
Victor Gonzales, Housing Staff
Deanna Lopez, Housing Administrator
Tracey Young, Senior Accountant
Steve Brugger, Affordable Housing Director
Tim Vigil, Assistant County Attorney
Molly Saiz, Finance
Lisa Roybal, County Manager's Office

Other Present:

Joseph Loewy, Board Candidate

III. Introductions

Those present introduced themselves.

IV. Approval of Agenda

Noting that Commissioner Mayfield was excused because of jury duty and that he wanted to participate in the selection of a new community board member, Commissioner Anaya amended the agenda tabling items X and XI. Commissioner Chavez seconded and the motion passed by unanimous [5-0] voice vote.

V. Approval of Minutes: March 26, 2013

An error was noted on page 3, first paragraph, striking the word not: It was agreed that none of the special program vouchers, for instance those for veterans, would ~~not~~ be included in the count.

Commissioner Stefanics moved to approve the minutes as corrected. Her motion was seconded by Commissioner Anaya and passed by unanimous [5-0] voice vote.

VI. Approval of Resolution 2013-05HB: A Resolution Approving Santa Fe County Housing Authority's Payment Standards

Mr. Pacheco said the Board is charged to approve the payment standards annually. Staff has reviewed the current average contract rents for the units under a Housing Assistance Payment Contract and has determined that the payment standards be established at 90 percent of the published FMR with the exception of the one bedroom payment standards which will be set at 95 percent. He pointed out that the Code of Federal Regulations requires that housing authorities adopt payment standards for each fair market rent area in the authority's jurisdiction.

Mr. Pacheco noted that Sequestration has caused a loss in HUD funding which he estimated at 20 percent. Staff developed payment standards that addresses the reduced HUD funding and maintains affordable housing.

Ms. Young said payment standards must be at 90 percent of what HUD sets as fair market or 110 percent of the fair market. With one exception, the five unit sizes are at the lowest possible rate.

Commissioner Anaya understood that if the rents are not in sync with the local area HUD's calculations could be reevaluated. He said he would like to discuss this issue further with staff.

Commissioner Anaya moved to approve Resolution 2013-05HB as presented. His motion was seconded by Commissioner Chavez and passed by unanimous [5-0] voice vote.

VII. Housing Authority Updates

A. Site Improvement Plan/CFP Update

Project Manager Victor Gonzales reported on the following items:

- A resurvey for the main sewer line at the Jacob D. Martinez site is scheduled for next

week.

- Re-roofing of Valle Vista units has begun
- Abatement and renovation of a Santa Cruz unit is moving forward.

Commissioner Anaya requested a matrix delineating the number of units abated, sold, renovated and other specifics.

B. Vacancy Update

Mr. Pacheco said when the report was printed the vacancy rate was 96 percent. He mentioned that the agency was short staffed this month and he was pleased the vacancy rate was holding.

Commissioner Anaya expressed concern about the number of evictions and abandonments and requested that the agency's program staff dealing with self-sufficiency and job training attend the next Authority meeting. He said a reinvigoration of those programs may be necessary. Mr. Pacheco said staff will present the successes as well as challenges within the program.

Regarding the units that have been vacant for approximately 100 days, Mr. Pacheco said the issue is maintenance/remodeling. Mr. Gonzales said it takes time to get a contractor to renovate a unit as does the installation of features for the disabled.

Noting there were major improvements necessary, Commissioner Stefanics said the Authority needs to discuss the future of Valle Vista. Mr. Pacheco said all the units in Valle Vista are slated for sale; however, because they are in such poor condition they are not marketable. He suggested renting them and seeking subsidy to rehabilitate them. Commissioner Stefanics suggested the sale price could be reduced for the current tenants.

Commissioner Chavez said the older units will continue to cost the County money and he suggested flexibility with a lease option to buy and the notion of sweat equity.

Commissioner Anaya said he'd like to sell the older units and create an inventory of units that are easier to manage. He recommended reopening the discussion on the strategies of home sales and using the profits to build rental units. Mr. Pacheco said he would develop historical data for the next meeting to help the Authority consider plans for the sites.

C. Director's Report

Mr. Pacheco announced that Victor Gonzales was recognized as the Maintenance Employee of the Year by New Mexico NAHRO (National Association of Housing, Redevelopment). The Authority and those present congratulated Mr. Gonzales. A proclamation would be prepared and an announcement would be forwarded to NMAC.

Mr. Pacheco said the negotiations with Santa Fe Civic Housing Authority continue to be

challenging. Ms. Young said the County currently has 150 vouchers within the City of which 30 have been ported to City/Civic Housing. Civic Housing has approximately 63. Without a signed agreement, Civic Housing will have to send the Authority the 63 vouchers for administering. The County has more exposure in the current set up and the City has a greater inventory. She noted that the boundaries continue to change in the City's favor. Ms. Young said there were other options the Authority was exploring as part of the agreement.

Commissioner Anaya said he opposed permitting the City to dictate who the County serves.

Mr. Vigil said the City was interested in the Cook property. He referred to a 1999 agreement and obligations to port. Ms. Miller said the new agreement has some good points clearing up ambiguities. She too took issue with Civic Housing dictating where and what population the County should target.

Commissioner Stefanics said she wanted the agreement to be balanced. She asked that the legal department, housing and the manager's office return to the Authority with a specific recommendation for action. Mr. Pacheco said he would forward the agreement and information to the Authority for review.

Commissioner Chavez spoke as a proponent of erasing the jurisdictional lines and serving the population.

Mr. Pacheco said overall the Federal Sequestration has had little effect on Public Housing and Housing Choice Vouchers.

Mr. Pacheco reported on the Linkages program and said the program has been very difficult to administer because LifeLink is not provided adequate casework management. The invitation to bid on the program is coming up and staff is concerned that without adequate case management the safety of the other residents may be jeopardized.

Ms. Young said LifeLink has a contract with MFA for the caseworker and the Authority has the housing side with MFA. Staff is considering not applying for the program.

Commissioner Anaya said this is a policy issue that should be brought before the Authority before a decision is made.

Mr. Pacheco said the contract requires the Authority to rely on inadequate case management. The landlords housing these clients are upset because their property is being destroyed. He said the money for this contract is very low and does not adequately fund the program – basically the Authority manages a landlord program.

Commissioner Stefanics asked that staff investigate whether detention staff can serve as case management. Ms. Miller said she needs to review the issue further and would talk to Mr.

Sedillo. Commissioner Stefanics suggested that the behavioral health providers contracted through the Indigent Fund could assist in this program.

Mr. Pacheco said staff could apply for the funds and work through the detail in the future, he emphasized that his concern was the County's liability in this issue. Commissioner Anaya suggested staff phone DFA and request an extension to the deadline. Ms. Young pointed out that the RFP was issued less than two weeks ago.

Commissioner Anaya asked that in the future, staff keep the Authority apprised of problem programs.

Chair Holian requested that staff provide a history of the program outlining the problems.

XIII. Public Comments

Joseph Loewy, Board Candidate, complimented the Authority on the degree of detail and their support for the director and housing staff.

IX. Matters from the Board

Chair Holian encouraged staff to continue to promote the community gardens. She suggested staff tap into Santa Fe's community of gardeners.

X. Executive Session: Limited Personnel Matters

XI. Appointment of a Community Board Member

These two items were tabled.

XII. Adjournment

Having completed the agenda and with no further business to come before the Authority, this meeting adjourned at approximately 11:25 a.m.

Approved by:

Kathy Holian, Commission Chair
Housing Authority Board

ATTEST TO:

GERALDINE SALAZAR
COUNTY CLERK

Submitted by:
Karen Farrell, Wordswork

**COOPERATIVE AGREEMENT
BETWEEN
SANTA FE CIVIC HOUSING AUTHORITY
AND THE
SANTA FE COUNTY HOUSING AUTHORITY
FOR MUTUAL COOPERATION IN THE
ADMINISTRATION OF TENANT BASED VOUCHERS**

THIS COOPERATIVE AGREEMENT (hereinafter "Agreement") is entered on this _____ day of _____ 2013, by and between the Santa Fe Civic Housing Authority, Inc., a nonprofit domestic corporation (hereinafter "Authority"), and the Santa Fe County Housing Authority, an instrumentality of Santa Fe County (hereinafter the "County HA").

RECITALS

WHEREAS, the Authority and the County HA are agencies and instrumentalities of their respective governing bodies and have been duly created pursuant to the laws of the State of New Mexico;

WHEREAS, the Authority and the County HA have the mutual goal of providing and making available safe, decent, and affordable housing to low income and very low income residents of the City of Santa Fe and Santa Fe County;

WHEREAS, in 1999 the Authority and the County HA entered into a Cooperative Agreement that provided for the cooperation between the parties to administer their respective tenant based voucher programs; currently known by as the "Housing Choice Voucher Program," which is supported by funds and subsidies from the U.S. Department of Housing and Urban Development ("HUD");

WHEREAS, due to the changes in the jurisdictional boundaries of both the Authority and the County HA since 1999 and the increased need for housing assistance from citizens, including veterans of the City of Santa Fe and Santa Fe County, the parties mutually agree to terminate the 1999 Cooperative Agreement and enter into this Agreement which supersedes the 1999 Agreement;

WHEREAS, the Authority and the County HA desire to have their agreement regarding the administration of their tenant based voucher programs within each parties' jurisdictional boundaries formalized in this Agreement.

NOW, THEREFORE, IT IS MUTUALLY AGREED BETWEEN THE PARTIES as follows:

1. Term

This Agreement shall not become effective until signed by both authorized signatories of the Authority and the County HA. The term of this Agreement shall be from the date indicated above (the "Effective Date") to April 30, 2018 unless terminated earlier pursuant to paragraph five (5) (Termination) below. The parties may extend the term of this Agreement for five (5) years upon mutual written agreement of the parties.

2. Jurisdictional Boundaries

A. The parties mutually agree that for purposes of performing the obligations under this Agreement and throughout the term of this Agreement, there shall be defined boundaries designating areas known as: (i) the City-Authority Boundary and (ii) the County-HA Boundary. The Boundaries shall be designated as indicated in Exhibit A and B, attached hereto and incorporated by reference. City-Authority Boundary shall include all areas within jurisdiction as of January 1, 2013 (Exhibit A) and County-HA Boundary shall include all areas within its jurisdiction as of January 1, 2010 (Exhibit B). This Agreement shall not extend to any other jurisdictional areas for which either entity has jurisdictional control.

3. Portability

A. The Authority and the County HA agree that portability or "porting" refers to an administrative function created by HUD for the Housing Choice Voucher Program which occurs when a voucher client moves his/her residence from one housing authority's jurisdiction to another housing authority's jurisdiction and the porting housing authority transfers administration of that client's voucher to the receiving housing authority. The Authority and the County HA further agree that HUD requires the porting housing authority to pay a monthly administrative fee to the receiving housing authority and to reimburse the receiving housing authority for the monthly rental subsidy paid to the voucher client's landlord on the porting housing authority's behalf.

B. The parties agree that by this Agreement the parties are establishing a maximum number of voucher clients that can be retained by the Authority and by the County HA for clients residing in the other's jurisdiction without porting.

4. Maximum Number of Voucher Clients Retained Without Porting

A. The Authority may retain up to one hundred-twenty (120) voucher clients residing within the County-HA Boundary without porting. The Authority agrees to port client vouchers for clients that reside within the County-HA Boundary that exceed the one hundred-twenty (120) voucher limit.

B. The County HA may retain up to one hundred-twenty (120) voucher clients residing within the City-Authority Boundary without porting. The County HA agrees to port client vouchers for County HA clients that reside within the City-Authority Boundary that exceed the one hundred-twenty (120) voucher limit..

C. The County HA administers a HUD housing voucher program known as the Veterans Administration Supportive Housing (hereinafter "VASH"). Any current VASH vouchers allocated to the County HA by HUD shall be included in the one hundred-twenty (120) voucher limit described in subparagraph B above. Each VASH voucher newly allocated to the County HA by HUD after the effective date of this Agreement used by voucher clients to lease rental units in the City-Authority boundary and administered by the County HA, will not be subject to any porting requirements as provided in this Agreement.

D. Any state funded vouchers allocated to the Authority that are used to lease rental units in the County-HA Boundary will be administered by the Authority and will not be included in the voucher limit described in subparagraph A above. All state funded housing vouchers allocated to the County HA that are used to lease rental units in the City-Authority Boundary will be administered by the County HA and will not be included in the voucher limit described in subparagraphs B and C above and subparagraph E below.

E. The parties agree that both parties will pursue their goal of developing and increasing the availability of affordable housing within their respective jurisdictional boundaries. The 120 voucher clients referred to in subparagraphs A and B, above may be increased at the ratios indicated below if the County HA files a Land Use Resolution Agreement and increases affordable housing units within the County-HA Boundary or the City-Authority Boundary.

- For every one (1) unit of affordable housing that targets low-income families that earn thirty percent (30%) or less of the Area Median Income, the County HA voucher limit will increase by two (2) additional vouchers (2:1)
- For every one (1) unit of affordable housing that targets low-income families that earn more than thirty percent (30%) and less than sixty percent (60%) of the Area Median Income, the County HA voucher limit will increase by one (1) additional voucher (1:1)

F. The Authority shall provide to the County HA a list of the resident addresses for voucher clients subject to the voucher limit within fifteen (15) days after the end of each calendar quarter. The County HA shall use the information provided by the Authority to complete a report to be distributed to the Authority and County HA within thirty (30) days after the end of each calendar quarter. The report will list the current voucher limits for the Authority and the County HA and the voucher client addresses subject to those voucher limits.

G. The County HA and Authority will jointly adopt metro and rural payment standards and utility allowances and will use the standards and utility allowances as described below.

- The metro payment standard and utility allowance shall be used by the Authority and the County HA when

assisting voucher clients residing within the City-Authority Boundary.

- The rural payment standard and utility allowance shall be used by the Authority and the County HA when assisting voucher clients residing within the County-HA Boundary.

5. Termination of Agreement for Cause

Either party may terminate the Agreement based upon any material breach of this Agreement by the other party. The non-breaching party shall give the breaching party written notice of termination specifying the grounds for the termination. The termination shall be effective thirty (30) days from the breaching party's receipt of the notice of termination, during which time the breaching party shall have the right to cure the breach. If, however, the breach cannot with due diligence be cured within thirty (30) days, the breaching party shall have a reasonable time to cure the breach, provided that, within thirty (30) days of its receipt of the written notice of termination, the breaching party began to cure the breach and advised the non-breaching party in writing that it intended to cure.

6. Dispute Resolution

The Authority and the County HA agree to resolve disputes first by informal discussion. If informal discussion is unsuccessful in resolving a dispute, either party may request mediation by a mediator mutually agreed upon by the parties. The parties shall share the cost of mediation equally. The request for mediation shall be submitted in writing to the other party. Both parties shall participate in the mediation process in good faith. The process shall be completed within sixty (60) days of filing of a request for mediation.

7. Liability

Neither party shall be responsible for liability incurred as a result of the other party's acts or omissions in connection with this Agreement. Any liability incurred in connection with this Agreement is subject to the immunities and limitations of the New Mexico Tort Claims Act, § 41-4-1, et seq., NMSA 1978, as amended.

8. Amendment

This Agreement shall not be altered, changed or amended except by an instrument in writing executed by the parties hereto.

9. Appropriations

The terms of this Agreement are contingent upon sufficient appropriations and authorization being made by the governing bodies of the Authority and the County HA for the performance of this Agreement. If sufficient appropriations and authorization are not made this Agreement shall terminate upon written notice being given from one party to the other.

10. Governing Law

Both parties shall abide by all applicable federal and state laws and regulations. This Agreement shall be governed by and construed in accordance with the laws of New Mexico.

11. Merger

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the service to be performed hereunder, and all such agreements, covenants and understandings have been merged into this Agreement. This Agreement expresses the entire Agreement and understanding between the parties with respect to the rental of low income housing to citizens residing in the City of Santa Fe and Santa Fe County; namely the Housing Choice Voucher Program. No prior agreement or understanding, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

IN WITNESS WHEREOF the parties have duly executed this Agreement as of the dates written below.

SANTA FE COUNTY HOUSING AUTHORITY:

Kathleen S. Holian, Chair

Date

James R. Pacheco, Executive Director

Date

CITY OF SANTA FE CIVIC HOUSING AUTHORITY

Ed Romero, Executive Director

Date

Family Self-Sufficiency Program

The Family Self-Sufficiency Program (FSS) was started in 1992 for the benefit of Housing Choice Voucher (formerly Section 8) tenants. The objective of the program is to help participants become economically self-sufficient with a variety of support systems designed for this purpose. Monthly trainings on various topics, consistent support of goals outlined by the tenant and the ability to acquire a substantial savings account to help achieve those goals are the main features of the FSS program. This program is a voluntary five year program designed with each individual participant's particular needs and goals being addressed in an effort to be successful in achieving economic independence. Based on the success of the program for housing choice voucher tenants, the FSS Program for public housing families started in 2002.

The main objective of the FSS Program is to establish an individual escrow (savings) account for each participating member. This savings account is subsidized by a match of funding provided by federal sources to encourage a pattern of saving. When there is an increase in earned income by the participant the increase is also credited to the escrow account. The funds accumulated in the escrow account by the program participant and partner agency will be dispersed upon completion of the program at the end of the five year period. In many cases this program is the basis for future financial independence.

At this time thirty-two (32) families have completed the program since its inception at the county housing authority. Of the families that have participated in the program twenty-three (23) have successfully achieved homeownership as a result of participation in the program. Most of these FSS families are participants in the Housing Choice Voucher Program and many moved from public housing to housing choice vouchers and then into home ownership.

Currently one family in the Public Housing FSS Program who has completed the program will be a homeowner this July when her new house is ready to move into. It would appear that this number is low; however five other families who have completed the Section 8 FSS Program began with Public Housing FSS Program. Two of these families became homeowners with that program.

Besides home ownership there are other success stories associated with the public housing FSS Program. There are presently ten families in the Public Housing FSS program. One participant has earned her GED, while three others are working toward earning their GED's. One participant graduated last year from Carrington College's Medical Assistant Program, while another will be graduating from the Santa Fe Community College this month with an Associate's Degree in Business. There is a participant who's working toward her degree in Elementary Education, all while she raises her three children, her two grandchildren, and four nieces and nephews.

The Public Housing Program may be small, but it does help those families that are ambitious and have goals to work towards and strive to make better lives for themselves and their families.

Memorandum

To: Santa Fe County Housing Authority Board
From: Victor Gonzales, Project Manager
Via: James R. Pacheco, Executive Director
Date: 5/14/13
Re: CFP Report

Extension of the Main Sewer Line at the Jacob D. Martinez Site

Staff met with the engineer and the surveyor on May 8, 2013. In order to get the correct elevations for the engineer, Pump Masters pumped out the sewage from the sewer line. We will meet with the engineer and architect on May 16, 2013, to decide how to proceed.

Sewer Lines in Santa Cruz

On May 14, 2013, a purchase order will be issued to Sub Surface to commence replacing the sewer yard lines in the Santa Cruz Site. Replacement of the sewer yard lines will minimize the amount of time maintenance staff spends on dealing with sewer line issues. The total cost of the sewer line replacement is \$113,876.86.

Re-Roofing of Units at Valle Vista Site

The re-roofing of 13A Las Lomas and 13B Las Lomas and 14A Val Verde and 14B Val Verde is complete. The total cost of the project was \$12,795.00.

Abatement and Renovation of a Unit at the Santa Cruz Site

Abatement of 154 Camino de Quintana will begin on May 14, 2013. Abatement should be completed by May 17, 2013. The total cost of abatement is \$7,446.87.

Renovation will follow after abatement. Staff is working on acquiring quotes for the renovation part of this project.

Asbestos Abated Units

Please see the attached report.

SANTA FE COUNTY HOUSING AUTHORITY
Asbestos Abatement Report
as of May 13, 2013

	Abated Units		Unabated Units		Total Units	
	Homeowner	Public Housing	Homeowner	Public Housing	Homeowner	Public Housing
<u>Valle Vista Site</u>						
Completely abated	25	3	0	0	25	3
Bathroom only	0	6	0	0	0	6
Unabated	0	0	1	63	1	63
Total	<u>25</u>	<u>9</u>	<u>1</u>	<u>63</u>	<u>26</u>	<u>72</u>
<u>Santa Cruz</u>						
Completely abated	1	10	0	0	1	10
Bathroom only	0	12	0	0	0	12
Unabated	0	0	0	37	0	37
Total	<u>1</u>	<u>22</u>	<u>0</u>	<u>37</u>	<u>1</u>	<u>59</u>
<u>Camino de Jacobo</u>						
No units contain asbestos	n/a	n/a	n/a	n/a	n/a	n/a

**Housing Programs
Actual vs Budget
April 2013**

HCV & VASH Fiscal YTD				Better/ (Worse)
	Actual	Budget		
Revenue				
Repayment agreement	6,807	13,333		(6,526)
Investment income	650	0		650
Port-in vouchers	39,771	236,667		(196,896)
Port-in admin fees	2,981	16,667		(13,686)
Housing assist. pmt	1,353,331	1,801,250		(447,919)
FSS coordinator gmt	46,000	28,750		17,250
Admin fees	172,626	61,667		110,959
Total revenue	1,622,166	2,158,333		(536,167)
Expenditure				
Salaries & benefits	205,705	221,240		15,535
Travel	0	5,000		5,000
Vehicle expense	2,015	2,364		350
Maintenance	0	0		0
Audit contract	7,000	5,833		(1,167)
Software	2,000	2,500		500
Vouchers paid	1,840,687	2,109,344		268,656
Admin fee port-out	21,036	18,600		(2,436)
Supplies	932	1,417		484
Utilities	3,434	8,798		5,364
Seminars, dues, pstge	2,692	3,628		937
Total expense	2,085,500	2,378,724		293,224
Net	(463,334)	(220,391)		(242,943)
UML	2,755	2,760		5

Home Sales Fund Fiscal YTD			
	Original Amount	Used thru 4/30/13	Balance Remaining
Site Improvements	1,000,000	646,708	353,292
Foreclosure Prvntn	1,000,000	557,013	442,987

LRPH Fiscal YTD				Better/ (Worse)
	Actual	Budget		
Revenue				
Rent, repayments, etc.	341,381	291,667		49,715
Investment income	1,261	0		1,261
FSS coordinator gmt	46,105	47,156		(1,051)
Operating subsidy	279,280	313,511		(34,231)
Total revenue	668,027	652,333		15,694
Expenditure				
Salaries & benefits	469,631	558,520		88,889
Travel	49	2,167		2,118
Vehicle expense	17,475	28,518		11,043
Maintenance	37,640	139,046		101,405
Audit contract	14,000	11,667		(2,333)
Software	4,144	4,550		406
Other control svc	0	583		583
Supplies	2,120	4,701		2,581
Utilities	104,192	126,444		22,252
Utility reimbursmnts	14,313	17,158		2,845
Seminars, dues, pstge	4,961	9,001		4,040
Insurance	24,307	21,426		(2,881)
Total ops expense	692,831	923,779		230,949
Net before captl & RP	(24,803)	(271,446)		246,643
UML	1,905	1,990		(85)
Capital expense	5,069	8,004		2,935
Stipends	2,300	3,083		783
RP supplies	(5)	917		922
RP capital expense	0	0		0
Total expense	700,194	935,783		235,589
Net after capital & RP	(32,167)	(283,450)		251,283

CFP Fiscal YTD			
	Grants @ 7/1/12	4/30/13 YTD	Grants @ 4/30/13
Revenue			
HUD subsidies	289,709	282,498	572,207
Expenditure			
1406 Operations	38,508	14,228	52,736
1408 Mgmt imprvmts	6,370	2,570	8,940
1410 Administration	31,049	22,433	53,482
1730 Fees & costs	10,192	0	10,192
1450 Site imprvmts	7,465	0	7,465
1460 Dwelling strctrs	198,937	210,127	409,064
1465 Dwelling equip.	19,806	10,796	30,602
1475 Non-dwllg equip	0	3,500	3,500
Total expense	312,327	263,654	575,980
Net	(22,618)	18,845	(3,773)

Linkages & Bridge Fiscal YTD			
	Actual	Budget	Better/ (Worse)
Linkages:			
Revenue	83,818	108,333	(24,515)
Expense	80,617	108,333	27,716
Net	3,201	0	3,201
Linkages UML	90	100	(10)
Bridge:			
Grant remng at 7/1/12	77,624	77,624	0
Expense	14,899	45,833	30,935
Grant remng at 4/30/13	62,725	31,790	30,935
UML	23	40	17

SANTA FE COUNTY HOUSING AUTHORITY

VACANCY REPORT

April 2013 – September 2013

	April	May	June	July	August	September
Total Units Available for Lease	199	199				
Units Off-line Due to Modernization	1	1				
Vacant Units (ready for occupancy)	1	0				
Total Vacant Units (preparing for occupancy)	6	4				
Vacant Units per Site						
<u>Valle Vista</u>	1	2				
<u>Santa Cruz</u>	4	3				
<u>Camino de Jacobo</u>	2	0				
Total Units Under Lease	192	194				
	4%	3%				

SANTA FE COUNTY HOUSING AUTHORITY
 VACANCY ANALYSIS UNIT TURNAROUND
 Valle Vista/50-1/50-2
 FY 2012-2013
 May 20, 2013

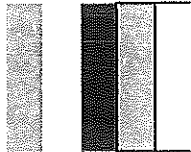
Units / Modernization	
Units / Make Ready	
Units Ready for Lease Up	
Scheduled Lease-up	
Units Leased FY 2012-2013	

Address	Bdrm Size	Move Out Date	Date to Maint	Date Unit Completed	Make Ready Date	Lease- Up Date	# of Days Lease- Up	Make Ready	# of Days Vacant	Tenant	Comment	Tenant	Comment
I3A LL	2	7/9/12	7/9/12	9/4/12	9/4/12	9/5/12	1	57	58	A. Sena	Moved out	N. Martinez	
I3B T	2	7/12/12	7/13/12	9/18/12	9/18/12	9/20/12	2	68	70	Gomez	Evicted	J. Duran	
10 LL	4	7/14/12	7/14/12	2/25/13	2/25/13	3/1/13	4	226	230	L Grajeda C.	abandoned	Ramona Flores	Need days unit was down for spraying
4 LL	3	8/9/12	8/9/12	10/24/12	10/24/12	10/24/12	0	76	76	Sandoval	MO	Gamboa	
11 SMW	4	7/23/12	7/23/12	12/6/12	12/6/12	12/13/12	7	136	143	N. Quintana	transfer to CDJ	G. Ponce	Need days unit down for mold removal
10AVV	2	9/4/12	9/4/14	9/6/12	9/6/12	9/6/12	0	2	2	V Maes	S8	K. Saiz	
18 SPN	4	9/10/12	9/10/12	12/6/12	12/6/12	12/11/12	5	87	92	A. Alvarado B.	evicted	B. Crowder	
9 SMW	3	4/3/12	4/3/12	10/23/12	10/23/12	10/23/12	0	203	203	Chavarria	Transfer	P. Otero	
9A Tusa	1	10/1/12	10/1/12	12/27/12	12/27/12	1/1/13	15	87	102	Mendoza	Moved out	E. C de Baca	

SANTA FE COUNTY HOUSING AUTHORITY
VACANCY ANALYSIS TURNAROUND
Valle Vista/50-1/50-2
FY 2012-2013
May 20, 2013

Address	Bdrm Size	Move Out Date	Date to Maint	Date Unit Completed	Make Ready Date	Lease- Up Date	# of Days Lease- Up	Make Ready	# of Days Vacant	Tenant	Comment	Tentative Tenant	Comment
20A SPN	2	11/2/12	11/2/12	1/18/13	1/18/13	1/18/13	0	77	77	P. Otero	transfer to 9SMW	Officer Ames	
20B SPN	2	10/3/12	10/3/12	1/18/13	1/18/13	1/18/13	0	107	107	C. Martinez	evicted	E. Romero	
3ALL	1	10/31/12	11/31/13	2/20/13	2/28/13	2/28/13	0	112	112	R.Hall	deceased	Snow	
16 T	3	1/29/13	1/29/13	2/15/13	2/26/13	2/26/13	0	17	17	H. Perea	Moved out	C. Ortiz	
7BT	2	11/22/12	11/22/12	1/18/13	1/18/13	1/28/13	10	57	67	Navarez	Moved out	K. Miera	
15A Tusa	1	1/25/13	1/25/13	1/30/13	1/31/13	1/31/13	0	5	5	A. Ames	transfer	T. Solano	
7B SPN	2	1/8/13	1/8/13	2/1/13	2/1/13	2/1/13	0	24	24	V Pena	Section 8	B. Barba	
12 B VV	1	3/8/13	3/8/13	3/18/13	3/18/13	3/18/13	0	10	10	J. Ludi	evicted	F. Ortiz	
9BT	1	4/17/13	4/17/13				0		0	J. Ortiz	abandoned		5/24/2013
5 A Tusa	1	3/12/13	3/12/13	4/12/13	4/12/13	4/23/13	11	31	42	R. Piefer	abandoned	C Jaramillo	
6 SPN	3	4/26/13	4/26/13				0		0	F Ortiz	transfer	Transfer S Vigil	

Santa Fe County Housing Authority
 Vacancy and Unit Turnaround
 Santa Cruz
 FY2012-2013
 May 20, 2013



Units / Modernization
 Units / Make Ready
 Units Ready for Lease Up
 Scheduled Lease-up
 Units Leased FY 2012-2013

Address	Bdrm Size	Move Out Date	Date to Maint	Date Unit Completed	Make Ready Date	Lease-Up Date	# of Days Lease-Up	Make Ready	# of Days Vacant	Tenant	Comment	Tentative Tenant	Comments
124 Q	4	6/30/12	6/30/12	8/23/12	8/23/12	8/31/12	8	54	62	D. Lazoya	moved out	P Perkins	
138 Q	3	8/9/12	8/13/12	10/31/12	10/31/12	10/31/12	0	83	83	F. Harris	Moved to Civic	M Zimmerman	
133 Q	3	6/6/12	6/6/12	8/15/12	8/15/12	8/16/12	1	70	71	L. Jacquez	Moved Out	M. Casillas	
110 DR	2	8/28/12	8/29/12	11/13/12	11/13/12	11/15/12	2	77	79	K. Williams	abandoned	A. Gabadon	
112 DR	2	9/19/12	9/20/12	1/25/13	1/25/13	1/29/13	4	128	132	C. Valdez	moved out	A. Atencio	
147 Q	2	10/23/12	10/24/12	1/31/13	2/19/13	2/19/13	19	100	119	F. Martinez	moved out	S. Maes	
140 Q	3	11/1/12	11/2/12	1/29/13	1/29/13	1/29/13	0	89	89	A. Espinoza	moved out	C. Talavera	
143 Q	2	8/31/12	9/20/12	1/31/13	1/31/13	2/19/13	19	153	172	E. Cruz	moved out	J. Brown	
141 Q	2	1/2/13	1/3/13	1/25/13	1/25/13	1/29/13	4	23	27	G. Martinez	moved out	J. Lawson	
124 Q	4	2/5/13	2/6/13	2/20/13	2/20/13	2/26/13	6	15	21	P. Perkins	moved out	Y. Serna	
107 DR	2	3/12/13	3/12/13	4/11/13	4/11/13	4/16/13	5	30	35	A. Valenzuel	moved out	Islas	
142 Q	3	3/8/13	3/8/13	4/1/13	4/9/13	4/9/13	8	24	32	E. Ramirez	abandoned	Sisneros	
154 Q	5	3/8/13	3/11/13				0		0	A. Marquez	moved out		
132 Q	3	4/1/13	4/2/13	5/2/13	5/2/13	5/6/13	4	31	35	Y. Montoya	moved out	E. Varela	
165 Q	3	4/1/13	4/2/13	5/2/13	5/2/13	5/6/13	4	31	35	Y. Montoya	moved out	E. Varela	

Santa Fe County Housing Authority
Vacancy and Unit Turnaround

Santa Cruz
FY2012-2013
May 20, 2013

Address	Bdrm Size	Move Out Date	Date to Maint	Date Unit Completed	Make Ready Date	Lease- Up Date	# of Days Lease- Up	Make Ready	# of Days Vacant	Tenant	Comment	Tenative Tenant	Comments
113 DR	2	5/5/13	5/6/13				0		0	J Armijo	moved out	Herrera	
162 Q	3	4/1/13	4/2/13	4/18/13	4/18/13	4/30/13	12	17	29	A. Mirels	lease term	A. Fernandez	

SANTA FE COUNTY HOUSING AUTHORITY
 VACANCY AND UNIT TURNAROUND
 Camino de Jacobo/50-1/50-2
 FY 2012-2013
 May 20, 2013

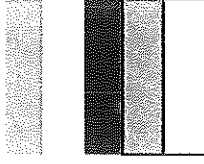
Units / Modernization

Units / Make Ready

Units Ready for Lease Up

Scheduled Lease-up

Units Leased FY 2012-2013



Address	Bdrm Size	Move Out Date	Date to Maint	Date Unit Completed	Make Ready Date	Lease-Up Date	# of Days Lease- Up	Make Ready	# of Days Vacant	Tenant	Comment	Tenative Tenant	Comment
59 CDJ	2	5/1/12	5/1/12	7/9/12	7/9/12	7/10/12	1	69	70	S. Valdez		A. Najera	moved out
19 CDJ	2	5/19/12	5/19/12	7/20/12	7/20/12	7/20/12	0	62	62	M. Perez		M. Tapia	Transfer
18 CDJ	3	6/2/12	6/2/12	7/20/12	7/20/12	7/20/12	0	48	48	J. Tongate		N. Quintana	Transfer
68 CDJ	2	5/26/12	5/26/12	8/27/12	8/31/12	8/31/12	4	97	101	E. Tapia		Santistevan	moved out
25 CDJ	1	7/20/12	8/24/12	10/15/12	10/15/12	10/19/12	4	87	91	R. Martinez		T. Clokey	deseased
69 CDJ	2	8/21/12	8/21/12	11/14/12	11/14/12	11/16/12	2	85	87	M Serrano		E. Sanchez	moved out
22 CDJ	2	10/3/12	10/3/12	12/17/12	12/17/12	12/21/12	4	75	79	M. Crespín		G. Armijo	evicted
17 CDJ	3	5/4/12	5/4/12	8/2/12	8/2/12	8/3/12	1	90	91	A. Montoya		Altamirano	evicted
13 CDJ	3	8/1/12	8/1/12	10/3/12	10/3/12	10/3/12	0	63	63	M. Tapia		R. Crawford	transfer
64 CDJ	2	1/7/13	1/7/13	1/29/13	1/29/13	1/29/13	0	22	22	G Bernal		J. Montoya	evicted

SANTA FE COUNTY HOUSING AUTHORITY
 VACANCY AND UNIT TURNAROUND
 Camino de Jacobo/50-1/50-2
 FY 2012-2013
 May 20, 2013

Address	Bdrm Size	Move Out Date	Date to Maint	Date Unit Completed	Make Ready Date	Lease-Up Date	# of Days Lease- Up	Make Ready	# of Days Vacant	Tenant	Comment	Tentative Tenant	Comment
37 CDJ	1	3/22/13	3/22/13	4/25/13	4/25/13	5/8/13	13	34	47	M. Romero	evicted	Pamela Smith	
18 CDJ	3	4/1/13	4/1/13	4/16/13	4/16/13	4/25/13	9	15	24	N. Quintana	evicted	C.Hernandez	
15 CDJ	2	5/1/13	5/1/13	5/9/13	5/9/13	5/9/2013	0	8	8	EJ Alderete	moved out	J Urban	

Memorandum

To: Santa Fe County Housing Authority Board
From: Ron Pacheco, Housing Executive Director
Date: 5/17/2013
Re: Director's Report

Admissions and Continued Occupancy Policy Manual Review and Update

County Housing Staff are currently working to update the Admissions and Continued Occupancy Policy Manual (ACOP). This publication is the definitive document for administering the county public housing program on a daily basis. The process of staff review is detailed and comprehensive with several individuals reviewing the document and then collectively sitting down to compare prospective changes and confirm the rational for those changes. In many cases the update allows the county housing authority to stay current with federal HUD directives. When the review process of all seventeen (17) chapters is complete the updated document will be presented to Housing Authority Board for approval. The last comprehensive review and update was completed in 2006 making the current exercise important for the housing authority and the families we serve.

Preparation is Underway for Annual REAC Inspections of Public Housing Properties

The Real Estate Assessment Center (REAC), a subcontractor of HUD (Housing and Urban Development), will be conducting annual inspections of county public housing properties in July. A certified REAC inspector will be present and visit all three public housing properties to determine how well the program is complying with standards that govern both the interior and exterior condition of public housing properties. The inspection process includes a report that provides the housing authority with a score that lists any deficiency related to the condition of all common grounds, buildings and rental units. Staff is currently undergoing a review process to assist in preparing for the upcoming inspection. In the next several weeks we will be working at all three public housing sites to prepare for the inspection. This process includes informing tenants of the upcoming inspection in order to assist them in preparing their homes for a possible visit from the REAC inspector.

Update on the Humane Removal of Prairie Dogs at the Jacob D. Martinez Housing Site

In April the successful humane removal of prairie dogs from the Jacob D. Martinez public housing site was completed by Eco-Solutions. Over a several week period prairie dogs were captured, quarantined (as required) and then re-located in family units to a protected environment as required by local ordinance. Prior to the breeding season fifty (50) furry little creatures were captured and re-located at a cost of four thousand two-hundred dollars (\$4,200). This being the second time this process has occurred in recent years staff is satisfied with the results as we have seen no trace of prairie dogs living on site. We will continue to monitor the situation as the summer progresses.

*****COUNTY NEWS*****

***NEW! VICTOR GONZALEZ – NM NAHRO MAINTENANCE
EMPLOYEE OF THE YEAR!***

At the annual meeting of the New Mexico Chapter of National Association of Housing and Redevelopment Officials (NAHRO), Santa Fe County Housing Authority Capital Fund Program Coordinator Victor Gonzalez, was selected as the maintenance Employee of the Year. The award recognized Victor for his dedication, commitment and outstanding service to the families living in public housing. For the past 17 years, Victor has been an important part of the housing team and has been dedicated to providing safe and decent housing to families living and participating in Santa Fe County housing programs. In addition to helping with the maintenance of public housing homes, Victor is responsible for managing the Capital Fund Program for public housing. Congratulations to Victor!

February 23, 2013

James R. Pacheco, Executive Director
Santa Fe County Public Housing Authority
#52 Camino de Jacobo, 87507
jrpacheco@santafecountynm.gov

Dear Mr. Pacheco:

I am writing in response to the open position on the Santa Fe County Housing Board. I am excited to apply for this opportunity given my long commitment to affordable housing and advocacy on behalf of low-income residents.

Before receiving my Masters in City and Regional Planning from Cornell University this past May, I spent my previous years advocating on behalf of low-income residents facing housing and homelessness crises in the surrounding counties of western New York.

In my advocacy for clients at Legal Assistance of Western New York, I managed large-scale projects and grants, worked closely with departments of social services, housing authorities, human services providers, community action groups, regional coalitions, state departments of labor, utility companies, landlords and county planners. In advocating for tenants, and negotiating with diverse (and often conflicting) groups, this work helped to reinforce my skills as a communicator and my ability to work with diverse populations.

In addition to direct advocacy, I worked with housing coalitions (Seneca County Housing Coalition, Finger Lakes Housing Consortium, Partners for Children, Youth and Families, and Cayuga County Homelessness Task Force), organizing strategies to improve access to quality affordable housing, and bringing a variety of stakeholders into the planning and management of community initiatives.

During my work for Ithaca Neighborhood Housing Services, I developed a Resident Services Referral Program for the rental properties at INHS. This represented a definitive shift in the provision of services to their low-income residents, and was built out of my work with the residents through ongoing focus groups, meetings, and needs assessment surveys.

Now back in Santa Fe, in my role as Social Justice Director for Temple Beth Shalom, I have participated in the Mayor's Homelessness Task Force and have worked with Envision Santa Fe, helping families transition out of homelessness into more stable housing.

I believe my experience in the field of affordable housing – both as a mediator between residents and housing agencies, and in critically reviewing housing policy, has prepared me well for a position on the Housing Authority Board.

Please feel free to contact me with any questions as you proceed with your search.

Many thanks in advance for your consideration,

Rebecca Baran-Rees

REBECCA BARAN-REES

EDUCATION

Cornell University

2010 - 2012

Master of City & Regional Planning 2012

Community and economic development, affordable housing

UC Berkeley

2002 - 200

Political Science, cum laude

Comparative political economy and international development

RELEVANT WORK EXPERIENCE

Temple Beth Shalom

2012 - present

Santa Fe, NM

Social Justice Director

- Coordinating and implementing social justice programming in TBS and the greater Santa Fe community, community education and outreach, legislative advocacy, participation in the Mayor's Homelessness Task Force.
- Envision Santa Fe Coordinator, assisting families transition out of homelessness (a project of the Interfaith Leadership Alliance).

Ithaca Neighborhood Housing Services

2011

Ithaca, NY

Resident Services Coordinator

- Initiating community and non-profit partnerships with human services agencies for supporting a referral service for Ithaca Neighborhood Housing residents. Conducting interviews, focus groups, and larger group meetings with residents regarding housing and community concerns. Working with INHS staff to implement referral program, in addition to starting a housing services coalition group of providers in Tompkins County.

Legal Assistance of Western New York, Inc.

2008 - 2010

Geneva, NY

Project Coordinator, Paralegal

- Grant-making and managing over 30 grants to support the provision of free legal services to low-income people in five counties in upstate NY, including projects to enforce child support orders, prevent homelessness and foreclosures, and draft plain language legal resources for low literacy populations.
- Coordinating AmeriCorps Paralegal Access to Justice Program, assisting in training new members on intake and other offices procedures.
- Direct legal advocacy to clients, including representation at informal hearings with local housing agencies (Section 8, USDA, HUD) and Departments of Social Services, and negotiating settlements with landlords and utility companies.
- Ongoing case management to clients, serving over 650 individuals and families in 2008-09, monitoring legal assistance to ensure safe and stable housing.
- Organization-wide priority setting and strategic planning for LawNY regional offices, participation in Seneca County Housing Coalition and the Cayuga County Homelessness Forum, organizing and executing a needs assessment survey across five counties, surveying low-income people and human services providers.



2012 SANTA FE COUNTY
CONFLICT OF INTEREST
AND
FINANCIAL DISCLOSURE STATEMENT

Baran-Rees

Rebecca

E

Last Name

First Name

Middle Initial

Work Address

Work Phone Number

Home Address

Home Phone Number

Social Justice Director

Job Title

Department/Division/Office

Filing Status:

☐ Candidate for Office ☐ Incumbent Elected Official ☐ County Employee ☐ Appointed Official ☒ Volunteer

Dylan Weller

None

Name of Spouse

Spouse's Employer

1. Real Estate

List all real property that you own in Santa Fe County and provide the address (es) or, if there is no address or if the address provides insufficient information to describe a large piece of property, a general description of the location of the property. List all real property in Santa Fe County in which you have any interest whatsoever, including outright ownership, an option to purchase, leasehold, or other interest.

2. Interest in a Business

List any interest that you have in a business organization, either as owner, part owner, partner (general or limited), or shareholder, in which you own more than two percent of the outstanding stock or more than two percent ownership interest, or in which you serve as general or managing partner, if that business does business with the County in an amount in excess of \$7,500.00 annually.

None

3. Gifts

Identify each person from which you received either directly or indirectly, any gift or gifts having an aggregate value of more than \$250.00 within the taxable year proceeding the time of filing. This does not include any gift from a parent, grandparent, child, grandchild, brother, sister, parent-in-law, grandparent-in-law, brother-in-law, sister-in-law, uncle, aunt, niece, nephew, spouse, boyfriend, girlfriend, domestic partner, fiancé, or fiancée.

None

4. Financial Interests

List any financial interest that is: (i) an ownership interest or other interest in any contract or prospective contract with the County; (ii) an interest in the sale of real or personal property to or from the County; (iii) a financial relationship with a person or business whose interests may be affected by the County; (iv) any employment or prospective employment for which negotiations have already begun where the prospective employer has an interest in the sale of real or personal property to or from the County; or (v) any other interest that may be affected by the County.

None

5. Memberships on Boards of For-Profit or Non-Profit Businesses

List any boards of, for-profit or non-profit organizations that you or your spouse serve on.

None

6. Professional Licenses in New Mexico

If you or your spouse hold any professional licenses in New Mexico to engage in a profession, such as medicine, law, cosmetology, construction, etc., please list below. Driver's licenses do not apply.

Type of License

Licensee

None

7. Additional Information

Include below any pertinent financial interests or information that the preceding categories have not revealed.

None

Rebecca Baran
Signature

2/26/13
Date

State of New Mexico)

) SS.

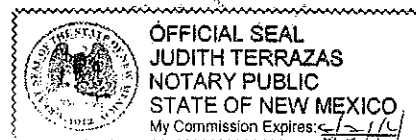
COUNTY OF SANTA FE)

The foregoing instrument was acknowledged before me this 26th day of February, 2013

by Rebecca Baran Rees

[Signature]
Notary Public

My Commission Expires: 05/02/14



**QUESTIONS FOR APPLICANTS SEEKING APPOINTMENT TO A BOARD,
COMMITTEE OR TASK FORCE**

Applicant Name Rebecca Baran-Rees

Committee Santa Fe County Housing Authority Board

1. Do you have any contracts, leases or other work with County government? If you are employed, does your employer have any contracts, leases or other work with County government? If yes, please explain.

None

2. Have you appeared in front of the Board of County Commissioners, County Development Review Committee, or any other committee, board or task force of the County? If so, state the subject matter at issue, the approximate dates, the action (if any) that was taken, the capacity in which you served, and any other relevant information.

No.

3. Do you lobby County government? If yes, please explain.

No.

4. Are you related to any County employees or elected officials? If yes, who are you related to and how are you related?

No.

5. Will you consent to a background investigation of your fitness to serve?

Yes.

6. Do you have any applications pending before the County or do you have plans to submit any applications to the County? If so please identify in detail the applications or potential applications.

No.

Inquiry Authorization Release

In connection with my application to sit on a Santa Fe County Board or Committee, I understand and agree that background inquiries may be requested by Santa Fe County. Furthermore, I understand and agree that Santa Fe County may request information from various Federal, State, and other agencies, including private and public sources which maintain records concerning my past activities to include information about any criminal activity.

The following information is my complete and legal name and all information is true and correct to the best of my knowledge.

Last Name: Baran-Rees

First Name: Rebecca

Middle Name: Elizabeth

Aliases: none

Date of Birth: [REDACTED]

Place of Birth: [REDACTED]

Social Security Number: _____ Leave This Blank,
Human Resources or I will Call You and Request the number when paperwork is completed

Residence Address: [REDACTED]

[REDACTED]

Drivers License Number and State: [REDACTED]

[Signature]
Applicants Signature

James R. Pacheco

From: [REDACTED]
Sent: Sunday, February 10, 2013 10:10 PM
To: James R. Pacheco
Subject: Housing Authority Board Vacancy
Attachments: LOEWY, Joseph Resume 2013.doc

Mr. Pacheco:

My name is Joe Loewy. I recently moved to Santa Fe from Connecticut where I had been the Executive Director of the Housing Authority of the Town of Simsbury. I am attaching my resume for consideration for the Community Member position on the Housing Authority Board.

During my 10+ years in public housing I was not only an Executive Director, but had the privilege of serving my community as a member of the Aging and Disabilities Commission. Further, I served on the Executive Board of the Connecticut State division of NAHRO (CONN-NAHRO) and was the secretary of the organization for the past 4 years. I was Chairman of the CONN-NAHRO Small PHA Committee representing approximately 50 Housing Authorities ranging in size from 24 to 250 housing units.

If you feel that my housing, finance and operations background is worthy of further consideration I would be most interested in discussing the vacant position with you and Board Chairman Stefanics. If it is at all possible I would like to request that we have an opportunity to meet at your convenience to share public housing experiences and the current issues facing the Authority and the Board.

Please feel free to use the contact information attached.

Sincerely yours,

Joe Loewy

Joseph L. Loewy

PROFILE

Highly successful experience in elderly and disabled independent and assisted living housing administration, retail inventory shortage control and accounting, and operational auditing in a multi-location environment. Results and detail-oriented with ability to motivate others in collaborative manner. Enjoys training/developing employees.

EXPERIENCE

HOUSING AUTHORITY OF THE TOWN OF SIMSBURY (CONNECTICUT)

2002 - 2012

Executive Director

- Administration of Elderly/Disabled Independent Housing - 70 units and Assisted Living Facility - 40 units.
- Responsible for all administrative, accounting, operational, financial, human resources and strategic planning functions.
- Liaison to Town Board of Selectmen and State Agencies (DECD and CHFA)
- Executive Board Member, Connecticut NAHRO
- Member of Town Aging/Disabilities Commission

HARRY W. WERNER, VMD

2000 - 2002

Practice Manager

Large animal veterinary practice. Responsible for all office activities and business expansion.

MACY'S DEPARTMENT STORES, Boston, MA

1983 - 1992

1997 - 1999

42 stores - \$1.5B+ volume

Inventory Shortage Control Manager, 1997 - 1999

Distribution Centers and Stores (Filene's/G. Fox)

- Directed company Inventory Shortage Control audit function responsible for limiting exposure to loss in 2 distribution centers and 18 stores.
- Created and managed daily field audits in distribution centers to test receiving accuracy, correctness of merchandise being returned to vendors and physical security of merchandise resulting in significant shortage reduction and improvement of location accuracy.
- Conducted and administered store audit reviews of selling floor and stockroom controls, particularly in target locations. Shortage equal/better than goal achieved in 17 of 18 locations.
- Managed company semi-annual physical inventories and subsequent reconciliation of books to physical with Merchant Division resulting in improved accuracy and shortage reductions.

Director, Inventory Shortage Control (G. Fox), 1983 - 1992

- Directed company Shortage Control programs, field audit, physical inventories, and reconciliations resulting in top quartile performance within May Department Stores.
- Managed Internal Audit, Policy and Procedures, and Advertising Compliance functions.

MELVILLE CORPORATION (CVS Corporation)

1992 - 1997

BOB'S STORES, INC., Meriden, CT, 1995 - 1997

36 Stores - \$425MM volume

Director, Inventory Control

- Co-managed company Shortage Control programs with Director of Loss Prevention.
- Hired to provide inventory control experience during period of planned expansion.
- Introduced Company Asset Protection Committee and established Target Shortage Location programs resulting in 30% shortage reduction; maintained 1% shortage during expansion years.
- Implemented outside inventory service (RGIS) physical inventory process resulting in budgetary savings and greater accuracy due to recording style/size/color information.
- Implemented and managed program (Size Management) to monitor footwear stock availability in all locations at style and size level of detail as well as operational efficiency of having correct style/size on selling floor for good customer service resulting in sales increases.
- Participated in growth and subsequent reduction of stores from 18 to 42 and then, 36 stores.

MARSHALLS, INC., Andover, MA, 1992 - 1995
485 Stores - \$2.8B volume

Inventory Controller

- Coordinated company's Inventory Shortage Control and Loss Prevention Department activities and actively participated in company Asset Protection Committee activities including field reviews of stores in multiple locations across the U.S.
- Coordinated cycle inventory process of conducting multi-store inventories monthly with minimal impact on sales. Personally participated in over 50 store inventories.
- Assisted Internal Audit Department in conducting operational analyses of distribution centers resulting in procedural improvements and expense reduction by standardizing "best practices".
- Managed company damage disposition program coordinating monthly return of unsalable merchandise to "jobbers" returning over \$1MM per year.

SOUTHWEST COLLECTION, SIMSBURY, CONNECTICUT

1992 - 2008

Owner

RETAIL NATIVE AMERICAN/SOUTHWEST U.S. JEWELRY, GIFTS AND HOME ACCESSORIES

JOSKE'S OF HOUSTON, Houston, TX

1978 - 1983

(Allied Department Stores)

10 Stores - \$150MM volume

Director, Accounting, 1982 - 1983

Inventory Shortage Controller, 1978 - 1982

ABRAHAM AND STRAUS, Brooklyn, NY

1974 - 1978

(Federated Department Stores)

COD Audit Manager

Branch and Headquarters Store Shortage Controller

PRUDENTIAL SECURITIES., New York, NY

1970 - 1974

Internal Auditor

Branch Auditor

KPMG, New York, NY

1969 - 1970

Staff Accountant - Specializing in brokerage firm auditing.

EDUCATION

C. W. Post College of Long Island University, Greenvale, NY

BS Accounting, 1969

SKILLS /
HOBBIES

Excel, Lotus 1-2-3, WordPerfect, MS Word, QuickBooks

Owner, Snowblanket Farm; Appaloosa/Palomino Horses

Avid college sports fan, particularly Women's and Men's Basketball and Football



2012 SANTA FE COUNTY
CONFLICT OF INTEREST
AND
FINANCIAL DISCLOSURE STATEMENT

LOEWY JOSEPH L.
Last Name First Name Middle Initial

N/A N/A
Work Address Work Phone Number

[REDACTED]
Home Address Home Phone Number

COMMISSIONER SF COUNTY HOUSING AUTHORITY
Job Title Department/Division/Office

Filing Status:

☐ Candidate for Office ☐ Incumbent Elected Official ☐ County Employee ☐ Appointed Official ☒ Volunteer

CAROL S. LOEWY N/A
Name of Spouse Spouse's Employer

1. Real Estate

List all real property that you own in Santa Fe County and provide the address (es) or, if there is no address or if the address provides insufficient information to describe a large piece of property, a general description of the location of the property. List all real property in Santa Fe County in which you have any interest whatsoever, including outright ownership, an option to purchase, leasehold, or other interest.

RESIDENCE: [REDACTED]
RENTAL CONDO (SPOUSE 50%) 601 W. SAN MATEO ROAD SANTA FE, NM 87505
UNIT #88

2. Interest in a Business

List any interest that you have in a business organization, either as owner, part owner, partner (general or limited), or shareholder, in which you own more than two percent of the outstanding stock or more than two percent ownership interest, or in which you serve as general or managing partner, if that business does business with the County in an amount in excess of \$7,500.00 annually.

SANTA FE 88, LLC (SPOUSE 50% - SEE ABOVE)

3. Gifts

Identify each person from which you received either directly or indirectly, any gift or gifts having an aggregate value of more than \$250.00 within the taxable year proceeding the time of filing. This does not include any gift from a parent, grandparent, child, grandchild, brother, sister, parent-in-law, grandparent-in-law, brother-in-law, sister-in-law, uncle, aunt, niece, nephew, spouse, boyfriend, girlfriend, domestic partner, fiancé, or fiancée.

NONE

4. Financial Interests

List any financial interest that is: (i) an ownership interest or other interest in any contract or prospective contract with the County; (ii) an interest in the sale of real or personal property to or from the County; (iii) a financial relationship with a person or business whose interests may be affected by the County; (iv) any employment or prospective employment for which negotiations have already begun where the prospective employer has an interest in the sale of real or personal property to or from the County; or (v) any other interest that may be affected by the County.

NONE

5. Memberships on Boards of For-Profit or Non-Profit Businesses

List any boards of, for-profit or non-profit organizations that you or your spouse serve on.

NONE IN NEW MEXICO (RESIDENCE STARTED 8/1/12)

EXECUTIVE BOARD (SECRETARY) CONN-NAIRO (RESIGNED 7/31/12)

MEMBER TOWN OF SIMSBURY AGING + DISABILITIES COMMISSION (RESIGNED 7/31/12)

6. Professional Licenses in New Mexico

If you or your spouse hold any professional licenses in New Mexico to engage in a profession, such as medicine, law, cosmetology, construction, etc., please list below. Driver's licenses do not apply.

Type of License

Licensee

NONE

7. Additional Information

Include below any pertinent financial interests or information that the preceding categories have not revealed.

RETIRED 7/31/12 EXECUTIVE DIRECTOR, HOUSING

AUTHORITY OF THE TOWN OF SIMSBURY (CONNECTICUT)

BLOCK CAPTAIN, ELDERADO NEIGHBORHOOD WATCH, 1/13.

Signature

Date

State of New Mexico)

) SS.

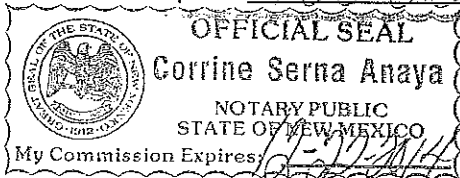
COUNTY OF SANTA FE)

The foregoing instrument was acknowledged before me this 19th day of February, 2013

by

Notary Public

My Commission Expires: 12-22-2014



**QUESTIONS FOR APPLICANTS SEEKING APPOINTMENT TO A BOARD,
COMMITTEE OR TASK FORCE**

Applicant Name Joseph L. Loewy

Committee Santa Fe County Housing Authority

1. Do you have any contracts, leases or other work with County government? If you are employed, does your employer have any contracts, leases or other work with County government? If yes, please explain.

None

2. Have you appeared in front of the Board of County Commissioners, County Development Review Committee, or any other committee, board or task force of the County? If so, state the subject matter at issue, the approximate dates, the action (if any) that was taken, the capacity in which you served, and any other relevant information.

No

3. Do you lobby County government? If yes, please explain.

No

4. Are you related to any County employees or elected officials? If yes, who are you related to and how are you related?

No

5. Will you consent to a background investigation of your fitness to serve?

Yes

6. Do you have any applications pending before the County or do you have plans to submit any applications to the County? If so please identify in detail the applications or potential applications.

None

Inquiry Authorization Release

In connection with my application to sit on a Santa Fe County Board or Committee, I understand and agree that background inquiries may be requested by Santa Fe County. Furthermore, I understand and agree that Santa Fe County may request information from various Federal, State, and other agencies, including private and public sources which maintain records concerning my past activities to include information about any criminal activity.

The following information is my complete and legal name and all information is true and correct to the best of my knowledge.

Last Name: Loewy

First Name: Joseph

Middle Name: Louis

Aliases: None


Date of Birth: [REDACTED]

Place of Birth: [REDACTED]

Social Security Number: _____ Leave This Blank,
Human Resources or I will Call You and Request the number when paperwork is completed

Residence Address: [REDACTED]
[REDACTED]

Drivers License Number and State: [REDACTED]

 2/19/13
Applicants Signature

February 21, 2013

Santa Fe County Housing Authority
52 Camino de Jacobo
Santa Fe, New Mexico
87507

Attn: Executive Director, Ron Pacheco

Re: Letter of Interest
Housing Authority Board

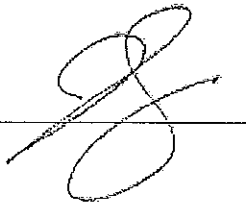
Dear Ron,

Please allow this letter to express my interest in servicing on the Santa Fe County's Housing Authority board. My wife and I have resided in Santa Fe County for the past 14 years and are dedicated to our communities progressive future.

Over the past several years I have been both personally and professionally active in the development and design of high-quality sustainable affordable housing in our community and would be honored to bring my knowledge and passion to the Housing Authority Board.

With my regards,

Jonah Stanford

A handwritten signature in black ink, consisting of a large, stylized 'J' and 'S' intertwined, written over a horizontal line.

NEEDBASED

JONAH STANFORD

Certifications & Licenses

Certified Passive House Consultant - PHIUS
Licensed Commercial / Residential Contractor
Architectural Registration Examinations in process

Tools: Revit, Sketchup, PHPP, Windows & Mac platforms.

Professional Profile

- Record of developing collaborative architectural and planning solutions that are both affordable and sustainable.
- Project leadership ability based on twelve years of diverse integrated design and team management experience.
- Holds a passionate belief in the positive impacts of sustainable and affordable development for the benefit of the entire community.

Experience

2002 - present	NEEDBASED Inc. - Principal Architecture	Manages all phases of Architectural services from first-contact to construction administration. NEEDBASED also provides consulting services on energy conservation, historic preservation, and affordable house development. Clients include, Santa Fe Public Schools, Los Alamos National Laboratories, and The Housing Trust.
2007 - 2009	HOMEWISE Inc. - Project Manager Affordable Housing	Managed land acquisition, neighborhood planning, architectural development and home construction for affordable housing non-profit.
2001 - 2007	CROCKER & ASSO. - Project Manager Historic Preservation	Responsible for new client development and providing consulting services for the historic restoration and preservation of federal and state registered projects.

Education

1993 - 1995	Academie voor Beeldende Kunst & Vormgeving - Netherlands / Post-baccalaureate Degree Fine Art
1991 - 1993	The School of the Art Institute of Chicago

Professional Contributions

Passive House New Mexico / Founder	2012 - present
NM Mortgage Finance Authority / Architectural Review Committee	2011 - 2012
SF Area Home Builders Association / Green Building Council	2011 - 2012
Passive House Institute US / Founding Board Member	2008 - 2009
Passive House Institute US / Board President	2009 - 2011
NM Construction Industries Division Committee / Earthen Building Code	2005 - 2006

Professional Associations

Passive House Alliance US
American Passive House Network
US Green Building Council
Santa Fe Green Building Council

Awards

2012	ECOHOME Magazine Grand Design Award -- VolksHouse Sustainable Santa Fe Award -- Balance Project USGBC New Mexico Best Indoor Air Quality -- Balance Project USGBC New Mexico Best Energy Efficiency -- Volkshouse
2011	Haciendas Innovative Architectural Award -- Balance Project Haciendas Grand Green Award -- Balance Project Haciendas Site & Resource Efficiency Award -- Balance Project Haciendas Best Design Award -- Balance Project
2010	City of Santa Fe Muchas Gracias Award -- Alto Street Design City of Santa Fe Historic Preservation Award -- Amado Street
2009	Greenworks Competition Design/Winner -- Alto Street
2008	National Council on Historic Preservation -- V-Site (Crocker & Asso.) NM State Historic Preservation Office -- Hubble (Crocker & Asso.)
2007	NM State Historic Preservation Office -- V-Site (Crocker & Asso.)

Publications

2012	Folio: La casa del pueblo Inhabitat: Affordable Net Zero Energy Su Casa Magazine: Striking a Balance inthrall: Contemporary Passive House Inhabitat: Balance Project / Santa Fe Modern Architecture4us: Green Architecture of VolksHouse MOCO Design: VolksHouse Business Weekly: Eco-friendly Homes Energy Design: Finding a Balance Jetson Green: VolksHouse is a Passive House
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JONAH STANFORD

Certifications & Licenses

Certified Passive House Consultant - PHIUS
Licensed Commercial / Residential Contractor
Architectural Registration Examinations in process

Tools: Revit, Sketchup, PHPP, Windows & Mac platforms.

Professional Profile

- Record of developing collaborative architectural and planning solutions that are both affordable and sustainable.
- Project leadership ability based on twelve years of diverse integrated design and team management experience.
- Holds a passionate belief in the positive impacts of sustainable and affordable development for the benefit of the entire community.

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2011	Haciendas Innovative Architectural Award – Balance Project Haciendas Grand Green Award – Balance Project Haciendas Site & Resource Efficiency Award – Balance Project Haciendas Best Design Award – Balance Project
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Publications

2012	
Folio:	La casa del pueblo
Inhabitat:	Affordable Net Zero Energy
Su Casa Magazine	Striking a Balance
inthrall:	Contemporary Passive House
Inhabitat:	Balance Project / Santa Fe Modern
Architecture4us:	Green Architecture of VolksHouse
MOCO Design:	VolksHouse
Business Weekly:	Eco-friendly Homes
Energy Design:	Finding a Balance
Jetson Green:	VolksHouse is a Passive House

**QUESTIONS FOR APPLICANTS SEEKING APPOINTMENT TO A BOARD,
COMMITTEE OR TASK FORCE**

Applicant Name _____Jonah Stanford_____

Committee _____Housing Board_____

1. Do you have any contracts, leases or other work with County government? If you are employed, does your employer have any contracts, leases or other work with County government? If yes, please explain.

_____No, in 2009 I completed a small consulting contract for the county regarding affordable housing development opportunities.

2. Have you appeared in front of the Board of County Commissioners, County Development Review Committee, or any other committee, board or task force of the County? If so, state the subject matter at issue, the approximate dates, the action (if any) that was taken, the capacity in which you served, and any other relevant information.

_____In the summer of 2009, I appeared in front of the board to answer questions regarding possible opportunities available to the county for affordable housing development. No, actions were taken.

3. Do you lobby County government? If yes, please explain.

_____No_____

4. Are you related to any County employees or elected officials? If yes, who are you related to and how are you related?

_____No_____

5. Will you consent to a background investigation of your fitness to serve?

_____Yes_____

6. Do you have any applications pending before the County or do you have plans to submit any applications to the County? If so please identify in detail the applications or potential applications.

_____No_____

Inquiry Authorization Release

In connection with my application to sit on a Santa Fe County Board or Committee, I understand and agree that background inquiries may be requested by Santa Fe County. Furthermore, I understand and agree that Santa Fe County may request information from various Federal, State, and other agencies, including private and public sources which maintain records concerning my past activities to include information about any criminal activity.

The following information is my complete and legal name and all information is true and correct to the best of my knowledge.

Last Name: Stanford

First Name: Jonah

Middle Name: Hillary

Aliases: none

Date of Birth: [REDACTED]

Place of Birth: [REDACTED]

Social Security Number: _____ Leave This Blank,
Human Resources or I will Call You and Request the number when paperwork is completed

Residence Address: [REDACTED]

Drivers License Number and State: [REDACTED]

Applicants Signature

