

**Housing Authority of St. Louis County  
Board of Commissioners  
Regular Meeting**

Tuesday, January 9, 2024 at 12 pm  
Housing Authority of St. Louis County  
8865 Natural Bridge Rd., St. Louis, MO 63121

Agenda Item	Individual	Action
1. Call to Order	Chairman	Informational
2. Roll Call	Terri Acoff-States	Informational
3. Reading and Approval of Minutes Regular Meeting held November 14, 2023	Chairman	Motion Second Vote
4. Public Comments	Chairman	Informational
5. Report of the Executive Director	Shannon Koenig	Informational
6. Reports of Officers and Employees		
A. Financial Reports for period ending October 31, 2023	Carolyn Riddle	Motion Second Vote
B. Housing Choice Voucher Program Report	Nicole Alexander	Informational
C. Housing Administration Report	Kawanna Tate	Informational
D. Facilities and Maintenance Report	Katrina Sommer	Informational
E. Real Estate Development Report	Kurt Schulte	Informational
F. Customer Service Survey Results Report	Anna Holyan	Informational
7. Unfinished Business	Chairman	Informational
8. New Business		
A. Bond Inducement for Parkview Place Apartments, SDG Housing Partners, Resolution No. 1433	Kurt Schulte Lon Booher, Development Partner, SDG Housing Partners	Motion Second Vote
B. Annual Meeting	Chairman	Motion Second Vote
9. Executive Session	Chairman	Motion Second Vote
Subject to an affirmative vote of the Board of Commissioners, an Executive Session may be held to discuss personnel issues, real estate, or litigation matters pursuant to RSMo Sections 610.021 to 610.022.		
10. Announcements Next Regular Meeting March 12, 2024	Chairman	Informational
11. Adjournment	Chairman	Motion Second Vote

HOUSING AUTHORITY OF ST. LOUIS COUNTY  
BOARD OF COMMISSIONERS MEETING  
TUESDAY, NOVEMBER 14, 2023  
MEETING MINUTES

ATTENDANCE:

COMMISSIONERS:

David Nehrt-Flores, Vice Chairman  
Lora Gulley, Commissioner  
Joan Kelly Horn, Commissioner  
Reverend Gabrielle N.S. Kennedy, Commissioner

STAFF:

Shannon Koenig, Executive Director and CEO  
Terri Acoff-States, Executive Assistant  
Katrina Sommer, Interim Chief Operating Officer  
Judy Ricks, Chief Administrative Officer  
Kawanna Tate, Director, Housing Administration  
Emily Smith, Director, Program Compliance and Training  
Anna Holyan, Director, Strategic Initiatives  
Carolyn Riddle, Interim Finance Director  
Kurt Schulte, Development Officer

PUBIC:

Brenda Haddad, Kittle Property Group, Inc.  
Mita Biswas, Resident

ABSENT:

Bishop Calvin Scott, Chairman  
LaToya Scott, Commissioner

Public Hearing:

The board meeting opened with a public hearing on the proposed Admissions and Continued Occupancy Policy, also known as the ACOP. The purpose of this hearing was to allow the public an opportunity to comment on the draft ACOP.

Vice Chairman David Nehrt-Flores called to order the public hearing and invited anyone from the public to comment. There were no public comments. The hearing was adjourned.

Vice Chairman David Nehrt-Flores called to order and opened the regular meeting.

Reading and Approval of Minutes of Regular Board Meeting held Tuesday, September 12, 2023:

Vice Chairman David Nehrt-Flores asked for a motion to approve the minutes of the regular board meeting held Tuesday, September 12, 2023. Commissioner Lora Gulley motioned for approval, Commissioner Gabrielle Kennedy seconded the motion and upon roll call the "Ayes" and "Nays" were as follows:

AYES

D. Nehrt-Flores  
L. Gulley  
J. Kelly Horn  
G. Kennedy

NAYS

None

The Vice Chairman declared the motion passed.

Reading and Approval of Minutes of Special Board Meeting held Tuesday, October 3, 2023:

Vice Chairman David Nehrt-Flores asked for a motion to approve the minutes of the special board meeting held Tuesday, October 3, 2023. Commissioner Joan Kelly Horn motioned for approval, Commissioner Lora Gulley seconded the motion and upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores L. Gulley J. Kelly Horn G. Kennedy	None

The Chairman declared the motion passed.

PUBLIC COMMENTS:

There were no public comments.

REPORT OF THE EXECUTIVE DIRECTOR:

Ms. Koenig greeted everyone and thanked them for attending the meeting.

Ms. Koenig thanked the commissioners who were able to attend the first annual celebration of service. She stated it was a pleasure to honor their contributions and share food and fellowship with commissioners from all four housing authorities managed by County Housing.

Ms. Koenig updated the board on the Housing Authority's new brand, stating all the elements are coming together. She said staff anticipates launching the new brand, including new logos and the new website, early next year.

Ms. Koenig informed the board that the Department of Housing and Urban Development (HUD) Region 7 public housing director for our area, Craig Dobson, requested a tour of the Wellington Family Homes project for Principal Deputy Assistant Secretary Richard Monocchio and Deputy Assistant Secretary Dr. Felecia Gaither last month. All the HUD officials on the tour were very pleased with the progress of the rehabilitation and were impressed with the amount of collaboration taking place in Wellston.

Ms. Koenig said looking ahead, staff are beginning to assess the Authority's accomplishments for the year and plan activities for 2024. She stated In 2024, the Authority's core objectives will remain the same. Ms. Koenig welcomed commissioners to provide input into goals for 2024.

REPORTS OF OFFICERS AND EMPLOYEES:

A. Financial Reports for the period ending August 31, 2023:

Ms. Riddle reviewed the Financial Reports for the period ending August 31, 2023. After discussion, Vice Chairman David Nehrt-Flores asked for a motion to approve the August 31, 2023 Financial Reports as read. Commissioner Gabrielle Kennedy moved for approval, Commissioner Joan Kelly Horn seconded the motion. Upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores L. Gulley J. Kelly Horn G. Kennedy	None

The Vice Chairman declared the motion passed.

B. Housing Choice Voucher Report:

Ms. Sommer presented the board with a Section Eight Management Assessment Program (SEMAP) update as well as programmatic updates.

C. Housing Administration Report:

Ms. Tate reviewed the Housing Administration Report.

D. Facilities and Maintenance Report:

Ms. Sommer reviewed the monthly maintenance and supply costs for the Housing Authority of St. Louis County public housing from September 1 through October 31, 2023.

E. Real Estate Development Report:

Mr. Schulte provided an overview of the current development activities of the Housing Authority. He gave an update on the Wellington Family Homes redevelopment. He stated this project is underway and construction is progressing on schedule.

Mr. Schulte updated the Board on the Arbor Hill Apartments redevelopment. He stated the Authority and the development have made significant progress with the RAD and HUD loan processes. He said final plans for the off-site detention area have been completed and are being priced.

Mr. Schulte informed the board of future development plans. He stated the Authority was approached by St. Louis County to assist with a transitional housing project on the site of the Weinman Center. The Authority has applied for 50 LIHTC-assisted units at the site and will act as the developer and owner of the project. An application for 4% LIHTC is in process and was submitted on September 22nd. The Authority also worked with representatives of Peace United Church of Christ in Webster Groves to examine the possibility of locating affordable housing on their former church grounds. After studying the property, assessing market demand, and meeting with local leaders and stakeholders, the Authority decided to team up with Peace and act as co-developer and co-owner of a 52 unit, LIHTC-assisted senior housing development. An application for 9% LIHTC was submitted on September 22nd.

F. Agency Performance Report:

Ms. Holyan reviewed the Agency Performance Report.

UNFINISHED BUSINESS:

No unfinished business was discussed.

NEW BUSINESS:

A. Bond Inducement for Triton Pointe Apartments, Kittle Property Group, Inc. Resolution No. 1430:

Mr. Schulte presented Resolution No. 1430 authorizing the Executive Director to deliver a request to the Industrial Development Authority of St. Louis County, Missouri ("IDA") to issue tax-exempt bonds to finance a portion of the new construction of 252 dwelling units in Normandy, Missouri.

After discussion, Vice Chairman David Nehrt-Flores asked for a motion to approve Resolution No. 1430, Bond Inducement for Triton Pointe Apartments. Commissioner Joan Kelly Horn motioned for approval, Commissioner Gabrielle Kennedy seconded the motion. Upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores	None
L. Gulley	
J. Kelly Horn	
G. Kennedy	

The Vice Chairman declared the motion passed.

B. Housing Authority of St. Louis County, Proposed FY 2024 Budget, Resolution No. 1431:

Ms. Koenig presented the board with Resolution No. 1431, Housing Authority of St. Louis County Proposed FY 2024 Budget.

After review and discussion, Vice Chairman David Nehrt-Flores asked for a motion to approve Resolution No. 1431, Housing Authority of St. Louis County, Proposed FY 2024 Budget. Commissioner Gabrielle Kennedy motioned for approval, Commissioner Joan Kelly Horn seconded the motion. Upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores	None
L. Gulley	
J. Kelly Horn	
G. Kennedy	

The Vice Chairman declared the motion passed.

C. Consolidated PHA's FY 2024 Budgets Hillsdale, Olivette, and Pagedale, Resolution No. 1432:

Ms. Koenig presented the board with Resolution No. 1432, Consolidated PHA's, FY 2024 Budgets for Hillsdale, Olivette, and Pagedale.

After review and discussion, Vice Chairman David Nehrt-Flores asked for a motion to approve Resolution No. 1432, Consolidated PHA's FY 2024 Budgets for Hillsdale, Olivette, and Pagedale. Commissioner Joan Kelly Horn motioned for approval, Commissioner Gabrielle Kennedy seconded the motion. Upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores	None
L. Gulley	
J. Kelly Horn	
G. Kennedy	

The Vice Chairman declared the motion passed.

D. Revised Admissions and Continued Occupancy Policy (ACOP):

Ms. Smith presented the board with an overview of the Authority's updates to the Admissions and Continued Occupancy Policy (ACOP). Ms. Smith stated the ACOP is the principal document describing the Authority's policies concerning key topics such as eligibility, tenant selection, admissions preferences, waitlist procedures, rent determination, utilities, transfers, occupancy guidelines, grievance procedures, pet ownership, and the community service and self-sufficiency requirement. She said the ACOP is essential for residents, prospective residents, community members, and HUD staff when communicating about specific Authority policies.

After discussion, Vice Chairman David Nehrt-Flores asked for a motion to approve the revised Admissions and Continued Occupancy Policy (ACOP). Commissioner Gabrielle Kennedy motioned for approval, Commissioner Lora Gulley seconded the motion. Upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores L. Gulley J. Kelly Horn G. Kennedy	None

The Vice Chairman declared the motion passed.

E. Authorization for Shannon Koenig to execute real estate documents as President of West County Properties, Inc., Resolution No. 1429:

Ms. Tate presented the board with Resolution No. 1429, Authorizing Shannon Koenig to execute real estate documents as President of West County Properties, Inc. Ms. Tate stated the authorization would provide Shannon Koenig, Executive Director and CEO, with the decision-making and signing authority for real estate transactions related to West County Properties, Inc.

After discussion, Vice Chairman David Nehrt-Flores asked for a motion to approve Resolution No. 1429, Authorization for Shannon Koenig to execute real estate documents as President of West County Properties, Inc. Commissioner Joan Kelly Horn motioned for approval, Commissioner Lora Gulley seconded the motion. Upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores L. Gulley J. Kelly Horn G. Kennedy	None

The Vice Chairman declared the motion passed.

F. 2024 Board Meeting Schedule:

Ms. Koenig presented the Board with the 2024 proposed Board meeting dates. Ms. Koenig stated the new schedule would provide for five meetings per year on the second Tuesday of the month on the following schedule: January, March, May, September, and November. This allows for a break in the summer and during the holiday season.

After discussion, Vice Chairman David Nehrt-Flores asked for a motion to approve the 2024 Board Meeting Schedule. Commissioner Joan Kelly Horn motioned for approval, Commissioner Lora Gulley seconded the motion. Upon roll call the "Ayes" and "Nays" were as follows:

<u>AYES</u>	<u>NAYS</u>
D. Nehrt-Flores L. Gulley J. Kelly Horn G. Kennedy	None

The Vice Chairman declared the motion passed.

EXECUTIVE SESSION:

An Executive Session was not held.

ANNOUNCEMENTS:

The next meeting is scheduled for Tuesday, January 9, 2024.

ADJOURNMENT OF MEETING:

There being no further business to come before the Board, Vice Chairman David Nehrt-Flores asked for a motion to adjourn the meeting. Commissioner Gabrielle Kennedy moved for adjournment, which was seconded by Commissioner Joan Kelly Horn. Upon roll call the "Ayes" and "Nays" were as follows:

AYES

- D. Nehrt-Flores
- L. Gulley
- J. Kelly Horn
- G. Kennedy

NAYS

None

The Vice Chairman declared the motion passed.

\_\_\_\_\_  
Chairman

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Date

## Memorandum



**To:** Board of Commissioners, Housing Authority of St. Louis County

**From:** Shannon Koenig, Executive Director and CEO

**Date:** January 9, 2024

**Subject:** *Executive Director's Report*

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This memo provides information about select Housing Authority activities.

**I. County Housing Brand Launch**

The agency's rebranding will be complete by the end of this month and includes our new logo, brand identity, website, and moniker.

The new website will be complete this month and is a complete rebuild with several new custom forms and custom pages. There will be a soft launch in February, at which time we would like Commissioners to test the site and provide feedback. After the testing phase, the website and new brand will be officially launched in March.

The official launch will be a series of concerted efforts to reach everyone in the community about the new brand. This will include presenting the new brand to employees, residents, and stakeholders. We will also issue a press release and put information about the new brand on our new website. We will enlist staff and board members to help spread the word via social media and other channels.

We will continue to keep you updated as we have more information.

**II. The Year Ahead**

In 2024, our core objectives will remain the same. Staff are discussing key results for the year and will report those at the next meeting.

The 2023 customer service survey results, which are part of this board packet, provide information about how well we are meeting our second objective to ensure residents, landlords, and employees feel respected during interactions with the Authority. The results show that overall, resident satisfaction in the public housing and voucher programs was down in 2023. Landlord satisfaction has remained consistent with last year.

In brief, the survey results reflect changes that took place in 2023, including the transition to in-house management of public housing and process improvements in HCV. In 2024, we will incorporate customer feedback into operational decisions. Our goal to provide excellent customer service remains a priority.





**To:** Board of Commissioners, Housing Authority of St. Louis County

**Through:** Shannon Koenig, Executive Director and CEO

**From:** Carolyn Riddle, Interim Finance Director

**Date:** January 09, 2024

**Subject:** *Financial Summary*

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This memo provides a financial summary of activities through October 31, 2023.

**I. Recommendation**

Staff recommend the Board approve the financial statements, as prepared.

**II. Highlights**

**A. Revenue**

The total operating income is under budget by \$1,206,325. The timing of the capital funds drawdowns contributed to this variance. In addition, the operating subsidy has been less than anticipated this year. Bad debt on HCV for \$327,000 was not anticipated. The anticipated developer fee income has not been realized yet for the sale of AMP 4. Lastly, no funds have been received for the mobility grant which was anticipated through April.

**B. Expense**

Total operating expense is over budget by \$1,361,238. This variance is primarily due to tenant services related to the flooding at Fee Fee Manor and tenant rent and utility reimbursements being more than anticipated.

**C. Net Income (Loss)**

The total net operating loss is \$2,042,864. However, the total net loss is \$2,295,496 including depreciation and gain/ loss on treasury investments.

**D. Cash**

- i. As of October 31, 2023, the cash balance in the USB Agency Disbursing operating bank account was \$2,623,312, of which \$362,253 is restricted. The operating subsidy received for the month was \$112,503 and total rent received was \$20,781.
- ii. HCV cash balance \$1,327,991 with \$0 restricted. The total Housing Assistance Payment (HAP) received was \$4,944,932 and admin fee received was \$417,803. HAP expenses were \$4,893,527.

**III. Attachments**

- A. Budgeted Income Statement
- B. Cash Report

**Housing Authority of St. Louis County  
Budgeted Income Statement  
SUMMARY - ALL  
As of October 31, 2023**

		Entity Wide			COCC			AMP's			HCV - ALL			BA			Mod Rehab		
		YTD Actual	YTD Budget	Variance	YTD Actual	YTD Budget	Variance	YTD Actual	YTD Budget	Variance	YTD Actual	YTD Budget	Variance	YTD Actual	YTD Budget	Variance	YTD Actual	YTD Budget	Variance
<b>OPERATING ITEMS</b>																			
4099-00-940	Total Voucher Grants	52,179,842	51,574,835	605,007	-	-	-	-	-	-	52,179,842	51,574,835	605,007	-	-	-	-	-	-
4199-00-940	Total Operating Subsidy	989,730	1,100,479	(110,749)	-	-	-	932,681	968,841	(36,160)	-	-	-	-	-	-	57,049	131,638	(74,589)
4299-00-940	Total Capital Grants	-	1,431,848	(1,431,848)	-	-	-	-	1,431,848	(1,431,848)	-	-	-	-	-	-	-	-	-
4399-00-940	Total Tenant Charges	799,228	575,580	223,648	1,000	1,200	(200)	767,899	555,789	212,110	385	-	385	18,050	18,592	(542)	-	-	-
4499-00-940	Total Fraud Recovery	636	29,167	(28,531)	-	-	-	-	-	-	636	29,167	(28,531)	-	-	-	-	-	-
4599-00-250	Total Investment Income	146,833	329,393	(182,560)	2,135	415	1,720	19	-	19	81,058	41,799	39,258	63,621	287,178	(223,558)	-	-	-
4699-00-950	Total Miscellaneous Other Income	26,632	281,541	(254,909)	104,452	72,898	31,554	150,942	19,897	131,045	(244,183)	46,660	(290,843)	15,421	142,087	(126,666)	-	-	-
4997-00-950	Total Internal Income	1,606,878	1,633,262	(26,384)	1,606,878	1,633,262	(26,384)	-	-	-	-	-	-	-	-	-	-	-	-
	<b>Total Income</b>	<b>55,749,779</b>	<b>56,956,104</b>	<b>(1,206,325)</b>	<b>1,714,465</b>	<b>1,707,775</b>	<b>6,690</b>	<b>1,851,542</b>	<b>2,976,374</b>	<b>(1,124,832)</b>	<b>52,017,738</b>	<b>51,692,461</b>	<b>325,276</b>	<b>97,092</b>	<b>447,857</b>	<b>(350,765)</b>	<b>57,049</b>	<b>131,638</b>	<b>(74,589)</b>
5999-00-940	Total Rents and Utility Reimbursements	48,945,877	47,001,063	1,944,815	-	-	-	42,017	39,008	3,009	48,794,893	46,858,290	1,936,603	-	-	-	108,967	103,765	5,202
6299-00-940	Total Salaries	3,159,400	3,651,066	(491,666)	818,501	733,649	84,851	559,525	919,768	(360,243)	1,674,259	1,914,548	(240,289)	107,115	66,850	40,265	-	16,250	(16,250)
6599-00-940	Total Benefits and Taxes	841,754	1,423,147	(581,394)	180,439	280,757	(100,318)	150,375	364,685	(214,310)	490,368	712,580	(222,212)	20,571	60,575	(40,004)	-	4,550	(4,550)
6699-00-940	Total Other Employee Costs	329	2,110	(1,780)	329	1,901	(1,572)	-	-	-	-	208	(208)	-	-	-	-	-	-
6799-00-940	Total Training, Seminars, Conferences	22,861	30,891	(8,030)	20,357	19,873	484	78	1,220	(1,142)	2,426	9,011	(6,585)	-	787	(787)	-	-	-
	<b>Total Admin Expenses</b>	<b>52,970,221</b>	<b>52,108,276</b>	<b>861,944</b>	<b>1,019,627</b>	<b>1,036,181</b>	<b>(16,555)</b>	<b>751,995</b>	<b>1,324,680</b>	<b>(572,686)</b>	<b>50,961,947</b>	<b>49,494,637</b>	<b>1,467,310</b>	<b>127,686</b>	<b>128,213</b>	<b>(527)</b>	<b>108,967</b>	<b>124,565</b>	<b>(15,598)</b>
7099-00-950	Total Utilities	654,956	289,638	365,317	39,629	37,044	2,585	255,589	239,546	16,043	15,745	10,599	5,145	342,157	2,449	339,707	-	-	-
7199-00-950	Total Materials	130,212	36,475	93,737	7,141	519	6,622	114,551	35,803	78,748	-	-	-	-	153	(153)	-	-	-
7299-00-950	Total Contract Costs	712,885	527,899	184,987	46,823	52,312	(5,490)	526,885	471,102	55,783	113	417	(303)	136,294	4,068	132,226	-	-	-
7399-00-950	Total Tenant Services Expense	254,231	66,986	187,245	(2,700)	-	(2,700)	189,359	23,295	166,064	48,590	786	47,804	18,982	42,906	(23,923)	-	-	-
7499-00-950	Total Other Maintenance Expenses	20,448	24,582	(4,134)	1,656	629	1,027	18,792	23,953	(5,161)	-	-	-	-	-	-	-	-	-
7599-00-950	Total Outside Services	11,400	46	11,354	10,400	-	10,400	1,000	-	1,000	-	-	-	-	46	(46)	-	-	-
7699-00-950	Total Other Occupancy Expenses	170,915	150,034	20,881	224	-	224	87,199	45,932	41,267	82,743	104,025	(21,282)	722	78	644	-	-	-
	<b>Total Occupancy Expenses</b>	<b>1,955,048</b>	<b>1,095,661</b>	<b>859,387</b>	<b>103,173</b>	<b>90,505</b>	<b>12,669</b>	<b>1,193,374</b>	<b>839,631</b>	<b>353,744</b>	<b>147,191</b>	<b>115,826</b>	<b>31,365</b>	<b>498,155</b>	<b>49,700</b>	<b>448,456</b>	<b>-</b>	<b>-</b>	<b>-</b>
8099-00-950	Total Insurance	172,159	159,924	12,235	21,753	46,329	(24,576)	102,165	92,213	9,952	7,688	17,477	(9,789)	657	3,904	(3,247)	-	-	-
8199-00-950	Total Outside Services	275,486	406,284	(130,799)	143,015	355,037	(212,022)	61,332	-	61,332	71,074	34,167	36,907	65	17,081	(17,016)	-	-	-
8299-00-950	Total Professional Fees	317,459	189,010	128,449	200,063	100,000	100,063	7,476	4,252	3,223	108,455	83,864	24,591	-	671	(671)	291	223	68
8399-00-950	Total Other Fees	145,649	292,720	(147,070)	55,933	54,609	1,324	(21,871)	2,952	(24,823)	111,588	234,784	(123,196)	0	375	(375)	-	-	-
8499-00-950	Total Telephone and Technology	172,487	285,769	(113,282)	54,025	68,640	(14,615)	17,968	18,535	(567)	99,310	196,333	(97,023)	969	2,160	(1,192)	157	101	56
8599-00-950	Total Other Administrative Expenses	196,605	163,813	32,792	97,236	56,758	40,478	25,053	45,383	(20,330)	74,746	60,730	14,017	16	943	(927)	-	-	-
8996-00-950	Total Internal Charges	1,587,529	1,729,948	(142,419)	-	-	-	215,511	320,367	(104,856)	1,367,640	1,403,682	(36,042)	2,250	1,219	1,031	-	4,680	(4,680)
	<b>Total Other General Expenses</b>	<b>2,867,375</b>	<b>3,227,468</b>	<b>(360,093)</b>	<b>572,023</b>	<b>681,372</b>	<b>(109,348)</b>	<b>407,634</b>	<b>483,702</b>	<b>(76,068)</b>	<b>1,840,500</b>	<b>2,031,036</b>	<b>(190,536)</b>	<b>3,957</b>	<b>26,354</b>	<b>(22,397)</b>	<b>448</b>	<b>5,004</b>	<b>(4,556)</b>
	<b>Total Expenses</b>	<b>57,792,643</b>	<b>56,431,405</b>	<b>1,361,238</b>	<b>1,694,823</b>	<b>1,808,057</b>	<b>(113,234)</b>	<b>2,353,003</b>	<b>2,648,013</b>	<b>(295,011)</b>	<b>52,949,638</b>	<b>51,641,499</b>	<b>1,308,138</b>	<b>629,798</b>	<b>204,266</b>	<b>425,532</b>	<b>109,415</b>	<b>129,569</b>	<b>(20,154)</b>
	<b>Total Operating Income (Loss)</b>	<b>(2,042,864)</b>	<b>524,699</b>	<b>(2,567,563)</b>	<b>19,641</b>	<b>(100,283)</b>	<b>119,924</b>	<b>(501,461)</b>	<b>328,361</b>	<b>(829,822)</b>	<b>(931,900)</b>	<b>50,962</b>	<b>(982,862)</b>	<b>(532,706)</b>	<b>243,590</b>	<b>(776,296)</b>	<b>(52,366)</b>	<b>2,069</b>	<b>(54,435)</b>
<b>NON-OPERATING ITEMS</b>																			
9099-00-930	Investment Gain/ Loss on Treasury Strips	488	12,211	(11,723)	-	-	-	-	-	-	-	-	-	488.20	12,211.40	(11,723.20)	-	-	-
9099-00-930	Total Depreciation Expense	(253,120)	(219,204)	(33,916)	(6,819)	(6,819)	0.50	(203,892.89)	(187,932.24)	(15,960.65)	-	-	-	(41,918.60)	(24,452.60)	(17,466.00)	-	-	-
	<b>Total Non- Operating Items</b>	<b>(252,632)</b>	<b>(206,993)</b>	<b>(45,639)</b>	<b>(6,819)</b>	<b>(6,819)</b>	<b>0.50</b>	<b>(203,892.89)</b>	<b>(187,932.24)</b>	<b>(15,960.65)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(41,430.40)</b>	<b>(12,241.20)</b>	<b>(29,189.20)</b>	<b>-</b>	<b>-</b>	<b>-</b>
	<b>Net Income (Loss)</b>	<b>(2,295,496)</b>	<b>317,706</b>	<b>(2,613,202)</b>	<b>12,823</b>	<b>(107,102)</b>	<b>119,925</b>	<b>(705,354)</b>	<b>140,429</b>	<b>(845,782)</b>	<b>(931,900)</b>	<b>50,962</b>	<b>(982,862)</b>	<b>(574,137)</b>	<b>231,349</b>	<b>(805,485)</b>	<b>(52,366)</b>	<b>2,069</b>	<b>(54,435)</b>

**St. Louis County Housing Authority  
Cash Report  
October 2023**

Yardi Code	USB Agency Disbursing 004ap	HCV Cash 004hcv	AMP 1 OPERATING 04amp1op	AMP 2 SFH OPERATING 04amp2op	WCP OPERATING ACCOUNT 004wcpop	MARKET RATE UNITS OPERATING 004mktop	NSP OPERATING 004nspop	HASLC	Component Unit Cash compunit
<b>BEGINNING BOOK CASH BALANCE 10/1/2023</b>	\$ 1,621,893.75	\$ 2,810,848.45	\$ 87,839.18	\$ 67,817.70	\$ 5,650.30	\$ 4,366.86	\$ 30,477.67	\$ 4,628,893.91	\$ 2,308,131.00
<b>ADD:</b>									
Tenant Rent	20,781.41	\$ -	\$ 35,150.00	\$ 19,344.42	\$ 3,525.00	\$ 2,610.00	\$ 7,463.00	\$ 88,873.83	\$ -
Security Deposits	-	\$ -						\$ -	\$ -
FSS Deposits	-	\$ -						\$ -	\$ -
Other Deposits	124,670.71							\$ 124,670.71	\$ -
HAP Income	-	\$ 4,944,932.00						\$ 4,944,932.00	\$ -
Operating Subsidy / Admin Fee	112,503.03	\$ 417,803.00						\$ 530,306.03	\$ -
Interest	-	\$ -	\$ 9.64	\$ 5.83	\$ 0.49	\$ 0.41	\$ 3.57	\$ 19.94	\$ -
Transfer	2,243,168.11	\$ 96,082.94						\$ 2,339,251.05	\$ -
Other Revenue - Housing Enterprise Insurance		\$ -						\$ -	\$ -
<b>TOTAL DEPOSITS</b>	<b>2,501,123.26</b>	<b>\$ 5,458,817.94</b>	<b>\$ 35,159.64</b>	<b>\$ 19,350.25</b>	<b>\$ 3,525.49</b>	<b>\$ 2,610.41</b>	<b>\$ 7,466.57</b>	<b>\$ 8,028,053.56</b>	<b>\$ -</b>
<b>LESS:</b>									
Other Transfers	(181,303.67)	\$ (1,927,076.81)						\$ (2,108,380.48)	\$ -
Manual Checks	-	\$ -	\$ (1,775.00)	\$ (13,125.12)			\$ (287.98)	\$ (15,188.10)	\$ -
Checks	(192,656.23)	\$ (121,070.84)	\$ (34,888.49)	\$ (36,101.50)	\$ (3,578.37)	\$ (1,660.81)	\$ (3,388.72)	\$ (393,344.96)	\$ -
Payroll/Payroll Benefits Payment	(383,300.88)							\$ (383,300.88)	\$ -
HAP payments		\$ (4,893,527.30)						\$ (4,893,527.30)	\$ -
Withdraws/Other Deductions	(742,444.26)	\$ -						\$ (742,444.26)	\$ -
Operating Subsidy Out	-	\$ -						\$ -	\$ -
<b>TOTAL PAYMENTS</b>	<b>(1,499,705.04)</b>	<b>\$ (6,941,674.95)</b>	<b>\$ (36,663.49)</b>	<b>\$ (49,226.62)</b>	<b>\$ (3,578.37)</b>	<b>\$ (1,660.81)</b>	<b>\$ (3,676.70)</b>	<b>\$ (8,536,185.98)</b>	<b>\$ -</b>
<b>ENDING BOOK CASH BALANCE 10/31/2023</b>	<b>\$ 2,623,311.97</b>	<b>\$ 1,327,991.44</b>	<b>\$ 86,335.33</b>	<b>\$ 37,941.33</b>	<b>\$ 5,597.42</b>	<b>\$ 5,316.46</b>	<b>\$ 34,267.54</b>	<b>\$ 4,120,761.49</b>	<b>\$ 2,308,131.00</b>
	<i>USB Agency Disbursing</i>	<i>HCV Cash</i>	<i>AMP 1 OPERATING</i>	<i>AMP 2 SFH OPERATING</i>	<i>WCP OPERATING ACCOUNT</i>	<i>MARKET RATE UNITS OPERATING</i>	<i>NSP OPERATING</i>		<i>Component Unit Cash</i>
<b>Ending Bank Balance 10/31/2023</b>	\$ 2,623,311.97	\$ 1,342,731.56	\$ 86,335.33	\$ 37,941.33	\$ 5,597.42	\$ 5,316.46	\$ 34,267.54	\$ 4,135,501.61	\$ 2,308,131.00
Outstanding Checks	-	\$ (14,740.12)						\$ (14,740.12)	\$ -
ACH in Transit	-	\$ -						\$ -	\$ -
Other Items	-	\$ -						\$ -	\$ -
<b>Adjusted Bank Balance 10/31/2023</b>	<b>2,623,311.97</b>	<b>\$ 1,327,991.44</b>	<b>\$ 86,335.33</b>	<b>\$ 37,941.33</b>	<b>\$ 5,597.42</b>	<b>\$ 5,316.46</b>	<b>\$ 34,267.54</b>	<b>\$ 4,120,761.49</b>	<b>\$ 2,308,131.00</b>
Variance	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Cash	2,261,058.89	\$ 1,298,143.44	\$ 86,335.33	\$ 37,941.33	\$ 5,597.42	\$ 5,316.46	\$ 34,267.54	\$ 3,728,660.41	\$ 2,308,131.00
Unrestricted Cash - Bentwood sale	-	\$ -						\$ -	\$ -
Security Deposit Cash	110,670.00	\$ -						\$ 110,670.00	\$ -
Restricted Cash	251,583.08	\$ 29,848.00						\$ 281,431.08	\$ -
	<b>2,623,311.97</b>	<b>\$ 1,327,991.44</b>	<b>\$ 86,335.33</b>	<b>\$ 37,941.33</b>	<b>\$ 5,597.42</b>	<b>\$ 5,316.46</b>	<b>\$ 34,267.54</b>	<b>\$ 4,120,761.49</b>	<b>\$ 2,308,131.00</b>
	-	\$ 0.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.00	\$ -

\* - Other Small Bank Accounts include: Bentwood Social Services, Scholarship Account, Wellston HA Security Deposits, and Windfall Trace



## Memorandum

**To:** Board of Commissioners, Housing Authority of St. Louis County

**Through:** Shannon Koenig, Executive Director and CEO

**From:** Nicole Alexander, Housing Choice Voucher Program Director

**Date:** January 9, 2024

**Subject:** *Housing Choice Voucher Program Updates*

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Below are updates on the Housing Choice Voucher Program, including SEMAP predictions and the Wellington Family Homes Project.

**I. SEMAP**

The 2023 SEMAP Certification is due to HUD no later than February 29<sup>th</sup>, 2024. In preparation, the Authority has completed the audits for the first half of the last calendar year (January through June) and will complete the remainder this month. Staff will request board approval on the final results via email in mid-February.

**A. Indicator #8: Payment Standards**

In 2022, the Authority received 0 out of 5 due to a technical issue with the operating system, Yardi Voyager. Since this issue was brought to our attention, the Authority adopted a new internal procedure to ensure that each payment standard is accurate and not above the standard HUD outlines for each PHA. We anticipate 5 out of 5 points possible for this indicator in 2023.

**B. Indicator #6: HQS Enforcement**

For the 2022 submission, the Authority received 0 out of 10 points for HQS Enforcement. This indicator represents the success of Housing Quality Inspections unit as measured by inspection due dates, abatement processes, and termination processes. In April of 2023 the Authority hired a new Housing Quality Inspections Manager who has improved internal processes and focused on training staff. Internal audit scores are improving and reflect the management change.

**C. All other self-audited indicators**

All other self-audited indicators, such as rent reasonableness, selection from the waiting list, determination of adjusted income, and HQS quality control inspections have no major errors. The Authority anticipates receiving the maximum points available in the 2023 SEMAP Certification.

## II. **Wellington Family Homes Project Update**

The Wellington Family Homes project is the Authority's first project-based voucher site. Throughout 2023, the Authority worked alongside the new owner, Wellington Family Homes, LP, and the new property manager, Allied Orion Group, to establish a wait list for the property.

In April of last year, 23 families were transferred directly from the Public Housing Program to the Project-Based Voucher Program. These families are currently living in the development and still qualify for housing assistance.

In December, the Housing Authority began accepting new applications for the Wellington wait list. The first families that were allowed to apply to this list were the Wellston residents who resided in Wellston when the Authority inherited the project. These "right to return" families had from December 13<sup>th</sup> through January 1<sup>st</sup> to apply for housing prior to this waiting list being made public for applicants. Staff attended one of the monthly Wellston tenant meetings at Wellston City Hall and assisted over 25 families with their applications.

The waitlist will open to the general public early this year.



## Memorandum

**To:** Board of Commissioners, Housing Authority of St. Louis County

**Through:** Shannon Koenig, Executive Director and CEO

**From:** Kawanna Tate, Director of Housing Administration

**Date:** January 9, 2024

**Subject:** *Housing Administration Report*

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The Public Housing Assessment System (PHAS) serves as HUD's tool for evaluating a Public Housing Agency's (PHA) effectiveness in managing its low-rent public housing programs. Employing a centralized approach, HUD gathers individual subsystem scores through diverse sub-indicators, culminating in a composite PHAS score that reflects the PHA's overall performance management. The PHAS scoring system utilizes a 100-point scale across four indicator categories:

- Physical Assessment Subsystem (PASS) - 40 points
- Financial Assessment Subsystem (FASS) - 25 points
- Management Assessment Subsystem (MASS) - 25 points
- Capital Fund Program (CFP) - 10 points

Scores are assigned to each development. The total score determines the PHA's classification under PHAS, with scores below 60 leading to a troubled designation, scores of 90 or above resulting in a high performer designation, and scores between 60 and 90 earning a standard performer designation.

### I. Current MASS Performance

Below is a snapshot of our current performance in each of the sub-indicators of the MASS. The Mass represents 25% of the total PHAS, so it is not a true projection of the final overall score. However, it serves as a good benchmark for our progress.

Sub-Indicator	Performance	Projected Points	Max Points
Occupancy (Average)	96.01	12	16
Accounts Payable Ratio	0.186	4	4
Tenant Account Receivable	0.255	0	5
<b>Current Snapshot</b>	<b>Standard Performer</b>	<b>16</b>	<b>25</b>

## II. Public Housing Updates

### A. Tenant Repayment Agreement

As previously reported, the Housing Authority has implemented tenant repayment agreements for residents with past due balances now that the COVID relief funding is no longer available. As the balances are paid down this will improve our MASS score for the Tenant Account Receivable (TAR).

### B. Staff Training

All property management staff have received customer service training, providing them with the skills necessary to enhance tenant satisfaction, resolve conflicts effectively, and maintain positive communication.

Furthermore, all members of the property management team are undergoing ACOP (Admission and Continued Occupancy Policy) training. This ensures a comprehensive understanding of the policy, leading to better compliance with regulations, fair treatment of tenants, and effective communication in line with occupancy guidelines.



## Memorandum

**To:** Board of Commissioners, Housing Authority of St. Louis County

**Through:** Shannon Koenig, Executive Director and CEO

**From:** William Barry, Director of Maintenance and Facilities

**Date:** January 9, 2024

**Subject:** *Maintenance Report*

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This memo summarizes the monthly maintenance and supply costs for the Housing Authority of St. Louis County Public Housing from November 1 through December 31, 2023.

**I. Maintenance Supply Costs**

The following are repair and replacement supply costs for janitorial supplies, electrical, door repair, plumbing, appliance, and heating cooling repairs to ensure the units meet Housing Quality Standards.

November	\$ 22,474
<u>December</u>	<u>\$ 18,624</u>
<b>TOTAL</b>	<b>\$ 41,098</b>

**A. Attachment:** Work Orders from November - December 2023.

**II. Contracted Repair Costs**

These costs include groundskeeping, pest control, janitorial and alarm monitoring, four-unit rehabs, trash services, heating and cooling systems replacement, carpet replacement, bathtub resurfacing, and electrical and plumbing contractor services.

November	\$ 87,084
<u>December</u>	<u>\$ 44,719</u>
<b>TOTAL</b>	<b>\$ 131,803</b>

**III. Other Maintenance Costs**

These costs include vehicle maintenance and vehicle fuel costs.

November	\$ 1,323
<u>December</u>	<u>\$ 5,493</u>
<b>TOTAL</b>	<b>\$ 6,816</b>





### Work Order Detail

Arbor Hill, Fee Fee Manor, Villa Lago, and Single-Family Homes  
Work Orders active between 11/01/2023 and 12/31/2023

Unit	WO	WO Category	WO Brief Description	Call Date	Date Completed	Days to Complete	Days open in Period Reported
APP177	36470	Doors	Front screen door handle fell	10/27/2023	11/13/2023	17	12
APP185	36474	HVAC	Needing someone to turn off	10/27/2023	11/13/2023	17	12
APP177	36571	Doors	storm door	11/07/2023	11/13/2023	6	6
APP153	36577	Doors	glass door	11/07/2023	11/07/2023	1	1
APP181	36607	Electrical	fluorescent light	11/13/2023	11/13/2023	1	1
APP185	36608	Plumbing	water faucet	11/13/2023	11/13/2023	1	1
APP155	36900	Appliance	light in refrigerator	11/21/2023	11/29/2023	8	8
A14732	36910	Doors	cabinet door	11/22/2023	11/27/2023	5	5
A14522	36960	HVAC	Blowing out cold air.	12/01/2023	12/07/2023	6	6
PLU139	37001	Doors	mailbox key	12/07/2023	12/11/2023	4	4
FF170F	36380		screen door	10/16/2023	11/05/2023	20	5
FF194C	36516		washer	11/01/2023	11/06/2023	5	5
FF170E	36611	Electrical	ceiling out	11/13/2023	11/16/2023	3	3
FF166A	36615	Plumbing	toilet seat	11/13/2023	11/15/2023	2	2
FFBLDG4	36719	Appliance	washer machine	11/14/2023	11/15/2023	1	1
FF170B	36832	Doors	safety bar	11/15/2023	11/21/2023	6	6
FFBLDG2	36857	Electrical	Building 178,194 and 190	11/16/2023	11/20/2023	4	4
FFBLDG2	36874	Appliance	washer machine	11/20/2023	11/20/2023	1	1
FF166H	36885	Windows	vertical blinds	11/20/2023	11/28/2023	8	8
FF170E	36890	HVAC	filter/HVAC	11/21/2023	11/21/2023	1	1
FF166E	36903	Doors	sliding door	11/21/2023	12/12/2023	21	21
FF186A	36937	Electrical	wall socket	11/28/2023	11/29/2023	1	1
FF178B	36941	Walls-Ceilings	tiles on walls	11/29/2023	12/13/2023	14	14
FF182A	36942	Electrical	fans	11/29/2023	12/12/2023	13	13
FFBLDG4	36954	Electrical	hallway light	11/30/2023	12/12/2023	12	12
FF190D	36973	Electrical	light bulbs with cover	12/04/2023	12/12/2023	8	8
FF162G	37026	Plumbing	kitchen faucet	12/12/2023	12/17/2023	5	5
FF166C	37032	Electrical	Light Bulb	12/14/2023		6	6
VD1533	36258	Plumbing	toilet paper roll/toothbrush h	09/29/2023	11/14/2023	46	13
	36332		LAUNDRY ROOMS	10/09/2023	11/09/2023	31	8
V12355	36402	Plumbing	bathtub	10/17/2023	11/21/2023	35	20
	36484		laundry room	10/30/2023	11/09/2023	10	8
VD1516	36498	Electrical	kitchen/tub	10/31/2023	11/17/2023	17	16
VD1515	36606	Electrical	doorbell	11/13/2023	11/27/2023	14	14
VD1529	36862	Doors	door handle	11/16/2023	11/17/2023	1	1
VD1567	36863	Plumbing	knob on bathtub	11/17/2023	11/22/2023	5	5
VD1534	36892	Plumbing	low presurre	11/21/2023	11/22/2023	1	1
V12254	36966	Doors	doors/blinds/bathroom	12/04/2023	12/17/2023	13	13
VD1514	36990	Doors	storm door	12/06/2023	12/18/2023	12	12
VD1549	36991	Plumbing	tissue holder	12/06/2023	12/11/2023	5	5
VD1520	36999	General	sink stopper	12/07/2023	12/13/2023	6	6
V12352	37003	HVAC	filter	12/07/2023	12/11/2023	4	4
V12286	37034	Electrical	outlet	12/14/2023	12/18/2023	4	4
VD1535	37052	Plumbing	water pressure	12/18/2023	12/18/2023	1	1
V12364	37062	Doors	knob on storm	12/19/2023		2	2
WS1455	36325	Electrical	Light fixture in sin's room.	10/09/2023	11/01/2023	23	1
EL1460	36377	Doors	Front screen door is scratchin	10/16/2023	11/01/2023	16	1
ER9910	36424	General	Pieces of tile falling apart in sh	10/19/2023	11/01/2023	13	1
ER9910	36425	Walls-Ceilings	Never filled hole in wall outsi	10/19/2023	11/01/2023	13	1
WP2862	36443	General	Baseboards are coming apart	10/24/2023	11/02/2023	9	1
WS1486	36466	General	Needing a rail installed for tuk	10/27/2023	11/01/2023	5	1
WS1486	36467	Flooring-Steps	Peices of floor tile is missing ir	10/27/2023	11/03/2023	7	2
WS1422	36471	Doors	Front screen door closer is br	10/27/2023	11/08/2023	12	7
WS1422	36472	General	When using the shower water	10/27/2023	11/02/2023	6	2
WS1422	36473	Electrical	Brought some smoke detecto	10/27/2023	11/07/2023	11	6
WP2812	36475		kitchen sink clogged	10/30/2023	11/02/2023	3	1
WP2803	36479	HVAC	No heat	10/30/2023	11/02/2023	3	1
E11125	36505	Plumbing	Water leaking under the kitch	10/31/2023	11/01/2023	1	1
CHI336	36509	General	Re-caulk around the tub.	10/31/2023	11/08/2023	8	7
E11124	36514		Kitchen sink clogged	11/01/2023	11/02/2023	1	1

E11112	36524		Fridge not working	11/01/2023	11/03/2023	2	2
NEW404	36532	General	No poll for closet	11/02/2023	11/10/2023	8	8
NEW404	36533	General	When using the shower, wate	11/02/2023	11/10/2023	8	8
NEW404	36534	Walls-Ceilings	Paint chipping	11/02/2023	11/10/2023	8	8
NEW404	36535	Doors	Son's room, bedroom door w	11/02/2023	11/10/2023	8	8
NEW404	36536	Electrical	Outlets in son's bedroom not	11/02/2023	11/10/2023	8	8
NEW404	36537	Doors	Back door step	11/02/2023	11/10/2023	8	8
NEW404	36538	Windows	Hole in window seal	11/02/2023	11/10/2023	8	8
WP2819	36551	Appliance	Refrigerator is not cooling	11/03/2023	11/09/2023	6	6
WP2808	36554	Doors	Front screen door is not closir	11/06/2023	11/10/2023	4	4
WP2873	36570		Toilet clogged	11/07/2023	11/07/2023	1	1
EN7641	36573		Is looking for a new stove.	11/07/2023	12/01/2023	24	24
EN7641	36574		mold in bathroom ceiling	11/07/2023	11/10/2023	3	3
E11109	36581	General	Recaulk around bathroom	11/07/2023	11/20/2023	13	13
E11109	36582	Doors	Closey doors off track	11/07/2023	11/17/2023	10	10
E11109	36583	Walls-Ceilings	Holes in wall near refrigerator	11/07/2023	11/17/2023	10	10
WP2808	36590	Electrical	Needing bulb for ceiling fan	11/09/2023	11/14/2023	5	5
WP2819	36594	Appliance	Refrigeratoris making a loud r	11/09/2023	11/21/2023	12	12
WP2808	36602		Weather stripping on back do	11/13/2023	11/17/2023	4	4
WP2808	36609		Nail crown molding back to w	11/13/2023	11/14/2023	1	1
MP2802	36612	Plumbing	Faucet leaking.	11/13/2023	11/14/2023	1	1
MP2802	36613	HVAC	Not warming up	11/13/2023	11/14/2023	1	1
MP2802	36614	Doors	Back door lock is not secure	11/13/2023	11/14/2023	1	1
EL1436	36617	Appliance	Oven is not working	11/13/2023	11/20/2023	7	7
BRO705	36718	Doors	Front screen door closer	11/14/2023	11/23/2023	9	9
SAR321	36830	Electrical	Outlets in livingroom is not w	11/15/2023	11/23/2023	8	8
U10124	36831	HVAC	No hot water in unit.	11/15/2023	11/21/2023	6	6
WP2889	36876	Flooring-Steps	Water is coming from the und	11/20/2023	11/21/2023	1	1
WP2889	36877	General	Water dripping from the exha	11/20/2023	11/21/2023	1	1
WP2889	36878	Appliance	Making noise	11/20/2023	11/21/2023	1	1
WS1479	36901	Building Exteri	Squirrel in roof.	11/21/2023	11/28/2023	7	7
WP2869	36904	Appliance	Faulty oven igniter	11/21/2023	11/22/2023	1	1
WP2869	36905	Appliance	Faulty oven igniter	11/21/2023	11/22/2023	1	1
WP2835	36906	Electrical	Fuel box	11/21/2023	11/28/2023	7	7
WP2893	36925	HVAC	Cold air.	11/27/2023	11/28/2023	1	1
SAR321	36931	Electrical	Outlets in livingroom is out	11/28/2023	11/28/2023	1	1
WS1431	36932	General	Check for mold in bathroom	11/28/2023	11/28/2023	1	1
CHI316	36935	HVAC	No heat	11/28/2023	11/28/2023	1	1
WP2808	36939	Plumbing	Kitchen sink leaking	11/29/2023	11/29/2023	1	1
WP2816	36959	General	Replace tub stopperR	12/01/2023	12/04/2023	3	3
EL1460	36976	Appliance	Replace rubber around the dc	12/04/2023	12/12/2023	8	8
CHI340	36983		Stove wont turn off	12/05/2023	12/12/2023	7	7
CHI340	36984		Garage door not functioning	12/05/2023	12/08/2023	3	3
WP2869	37012	HVAC	No heat	12/11/2023	12/11/2023	1	1
WP2869	37013	General	Exhaust fan fell	12/11/2023	12/13/2023	2	2
WP2869	37014	Electrical	Light bulb above her sink.	12/11/2023	12/11/2023	1	1
WP2869	37015	Appliance	Replace light please	12/11/2023	12/11/2023	1	1
WP2862	37016	Appliance	Oven not coming on.	12/11/2023	12/12/2023	1	1
WS1438	37023	HVAC	No heat	12/12/2023	12/12/2023	1	1
E11128	37027	HVAC	Furance is not coming on	12/12/2023	12/12/2023	1	1
ER9910	37035	Electrical	Smoke detector and carbon n	12/14/2023	12/15/2023	1	1
ATT432	37036	Plumbing	Leaking under kitchen sink	12/14/2023	12/18/2023	4	4
WP2857	37040	Electrical	Smoke detector and carbon n	12/15/2023	12/18/2023	3	3
WP2865	37048	HVAC	Not staying warm	12/18/2023	12/18/2023	1	1
E11108	37050	Doors	Door knob is off	12/18/2023	12/18/2023	1	1
E11108	37051	Plumbing	Hall bathroom sink is stopped	12/18/2023	12/18/2023	1	1
ALK320	37053	Flooring-Steps	Repair floor tile	12/19/2023		2	2
WP2816	37061	HVAC	Blowing cold air.	12/19/2023	12/19/2023	1	1
EL1492	37063	General	Toilet handle in hall bathroom	12/19/2023	12/19/2023	1	1

119

Total number of work orders:	119
Average completion days:	6.61
Average completion days for reporting period 2 years prior:	3.00
Reduction in average completion days over the past three ye	-3.61



## Memorandum

**To:** Board of Commissioners, Housing Authority of St. Louis County

**Through:** Shannon Koenig, Executive Director and CEO

**From:** Kurt Schulte, Development Coordinator

**Date:** January 9, 2024

**Subject:** *Development Report*

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This memo provides an overview of the current development activities of the Housing Authority of St. Louis County as well as future development plans.

### I. Recommendation

No Board action is required.

### II. Discussion

#### A. Wellington Family Homes

- i. The project is underway and construction is progressing on schedule. First units are online.
- ii. Management staff continue the qualifying process for residents and notifications of former Wellston Housing Authority residents about right to return.
- iii. Bi-weekly calls continue with the Housing Authority of St. Louis County ("The Authority") and the development team to ensure construction remains on schedule.

#### B. Arbor Hill Apartments Redevelopment

- i. The Authority and the development have made significant progress with the RAD and HUD loan process.
- ii. Final plans for the off-site detention area have been completed and are being priced.
- iii. The Authority is pushing to get this closed by the end of Q1 2024.

## A. Future Development Plans

- i. The Authority was approached by St. Louis County to assist with a transitional housing project on the site of the Weinman Center. The Authority submitted an application for 51 LIHTC-assisted units at the site and will act as the developer and owner of the project. The application for 4% LIHTC was submitted on September 22<sup>nd</sup>. While the application scored very highly with 133 points, the application was not chosen by MHDC.
- ii. The Authority was approached by the Peace United Church of Christ to examine the possibility of locating affordable housing on their property in Webster Groves. After studying the property, assessing market demand and meeting with local leaders and stakeholders, the Authority decided to team up with Peace and act as co-developer and co-owner of a 52-unit, LIHTC-assisted senior housing development. The application for 9% LIHTC was submitted on September 22<sup>nd</sup>. This application also scored well but was not selected for funding this year.
- iii. It is fairly typical, due to the highly competitive environment, for a project to take more than one submission in order to be funded. In 2023, only 29 applications for 4% and 9% credits were funded, which is lower than average.

## Memorandum



**To:** Board of Commissioners, Housing Authority of St. Louis County

**Through:** Shannon Koenig, Executive Director and CEO

**From:** Anna Holyan, Director of Strategic Initiatives

**Date:** January 9, 2024

**Subject:** *Customer Service Survey Report*

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This memo provides an overview of the accompanying *Customer Service Survey Report* for 2023.

### I. Overview

Staff deployed the second annual customer service survey to Housing Choice Voucher (HCV) residents, public housing residents, and landlords. The 2023 survey includes a mix of questions asked last year to measure progress over time, but also introduces new questions to begin measuring. New questions are denoted in the report with a "New!" button. Positive or negative, these results provide important data to staff on whether specific interventions are working.

### II. What Do These Results Tell Us?

#### A. Overall Response Rate is Down from 2022

The response rate for public housing and Housing Choice Voucher residents was much lower than last year, despite drawing the same number of individuals for the random sample. This suggests that any conclusions drawn from this data may not represent the view of the entire HCV or public housing resident population.

#### B. Overall Resident Satisfaction is Down

Overall, scores show that Housing Choice Voucher (HCV) and public housing residents are less satisfied with the housing authority than last year. This reflects operational changes meant to improve customer service over the past year.

In the HCV department, this has meant managing turnover and the constant flow of inbound phone calls by giving caseworkers the ability to manage their time and caseloads better through the implementation of call blocks. These call blocks establish set times of the day when caseworkers return phone calls. Overall, the results suggest that interventions that interfere with a resident's ability to speak to the appropriate staff member immediately have a negative impact on customer satisfaction.

In public housing, 2023 was largely a foundational year as we brought property management back in-house and worked diligently to make quality hires in the maintenance department. The resident feedback reflected the impact of this change and the corresponding delays in service delivery.

### **C. Landlords are Relatively Satisfied Compared to 2022**

There was an increase in satisfaction on three indicators for landlords. A larger proportion of landlords either agree or strongly agree with the following statements:

- "I understand and feel comfortable with the expectations of my biannual property inspection."
- "I have generally had a good experience with leasing to housing authority residents."
- "Staff at the housing authority have the necessary knowledge to assist me with my questions."

### **III. What Now?**

These results provide us valuable data on our customers' sentiments and what works for them and what does not. The past year has been one of capacity-building and training. All staff have now received two trainings on understanding our residents and how to provide great customer service to them. We will take this feedback and the momentum we have built in 2023 to continue to adjust the way we communicate with our residents.

Staff are already addressing two of the major themes of the survey feedback: that our existing communications are not working and that our residents want direct access to speak with staff. To the first point, staff are working to roll out a new website with helpful information that can be used as a resource for residents, staff, and partners. Additionally, through the implementation of the 2024 communications plan, staff will be communicating more regularly with residents through varied channels.

To provide direct access to staff, we have hired two Housing Choice Voucher Generalists whose sole responsibility will be to answer resident questions relating to the HCV program and relieve the pressure on the caseworkers. Organization-wide, we instituted a new phone tree system to help callers route to the correct contact and gave out direct numbers for our different public housing leasing office locations. To further increase access to staff, we will be opening the lobby doors for walk-ins starting January 30<sup>th</sup>, whereas we were previously open by appointment only.

In addition to the internal process changes we will work on in 2024, staff will also consider the low response rate from this iteration of the survey. Next year, we will work with our communications consultant to craft more messaging and create a campaign around the survey to ensure a more representative sample.

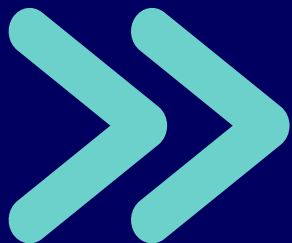
### **IV. Attachments**

Customer Service Survey Report, 2023



Housing Authority of St. Louis County

# Customer Service Survey Results



2023




# Survey Overview

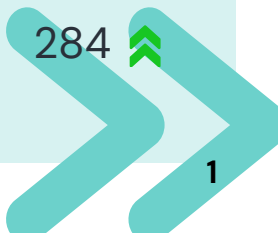
In October, 2023 staff distributed the second annual customer service surveys to the following customer groups:

- Public Housing Residents
- Housing Choice Voucher Residents
- Property Owners

The 2022 survey focused on defining what great customer service meant to our customers. Responses centered on the need for proactive communication as well as treating customers with empathy and understanding.

The 2023 survey measured overall satisfaction with major processes and customer-facing roles. With a working definition of how our customers define great customer service, open-ended questions on this year's survey were limited to how the housing authority could better serve its customers.


SURVEY	SURVEYS SENT 2022	SURVEYS RECEIVED 2022	SURVEYS SENT 2023	SURVEYS RECEIVED 2023
Public Housing Survey	297	83	297	42 
Housing Choice Voucher Survey	1,000	313	1,000	199 
Property Owner Survey	1,000	255	1,000	284 





# Public Housing Survey Results

Public housing residents were asked to rate their satisfaction with the following interactions with **property management staff** on a scale of 0 to 5, with 5 being very satisfied:

53% 

The way property management staff treated and spoke to you in the past year.

Of the 15 individuals who responded to this question, 53% indicated that they were **either satisfied or very satisfied** with the way they were treated and spoken to by property management staff within the past year. In 2022, 71% of 83 respondents said the same.

25% 

Property management staff's timeliness in returning your phone calls.

Of the 20 individuals who responded to this question, 25% indicated that they were **either satisfied or very satisfied** with property management staff's timeliness in returning their phone calls. In 2022, 76% of 83 respondents said the same.

40% 

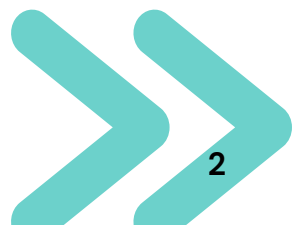
Staff's responsiveness to questions and concerns.

Of the 23 individuals who responded to this question, 40% said they were **either satisfied or very satisfied** with staff's responsiveness to questions and concerns. In 2022, 76% of 83 respondents said the same.

53% 

Property management staff's notification of your annual income recertification.

Of the 30 responses to this question, 53% of individuals selected that they were **either satisfied or very satisfied** with property management staff's notification of their annual income recertification.



# Public Housing Survey Results

Public housing residents were asked to rate their satisfaction with the following interactions with **maintenance staff** on a scale of 0 to 5, with 5 being very satisfied:

69% 

The way maintenance staff treated and spoke to you in the past year.

Of the 29 individuals who responded to this question, 69% indicated that they were **either satisfied or very satisfied** with the way they were treated and spoken to by maintenance staff within the past year.

39% 

The communication from the PHA regarding the scheduling and completion of maintenance tasks.

Of the 18 individuals who responded to this question, 39% indicated that they were **either satisfied or very satisfied** with the communication from the PHA regarding the scheduling and completion of maintenance requests.

13% 

The time it took for maintenance to respond to your request.

Of the 15 individuals who responded to this question, 13% said they were **either satisfied or very satisfied** with the time it took for maintenance to respond to their request.

19% 

The overall quality of repairs made to your home.

Of the 27 responses to this question, 19% of individuals selected that they were **either satisfied or very satisfied** with the overall quality of repairs made to their home.



# HCV Survey Results

Housing Choice Voucher residents were asked to rate their satisfaction with the following interactions with their **caseworker** on a scale of 0 to 5, with 5 being very satisfied:

61% 

The way you were treated and spoken to by staff.

Of the 199 individuals who responded to this question, 61% indicated that they were **either satisfied or very satisfied** with the way they were treated and spoken to by Housing Authority staff within the past year. In 2022, 75% of 309 respondents said the same.

45% 

Staff's timeliness in returning your phone calls.

Of the 199 individuals who responded to this question, 45% indicated that they were **either satisfied or very satisfied** with staff's timeliness in returning their phone calls. In 2022, 63% of 309 respondents said the same.

55% 


Staff's responsiveness to your questions and concerns.

Of the 196 individuals who responded to this question, 55% indicated they were **either satisfied or very satisfied** with staff's responsiveness to questions and concerns about their rent. In 2022, 72% of 309 respondents said the same.



# HCV Survey Results

Housing Choice Voucher residents were asked to rate their satisfaction with the following interactions with the **inspections department** on a scale of 0 to 5, with 5 being very satisfied:

65% 

The way you were notified about your scheduled inspection.

Of the 196 individuals who responded to this question, 65% indicated that they were **either satisfied or very satisfied** with the way they were notified of an upcoming inspection. In 2022, 67% of 306 respondents said the same.

45% 

The way you were treated by staff conducting the inspection.

Of the 199 individuals who responded to this question, 45% indicated that they were **either satisfied or very satisfied** with staff's timeliness in returning their phone calls. In 2022, 75% of 308 respondents said the same.



# Landlord Survey Results

Landlords were asked the following questions about their experience with the Housing Authority of St. Louis County:

41% 

The process to become a landlord with the housing authority has been simple and understandable.

Of the 209 individuals who responded to this question, 41% indicated that they **either strongly agree or agree** that the process to become a landlord with the housing authority has been simple and understandable. In 2022, 46% of 255 respondents said the same.

62% 

I understand and feel comfortable with the expectations of my biannual property inspection.

Of the 208 individuals who responded to this question, 62% selected that they **either strongly agree or agree** with understanding and feeling comfortable with the expectations of their biannual property inspection. In 2022, 49% of 253 respondents said the same.

48% 

I have generally had a good experience with leasing to housing authority residents.

Of the 209 individuals who responded to this question, 48% said they **either strongly agree or agree** that they have generally had a good experience leasing to housing authority residents. In 2022, 47% of 253 respondents said the same.

43% 

Staff at the housing authority have the necessary knowledge to assist me with my questions.

Of the 208 individuals who responded to this question, 43% said they **either strongly agree or agree** that housing authority staff have the necessary knowledge to assist them with their questions. In 2022, 42% of 253 respondents said the same.

22% 

Staff at the housing authority are always available to answer my questions.

Of the 209 individuals who responded to this question, 22% said they **either strongly agree or agree** that housing authority staff are always available to answer their questions. In 2022, 24% of 254 respondents said the same.



# Landlord Survey Results

Landlords were asked the following questions about their experience with the Housing Authority of St. Louis County:

47% 

I would recommend becoming a Housing Choice Voucher landlord to other landlords.

Of the 209 individuals who responded to this question, 47% said they **either strongly agree or agree** that they would recommend becoming a Housing Choice Voucher landlord to other landlords. In 2022, 53% of 254 respondents said the same.

56% 

There are a lot of misconceptions about low-income housing.

Of the 209 individuals who responded to this question, 56% said they **either strongly agree or agree** there are a lot of misconceptions about low-income housing. In 2022, 57% of 254 respondents said the same.



# Public Housing Open-Ended Responses

Staff asked public housing residents what improvements or changes they would suggest to enhance the overall experience with both property management and maintenance staff. Below are some responses pulled from the survey.

What improvements or changes would you suggest to enhance the overall experience with **property management** staff?

Total responses to this question: 36

- "Communication skills and professionalism."
- "They should be friendlier AND advocate FOR residents, not just put up with them."
- "Show more concern about replacing things that are broken."
- "Provide consistent communication with updates and reminders on changes that are relevant to residents and the units they occupy. Utilize a variety of communication channels more frequently."
- "I want to be able to reach the leasing office directly."
- "Better phone system and communication."
- "Hiring more maintenance staff would improve everything overall."

What improvements or changes would you suggest to enhance the overall experience with **maintenance** staff?

Total responses to this question: 36

- "Maintenance is very slow to respond, but does decent work. I had to move my refrigerator to the bedroom for three days when the wall outlets stopped working. My kitchen light was out for about two months before repair. You get my point here!"
- "They can do a better job at coming out to fix the problems instead of bringing pieces to do a temporary repair."
- "Implement a system that will keep residents updated on the progress of their maintenance issues."
- "Something needs to be done about maintenance being inside of our homes without our knowledge or permission."
- "It seems like they need more staff and help. They are always pleasant and ready to help."
- "I know there are not many, so maybe hire more maintenance staff."
- "When you start something, come back and finish it."

# HCV Open-Ended Responses

Staff asked Housing Choice Voucher residents how the housing authority could better serve its customers and offered a space for any other thoughts. Below are some responses pulled from the survey.

The housing authority would better serve its customers if...

Total responses to this question: 150

- "I'm very satisfied with the service from my caseworker, Ms. Kimberly Campbell and the staff at the agency."
- "I wish we could get in-person application help."
- "Things are getting a lot better."
- "We would be alerted to a change in our caseworker."
- "You could get ahold of your caseworker when you call instead of leaving numerous messages before they call you back."
- "Return calls in a timely manner."
- "The housing authority lightened the caseloads of each caseworker to make it more manageable. Responses and accessibility would be more obtainable if they had less cases."
- "Keeping the main line operator more informed on where to direct people."
- "Send surveys out more."
- "More access to housing in better areas like Chesterfield, Kirkwood, Glendale, or Webster Groves so our children can have a better opportunity as far as school districts are concerned."

Please let us know any other thoughts you would like to share.

Total responses to this question: 150

- "Please find a way to provide Section 8 without landlords knowing. They treat us differently and refuse to rent us updated homes."
- "I feel that all workers should be held responsible for responding to concerns of their tenants/clients in a timely manner."
- "I just want better communication and a number that directly goes to my caseworker."
- "Better communication on how the housing process goes for someone who has never received assistance from this program before."
- "I appreciate the Housing Choice Voucher program. Without them, I don't know where I would be."
- "I'm very pleased and appreciative of the assistance I've received and the excellent care and help from my caseworker."
- "I just feel when you have a new caseworker, there should be better communication and it makes you nervous when you don't know if all your information is in when you can't speak to someone and know what's going on. I do love and appreciate my housing and everything that has been done for me!"



# Landlord Open-Ended Responses

Staff asked landlords what would make it easier for property owners to do business with the organization, what types of incentives would motivate more landlords to participate in the HCV program, and solicited any other thoughts they wanted to share.

What would make it easier for landlords to do business with the housing authority?

Total responses to this question: 161

- "More effective communication, including returning calls/emails."
- "Providing contractor referrals for senior landlords."
- "Quicker responses."
- "Representatives need to respond about finance issues quicker."
- "Tenant education classes."
- "Have one specific person for all our needs, not have to speak to numerous people and send numerous emails to get a responses. It's quite frustrating when you leave so many voicemails and emails to the caseworker and do not get a reply."
- "I have been going back and forth with the housing authority for over seven months to have a payment issue resolved. I've been extremely disappointed in the caseworkers' response times and have considered removing myself from the program as a result."

What types of incentives would motivate landlords to participate in the HCV program?

Total responses to this question: 153

- "A smoother process to get responses from the housing authority would be the best incentive ever."
- "Reimbursement for tenant-caused damages."
- "Deposit assistance."
- "How about paying landlords market rate for starters and then providing some kind of reimbursement program when tenants damage their properties. These are two of the main reasons why landlords do not want to participate in the program."
- "A department devoted to the landlords and issues that may arise from paperwork/payments and not have to wait for a caseworker that is overloaded to get back with you."
- "A program or advocate to assist property owners with recouping damages and/or holding tenants accountable when tenant damages exceed the security deposit."
- "A reliable contact for landlords would be the first step. I don't know what other incentives are really necessary."
- "Advocacy. More people on your team with the enthusiasm and zeal of Ms. Tammika Sydnor would be great. The onboarding learning curve for new investors is great. Just a smiling voice when we call with stupid questions is all we ask, and not to have to go from department to department to get answers."

# Landlord Open-Ended Responses

Staff asked landlords what would make it easier for property owners to do business with the organization, what types of incentives would motivate more landlords to participate in the HCV program, and solicited any other thoughts they wanted to share.

Please let us know any other thoughts you would like to share.

Total responses to this question: 161

- “Our organization’s overall experience with the housing authority has been a blessing for our resident’s and we’ve only noticed a lack of communication/follow up within the last six months.”
- “When things are running smoothly, it’s all good. As soon as something is different or not right, it takes SO long to get it resolved which usually results in the owner getting paid late.”
- “The inspections department is the most efficient department to work with, particularly James Richardson and Gerard Brown.”
- “I would like a clear understanding on the move out process.”
- “It is almost impossible to speak with anyone in the inspections department. When you leave a message, it sometimes takes 3-4 days to get a response. Even the tenant gets disgusted by this.”
- “Give landlords an organization chart when they start the program and let them know who to contact for specific issues.”
- “Texting would be a great thing for communication!”



## Memorandum

**To:** Board of Commissioners, Housing Authority of St. Louis County

**Through:** Shannon Koenig, Executive Director and CEO

**From:** Kurt Schulte, Development Consultant

**Date:** January 9, 2024

**Subject:** *Tax Exempt Bond Application - Parkview Place Apartments, Resolution No. 1433*

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This memo provides a recommendation and background information regarding a proposed bond issuance for Parkview Place Apartments. Funds would be used for a portion of the rehabilitation of 156 dwelling units in University City, Missouri.

**I. Recommendation**

Authority staff recommend the Board approve the financing and authorize the Executive Director to deliver a request to the Industrial Development Authority of the County of St. Louis, Missouri ("IDA") to issue tax-exempt bonds in a principal amount of approximately \$19,125,500 to finance a portion of the cost and acquisition of the proposed rehabilitation of the project.

**II. Background**

**A. Cooperation Agreement with the IDA**

There is presently a Cooperation Agreement in place between the Authority and the IDA for the issuance of tax-exempt bond applications.

**B. Bond Application Process**

The Housing Authority of St. Louis County, in partnership with the IDA, can facilitate new issuances of tax-exempt bond applications for the development of multi-family housing in the County. Applications must meet all local building codes and comply with the St. Louis County Office of Community Development's consolidated plan, among other criteria.

**III. Parkview Place Bond Application**

**A. Proposal Overview**

On December 7, 2023, the Authority received a full application (including the required application fee) requesting a tax-exempt bond issuance for \$19,125,500 for the rehabilitation of Parkview Place Apartments located at 701 Westgate in University City.

Parkview Place consists of a 156-unit apartment tower located on a 0.74-acre lot. Originally constructed in 1972, the building consists of 39 efficiency and 117 one-bedroom apartments. The property is 100% supported by a Section 8 HAP Contract.

Current property amenities include onsite leasing, a full-time service coordinator, a business center, community room, fitness center, salon, and on-site laundry. Parking is available onsite for 39 vehicles. The property consists of one parcel of land located off of Westgate Avenue. The property is within walking distance of the Delmar Loop, multiple bus stops, a Link Metro Station, a local grocery store, and multiple restaurants. It is also a short drive to Walgreens, Walmart, St. Mary's Hospital, Forest Park, and Washington University in St. Louis. It is a mere 8-mile drive to St. Louis International Airport and a 17-minute drive to downtown St. Louis.

Several components of the buildings have reached the end of (or exceeded) their useful life and require repair, replacement, or modernization to be brought into compliance with current codes or guidelines. Its renovation is necessary to maintain the area's limited supply of existing quality affordable housing in the primary market. The rehabilitation budget is approximately \$60,000 per unit. The rehabilitation will span several areas, including the current leasing office, a new library, business center, fitness center, and keyfob access.

The property will receive substantial upgrades in site amenities including a new yoga/pilates studio, new library, new game room, new computer workstations, and free WIFI for residents. Building exterior upgrades will include installing new asphalt at the parking area, pressure washing buildings and applying new paint, and elevator modernization. The interior renovation will consist of new appliances, new LED lighting, new low flow toilets, new faucets, new showerheads, WIFI in units, new HVAC systems and converting 5% of units to ADA. Additional items in the rehabilitation will include new signage, a new security camera system, auto gate entry, a new ADA path of travel (sidewalks), upgraded landscaping throughout the property, new site lighting, and a repaved, restriped parking lot.

The property renovation will commence immediately upon the bond closing and will be completed within 12 months thereafter. With the renovation upgrades, the project will provide housing comparable to the new developments in the market area.

Rents are projected to be \$1,035 for the 39 studio units and \$1,260 for the 117 1-bedroom/1 bath units. All units are HAP assisted.

This \$36MM project will be funded with the bonds, federal LIHTC Equity, HTC Equity, deferred developer fee and NOI during construction.

**B. Required Application Attachments**

Enclosed is a copy of the application with the required attachments:

- i. Brief narrative of the proposed development.
- ii. Current financials.
- iii. Construction cost estimates for labor and materials.
- iv. Description of previous participation.
- v. Preliminary Opinion of the Bond Counsel. A letter from Bond Counsel providing an opinion that the project qualified as a "Project: as that term is defined in Section 349.010 R.S.Mo. 1986, as amended.
- vi. Bond Purchase Letter. A preliminary letter of commitment to purchase the bonds when a favorable opinion as to the marketability of the bonds by an established underwriter or financial institution.

RESOLUTION NO. 1433

RECOMMENDING THE FINANCING BY THE INDUSTRIAL  
DEVELOPMENT AUTHORITY OF THE COUNTY OF ST. LOUIS,  
MISSOURI OF THE ACQUISITION AND REHABILITATION OF 156  
DWELLING UNITS

RECITALS:

1. Parkview Place Housing I, LLC, a Missouri limited liability company, has applied to the Housing Authority of St. Louis County, Missouri (the "Authority") to recommend issuance by the Industrial Development Authority of the County of St. Louis of tax-exempt revenue bonds in a principal amount not to exceed \$19,125,500 to finance a portion of the costs of the acquisition and rehabilitation of 156 dwelling units, located at 701 Westgate in University City, St. Louis County, Missouri (the "Project").

2. All of the available rental dwelling units in the Project will be rented to persons and families of low and moderate income.

3. The Project will promote the economic welfare and the development of St. Louis County, Missouri, and will be in furtherance of the public purposes set forth in Chapter 349, RSMo.

NOW, THEREFORE, BE IT RESOLVED BY THE COMMISSIONERS OF THE HOUSING AUTHORITY OF ST. LOUIS COUNTY, MISSOURI, AS FOLLOWS:

**Section 1.** The Authority approves the Project for financing and authorizes and directs the Executive Director of the Authority to execute and deliver to The Industrial Development Authority of the County of St. Louis, Missouri (the "IDA") a request to issue tax exempt revenue bonds, in a principal amount not to exceed \$19,125,500 to finance a portion of the costs of the acquisition and rehabilitation of the Project. The Executive Director is authorized to deliver a letter of final approval to the IDA provided (i) the bonds are rated at least "AA" or equivalent by a national credit rating service, such as Standard & Poor's Ratings Services, a Standard & Poor's Financial Services LLC business, or Moody's Investors Service, or our privately placed, and (ii) final financing documents are in acceptable form as determined by the Executive Director, and provided (iii) that there shall be no liability on the part of the Authority, the IDA, or St. Louis County with respect to the bonds or their repayment (other than the IDA to the limited extent provided in a trust indenture or other agreement under which the bonds are issued).

**Section 2. Further Authority.** The Authority shall, and the officers, agents and employees of the Authority are hereby authorized and directed to, take such further action, and execute such other documents, certificates and instruments, as may be necessary or desirable to carry out and comply with the intent of this Resolution.

**Section 3. Effective Date.** This Resolution shall take effect immediately upon its adoption.

Approved by the Commissioners of the Housing Authority of St. Louis County, Missouri this 9<sup>th</sup> day of January 2024.

\_\_\_\_\_  
Chairman

(SEAL)

Attest:

\_\_\_\_\_  
Secretary

**HOUSING AUTHORITY OF ST. LOUIS COUNTY**  
**8865 NATURAL BRIDGE ROAD ST. LOUIS, MO 63121**

*(314) 428-3200*

## Tax Exempt Bond Application

**I. BORROWER INFORMATION**

A. Borrower\* Parkview Place Housing I, LLC Contact Person Mike Arman  
 Address 1600 Rosecrans Avenue, Media Center, 4th Floor Phone (310) 321-7862  
 City Manhattan Beach State CA Zip Code 90266  
 Email Address mike@sdghousing.com Alt. Phone \_\_\_\_\_  
 Federal ID No. 92-1112750 Referred by \_\_\_\_\_

B. Is the Borrower a: \_\_\_\_\_ corp. \_\_\_\_\_ ptrshp. \_\_\_\_\_ individuals  \_\_\_\_\_ LLC  
 Referred by \_\_\_\_\_

C. Name of each owner	% owner	Name of each owner	% owner
<u>Richard Siebert, Manager</u>	<u>100%</u>	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

D. State the general nature of the Borrower's business. \_\_\_\_\_  
 \_\_\_\_\_  
 The borrower is a real estate developer focused on the preservation and rehabilitation of affordable housing. Richard Siebert, the manager of the borrower, has overseen over \$400M of real estate transactions and the renovation/development of over 2,000 residential units.  
 \_\_\_\_\_  
 \_\_\_\_\_

\*Legal name of borrowing entity for this project.

**II. PROJECT INFORMATION**

A. Project Costs

Acquisition	\$ <u>17,750,000</u>
Site Development	\$ _____
New Construction	\$ _____
Rehabilitation	\$ <u>8,595,610</u>
Development Soft Costs	\$ <u>\$1,187,643</u>
Relocation	\$ <u>156,000</u>
FFE/Lease-Up	\$ _____
Contingency(s)	\$ <u>919,146</u>
Reserves	\$ <u>548,878</u>
Financing Costs	\$ <u>4,569,755</u>
Developer Fee	\$ <u>2,582,500</u>
_____	\$ _____
<b>Total Project Uses</b>	<b>\$ <u>36,189,532</u></b>

Project Sources

Bond Issue Amount	\$ <u>19,125,500</u>
HOME/CDBG	\$ _____
LIHTC Equity	\$ <u>13,179,262</u>
Owner Equity	\$ _____
Other <u>Historic TC</u>	\$ <u>2,000,000</u>
NOI During Construction	\$ <u>1,144,520</u>
Deferred Developer Fee	\$ <u>2,582,500</u>
<b>Total Sources</b>	<b>\$ <u>38,031,782</u></b>

B. Project Address: 701 Westgate Avenue, University City, MO 63130

Current # of Units 156 Projected # of Units 156

Current Bedroom Distribution (0br) 39 (1br) 117 (2br) \_\_\_\_\_ (3br) \_\_\_\_\_ (4br) \_\_\_\_\_ (5br) \_\_\_\_\_

Projected Bedroom Distribution (0br) 39 (1br) 117 (2br) \_\_\_\_\_ (3br) \_\_\_\_\_ (4br) \_\_\_\_\_ (5br) \_\_\_\_\_

Current Rents (0br) 955 (1br) 1084 (2br) \_\_\_\_\_ (3br) \_\_\_\_\_ (4br) \_\_\_\_\_ (5br) \_\_\_\_\_ 1 BR HAP 1130

Projected Rents (0br) 1035 (1br) 1260 (2br) \_\_\_\_\_ (3br) \_\_\_\_\_ (4br) \_\_\_\_\_ (5br) \_\_\_\_\_ 1 BR HAP 1340

Site Size/Density 3.20 Acres

C. Census Tract: 2161.01

D. School District University City School District

E. Is the project located within the corporate limits of a St. Louis County municipality? Yes

If yes, which municipality? University City

Has that municipality approved the project? In process

If no, when do you plan to obtain municipal approval? December 2023/January 2024

F. Please describe form of site control (fee simple title, long term lease, option, contract to purchase, other)  
 The borrower is currently under contract to purchase the property with an anticipated ownership date of 12/18/23.



G. Is the proposed site properly zoned? Yes  
If not briefly describe what changes will be needed to obtain proper zoning, and the status of the changes.

C. Briefly describe the economic impact this project will have on the St. Louis area economy, including the number of jobs created or retained.  
Approximately 50 jobs temporary and permanent will be created through the rehabilitation of the existing building. Local vendors will be utilized to the greatest extent possible during construction and the project will continue to support low-income seniors in the University City as a result of the preservation and renovation of the project.

D. Provide required attachments.

### III. PROJECT FINANCING

A. Please provide target dates on the follow:

1. Issue the bonds July 1, 2024
2. Begin the project Immediately upon tax credit closing, estimated state date of July 1, 2024
3. Complete the project July 1, 2025

B. Regarding the placement of the bonds, will there be a private placement x or public issuance \_\_\_\_\_?  
(Check one.)

C. Do you anticipate credit enhancement for the bonds? Yes \_\_\_\_\_ No x

If yes, provide the name, address, telephone number, and contact for the credit enhancer: \_\_\_\_\_  
\_\_\_\_\_

D. Will the bonds be rated? N/A If so, by which rating agency \_\_\_\_\_

What is the projected rating? \_\_\_\_\_

E. Bond Purchaser To Be Determined  
Firm name \_\_\_\_\_ Contact Person \_\_\_\_\_ Phone \_\_\_\_\_

F. Are you seeking companion Federal and/or State Low Income Housing Tax Credits Yes

G. What is the total projected federal equity? \$15,179,262

H. What is the total projected state equity? NA

I. Federal equity partner Raymond James

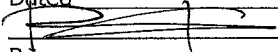
J. State equity partner NA

**IV. MISCELLANEOUS INFORMATION**

Bond Counsel	<u>Gilmore &amp; Bell, P.C.</u>	<u>Weylin Watson</u>	<u>816-218-7566</u>
	Firm Name	Contact Person	Phone
Borrower Counsel	<u>Bocarsly Emden</u>	<u>Kyle Arndt</u>	<u>213-239-8048</u>
	Firm Name	Contact Person	Phone

The undersigned acknowledges receipt of the Authority's current Schedule of Charges for Bond-Related Services and hereby agrees to pay all such fees and expenses in an amount and such time as stipulated therein.

Dated \_\_\_\_\_, 200\_

  
\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Borrower's Representative - Name and Title

Applications should be filed with:

HOUSING AUTHORITY OF ST. LOUIS COUNTY  
8865 Natural Bridge Road  
St. Louis, MO 63121

NOTE: A complete fee schedule is attached.

\*\*This is preliminary estimate.

### HASLC Exhibit A

LABOR – MATERIALS	ESTIMATE	REMARKS
1. Plans & Specifications	240,000	
2. Permits/Building	80,000	
3. Site Improvements	226,500	
4. Demolition & Hauling	351,000	
5. Masonry	459,350	Tuck Pointing & Cleaning
6. Rough Carpentry Materials	109,200	
7. Carpentry Labor	59,258	
8. Common Labor - Clean Up	39,860	
9. Roofing	19,830	New Roof for awning
10. Brickwork and/or Stone Work		
11. Outside Sheet Metal	33,785	Fix Failed Steel Railings & Awning
12. Concrete	15,500	
13. Plumbing	499,500	
14. Electrical Wiring	275,000	
15. Electrical Fixtures	629,200	
16. Heating & Air Conditioning	311,200	
17. Insulation		
18. Drywall & Plaster	57,716	
19. Millwork - Doors - Trim	112,000	
20. Storm Windows & Doors	362,899	
21. Painting & Decorating	511,340	
22. Hardwood Floors/Refinished	775,764	
23. Ceramic Tile-Slate or Marbled		
24. Resilient Tile	80,000	
25. Finished Hardware	156,210	
26. Kitchen Cabinets	590,245	
27. Kitchen Appliances	235,500	
28. Medicine Cabinets & Mirrors	93,000	
29. Miscellaneous Expense	494,694	Mailboxes, signage, toilet accessories, Tub Upgrades
30. Temporary Utilities		
31. Survey (Spot)		
32. Insurance	74,100	
33. Elevator	84,574	
34. Acoustical	35,900	
35. Waterproofing	62,600	
36. Drywall	665,575	
37. Blinds	62,800	
38. Overhead & Supervision	592,801	
39. Profit	444,608	
<b>TOTALS</b>	<b>8,841,509</b>	

# GILMORE BELL

2405 Grand Boulevard, Suite 1100  
Kansas City, Missouri 64108-2521

(816) 221-1000 / (816) 221-1018 FAX / gilmorebell.com

November 29, 2023

Housing Authority of St. Louis County  
8865 Natural Bridge Road  
St. Louis, Missouri 63121

The Industrial Development Authority  
of the County of St. Louis, Missouri  
7733 Forsyth Boulevard, Suite 2200  
St. Louis, Missouri 63105

Re: Proposed \$23,000,000 Multifamily Housing Revenue Bonds (Parkview Place Apartments)  
of The Industrial Development Authority of the County of St. Louis, Missouri


Ladies and Gentlemen:

We have been requested by Parkview Place Housing I, LLC, a Missouri limited liability company (the "Applicant"), to furnish you with our preliminary opinion with respect to the availability of private activity revenue bond financing pursuant to Chapter 349, Revised Statutes of Missouri, and Sections 103 and 141-150 of the Internal Revenue Code of 1986, as amended, for a project. We have been informed that the project consists of the acquisition and rehabilitation of approximately 156 apartment units located at 701 Westgate Avenue in University City, Missouri. We have reviewed preliminary sources and uses of funds that are included in the Applicant's application to be filed with the Housing Authority of St. Louis County.

It is our preliminary opinion that the project as described above qualifies for private activity revenue bond financing by The Industrial Development Authority of the County of St. Louis, Missouri pursuant to Chapter 349, RSMo. This preliminary opinion is subject to the completion of documentation satisfactory to this firm and the verification of certain facts with results satisfactory to this firm.

If you have any questions or wish to discuss this matter further, please contact me.

Very truly yours,



Weylin T. Watson

**CAPITOL OFFICE**  
State Capitol  
201 West Capitol Avenue  
Room 135 AC  
Jefferson City, MO 65101-6806  
Tele: (573) 751-4265

**E-Mail:**  
Joe.adams@house.mo.gov



**COMMITTEES:**  
~ Elections and Elected Officials,  
Ranking Member  
~ Financial Institutions  
~ Local Government, Ranking  
Minority Member  
~ Transportation Accountability

**MISSOURI HOUSE OF REPRESENTATIVES**

**Joe Adams**

District 86

November 28, 2023

Missouri Housing Development Commission  
920 Main Street, Suite 1400  
Kansas City, MO 64105

RE: SDG Housing Partners Application for 4% LIHTC Funding to Rehabilitate Parkview Place Apartments in University City, MO

Dear MHDC Rental Production,

Please consider the application for Parkview Place Apartments, conveniently located in the Historic Delmar Loop neighborhood in University City. In the recent months and years, there has been a significant development growth in the Historic Delmar Loop neighborhood. This project will be needed to support the continued population growth of the area and provide quality affordable housing to the 156 seniors that call Parkview Apartments their home.

The full rehabilitation of Parkview Place Apartments is crucial for the well-being of its residents, particularly following the recent upheaval caused by a water main break that led to the extended displacement for many of the Parkview residents. A safe and affordable home isn't just a necessity – it is a fundamental pillar that supports individual health economically thriving, and diverse communities. I firmly believe that SDG Housing Partners is committed to uplifting the standards at Parkview Place, ensuring that the senior residents, who consider it their sanctuary are provided with environment that resonates with safety, comfort and warmth.

I am in complete support the application by SDG Housing Partners for the rehabilitation of Parkview Place Apartments.

Sincerely,

A handwritten signature in cursive script that reads "Joseph L. Adams Jr.".

Rep. Joe Adams  
Missouri State Representative  
District 86

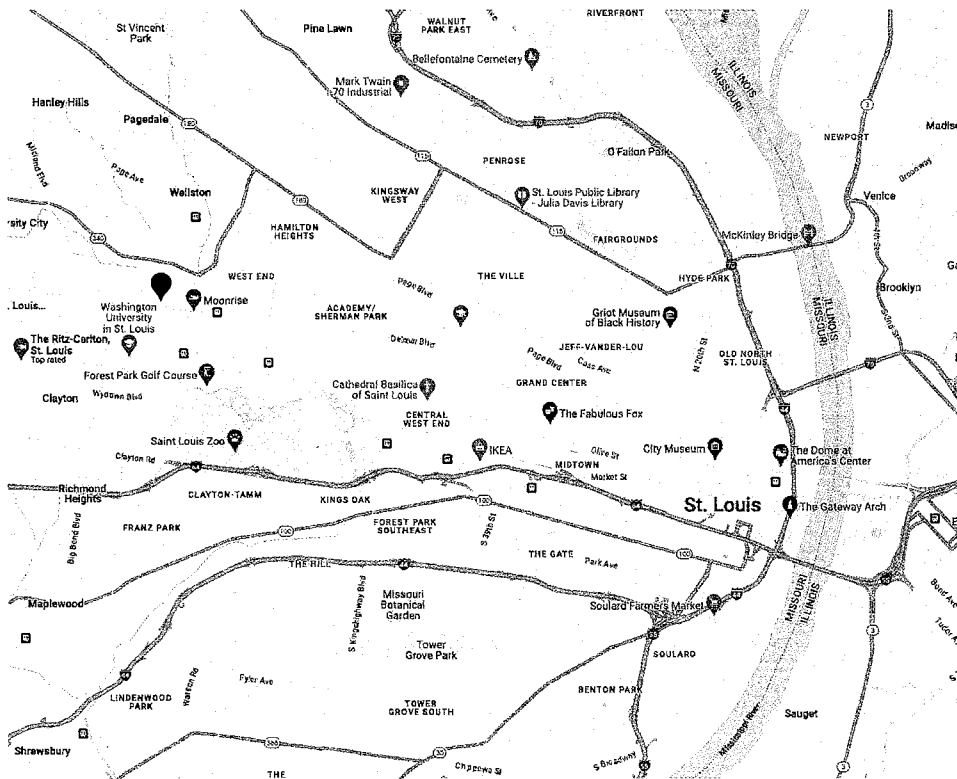
# SDG | HOUSING PARTNERS

## Parkview Place Apartments – Project Narrative

### The Project

Parkview Place Apartments is a multifamily apartment community located in University City, MO (marked on the map below) which SDG Housing Partners (“the Sponsor”) is acquiring in December of 2023. The Sponsor will renovate the property using low-income housing tax credits and tax-exempt bonds. The property is located at 701 Westgate Avenue, University City, MO, 63130.

The target population is a mix of very low- to moderate-income seniors. The project is dependent upon project-based subsidies as this will allow existing tenants to stay in the community. All existing tenants will continue to qualify for the property upon completion of the proposed renovation. The redevelopment and large-scale improvements will not only benefit the current residents, but the surrounding neighborhood as well. It is important to preserve Parkview Place Apartments as quality, affordable housing in an area that is seeing significant market rate development. The impact of the construction on the neighborhood will be minimal as there will be no ground up construction involved.



Location Map, Parkview Place Apartments

## **The Property**

Parkview Place consists of a 156-unit apartment tower located on a 0.74-acre lot. Originally constructed in 1972, the building consists of 39 efficiency & 117 one-bedroom apartments. The property is 100% supported by a Section 8 HAP Contract.

Current property amenities include onsite leasing, a full-time service coordinator, a business center, community room, fitness center, salon, and on-site laundry. Parking is available onsite for 39 vehicles. The property consists of one parcel of land (18H413313), located off of Westgate Avenue. The property is within walking distance of the Delmar Loop, multiple bus stops, a Link Metro Station, a local grocery store, and multiple restaurants. It is also a short drive to Walgreens, Walmart, St. Mary's Hospital, Forest Park, and Washington University in St. Louis. It is a mere 8-mile drive to St. Louis International Airport and a 17-minute drive to downtown St. Louis.



*Property Photo, Parkview Place Apartments*

## **Rehabilitation**

Several components of the buildings have reached the end of (or exceeded) their useful life and require repair, replacement, modernization, or to be brought into compliance with current codes or guidelines. Its renovation is necessary to maintain the area's limited supply of existing quality affordable housing in the primary market. The rehabilitation budget is approximately \$60,000 per unit. The rehabilitation will consist of everything from a renovation of the current leasing office to include a new library, business center, fitness center, and keyfob access.

The property will receive substantial upgrades in site amenities including a new Yoga/Pilates studio, new library, new game room, new computer workstations, and free WIFI for residents. Building exterior upgrades will include installing new asphalt at the parking area, pressure washing buildings and applying new paint, and elevator modernization. The interior renovation will consist of new appliances, new LED lighting, new low flow toilets, new faucets, new showerheads, WIFI in units, new HVAC systems and converting 5% of units to ADA. Additional items in the rehabilitation will include new signage, a new security camera system, auto gate entry, a new ADA path of travel (sidewalks), upgraded landscaping throughout the property, new site lighting, and a repaved, restriped parking lot.

The property renovation will commence immediately upon the bond closing and will be completed within 12 months thereafter. With the renovation upgrades, the project will provide housing comparable to the new developments in the market area and truly reshape a community that is in need of a renovation. SDG Housing Partners mission is to recreate communities to the highest standards to make a difference for the residents of the property and the community at large by providing exceptional quality housing. This is exemplified in the scope of work through the upgrade in unit quality & site amenities. Below you will find photos of some of our recent 4% LIHTC rehabilitations of Section 8 properties:

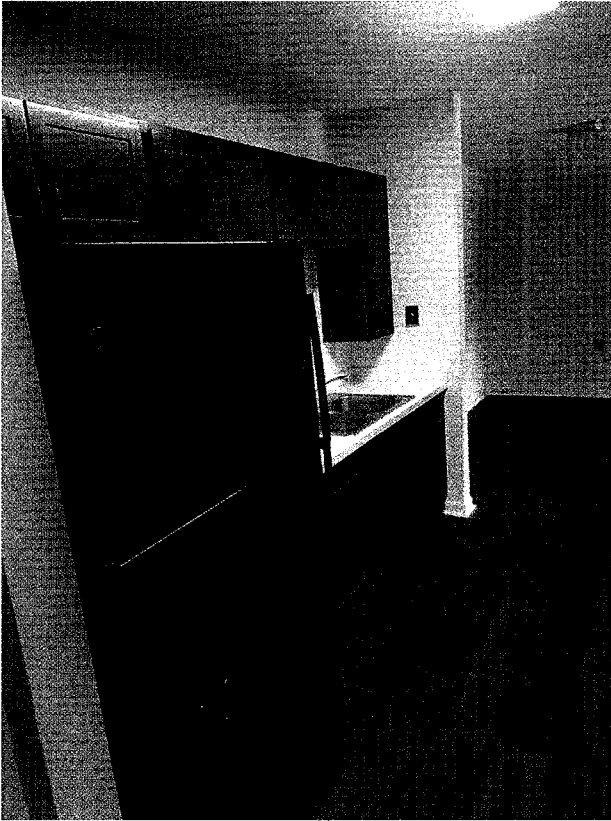


Building Exterior Before/After Examples

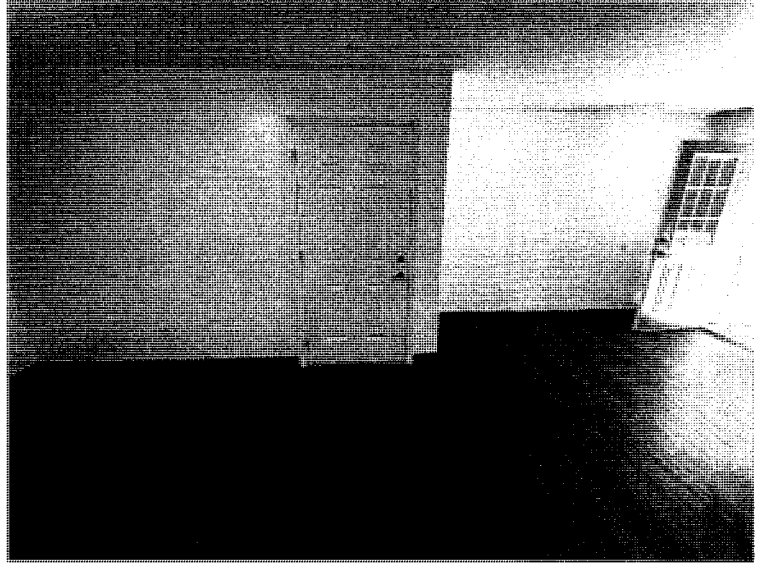


Parkview Place Apartments  
Project Narrative

Interior Unit Examples



*Ramblewood Apts – Clarksville, TN*



*Margaret Robertson Apts– Nashville, TN*

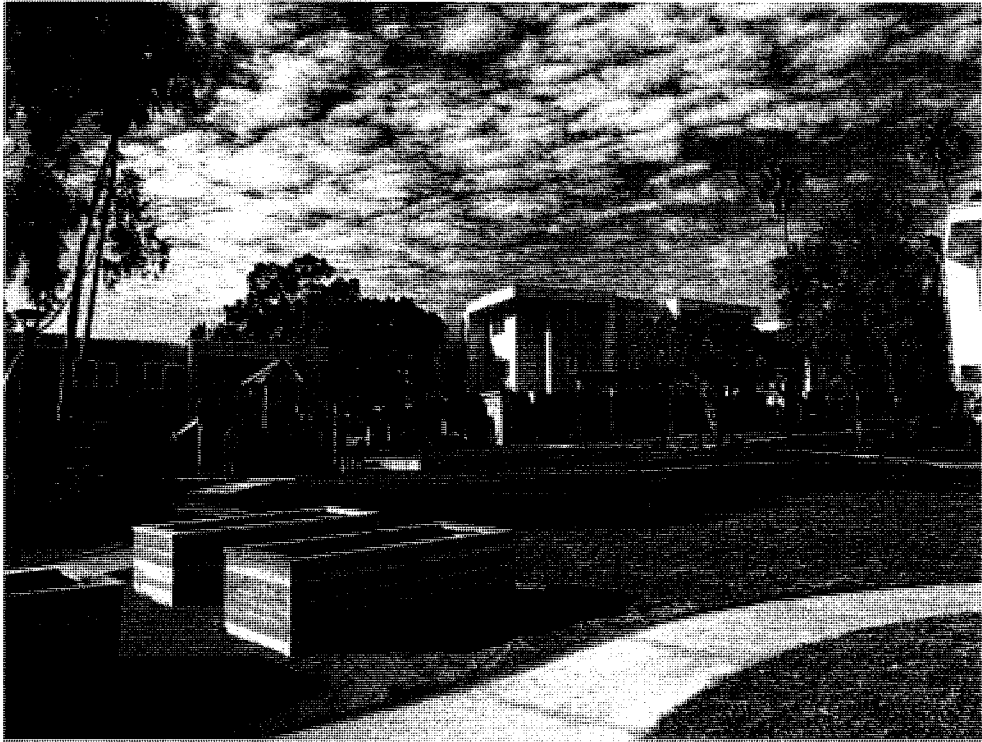
**Community & Site Amenity Examples**



*Columbus Park Plaza – Kansas City, MO*



*Cathedral Square Towers – Kansas City, MO*



*Park Western Estates – Los Angeles, CA*

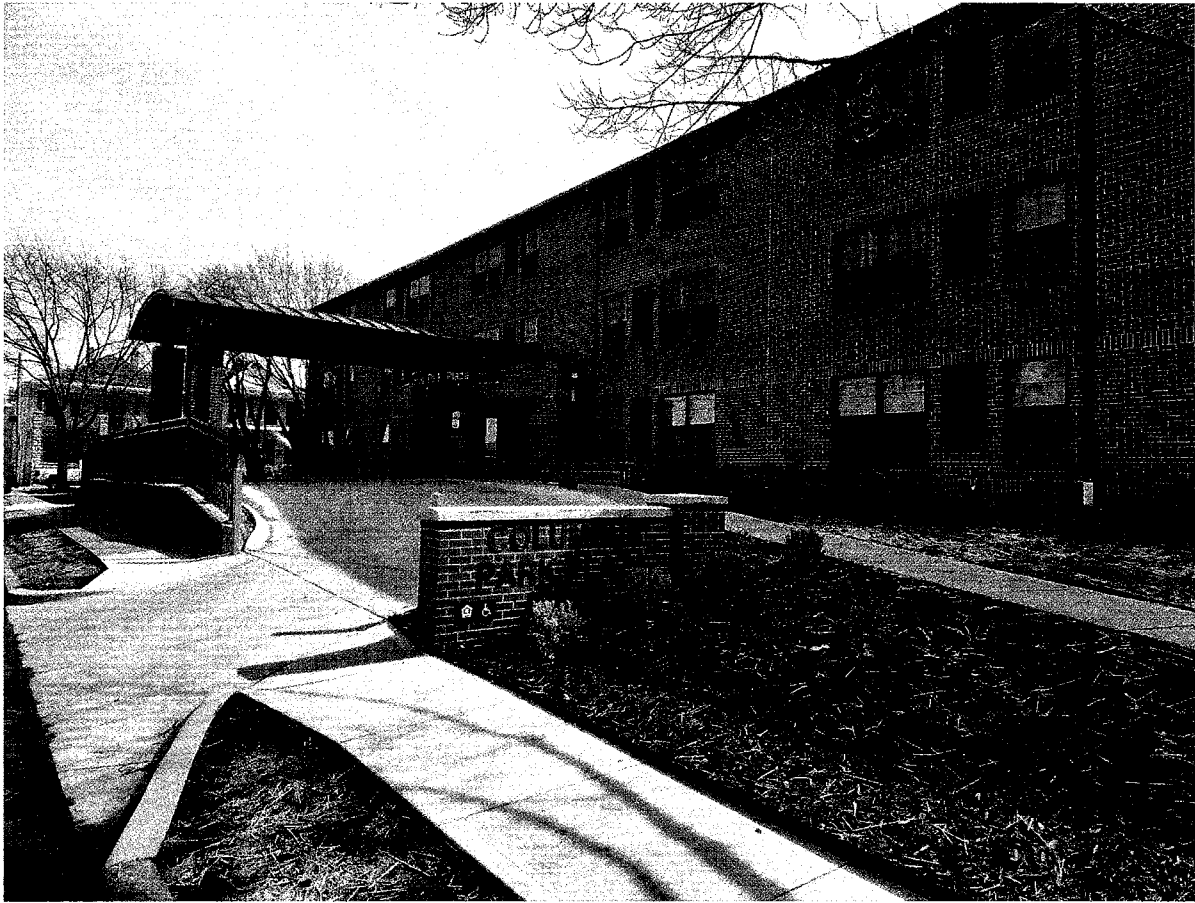


*Cathedral Square Towers – Kansas City, MO*



*La Villa Puente Apartments – Los Angeles, CA*

Parkview Place Apartments  
Project Narrative



*Columbus Park Plaza – Kansas City, MO, Exterior Building Post Rehab Example*



*La Villa Puente Apartments – Los Angeles, CA, New Construction Example of Clubhouse*

Parkview Place Apartments  
Project Narrative

## **Sponsor**

SDG Housing Partners was founded to renovate and preserve affordable housing with the will and passion to re-create communities to the highest standards to make a difference for the residents of the property and the community at large by providing exceptional quality housing. The principals of SDG Housing Partners have completed over 45 acquisitions and rehabilitations of affordable housing properties in California, Texas, Missouri, Kansas and Tennessee. The company is based in Los Angeles, CA with a regional office located in Kansas City, MO.

## **Property Management**

Property management will be changed to The Dalmark Group. The Dalmark Group was formed to provide innovative and quality residential property services for both conventional and affordable housing communities. Their proven track record and diversified experience in successfully redeveloping troubled properties, as well as developing new conventional and Low-Income Housing Tax Credit communities, is the cornerstone of their commitment as an organization to quality multifamily housing. It is their experience and understanding of these diverse markets which allow The Dalmark Group to continue to grow in the ever-changing climate of today's multifamily real estate market. While they are a regional company today, working primarily in Kansas and Missouri, their business model and growing opportunities are expanding their services nationwide.

Dalmark is an industry leader and expert in the areas of both conventional investment grade multi-family housing and affordable or work force housing. Their affordable housing base consists of extensive information regarding both Low Income Housing Tax Credits (IRS Section 42) and FHA/HUD rental programs; including section 8 Housing Assistance Payments (HAP Contracts), HUD 202 and PRAC senior housing.

Dalmark is the property management group for 4 properties that SDG Housing Partners is the sponsor on and will continue being the property manager for upcoming projects in the greater Missouri area. The three projects located in Missouri (Cathedral Square Towers, Columbus Park Plaza, and Marlborough Manor) total to 243 units. Currently all 243 units are occupied.

## **Project Timing**

The property renovation will commence immediately upon the bond closing and will be completed within 12 months thereafter.

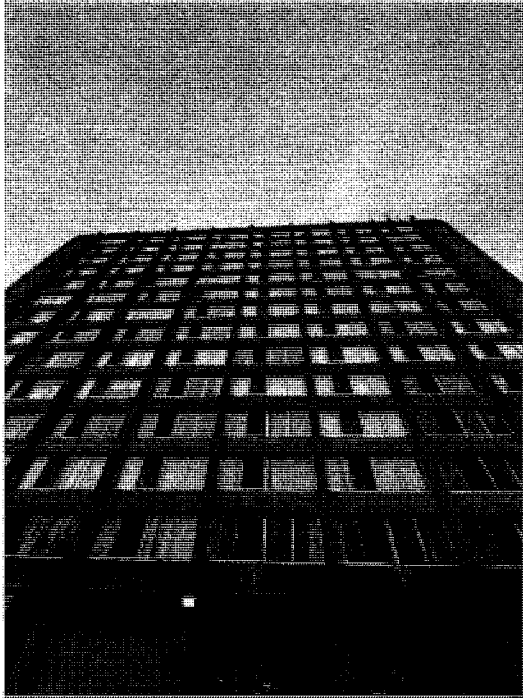
## **For Additional Information**

Michael Arman, Director of Development  
203.814.8171 (m), [mike@sdghousing.com](mailto:mike@sdghousing.com)

## Architectural Renderings

Architectural drawings & renderings are in process. Below are photos of Parkview Place Apartments & completed LIHTC/Tax Exempt Bond projects completed by the developer SDG Housing Partners.

**EXTERIOR - BUILDING FAÇADE**



*Parkview Place Apartments  
University City, MO*



*Cathedral Square Towers (SDG LIHTC Renovation)  
Kansas City, MO*



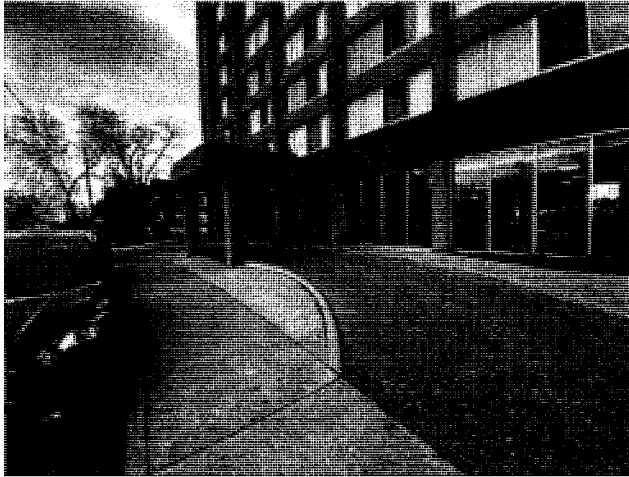
*Parkview Place Apartments  
University City, MO*



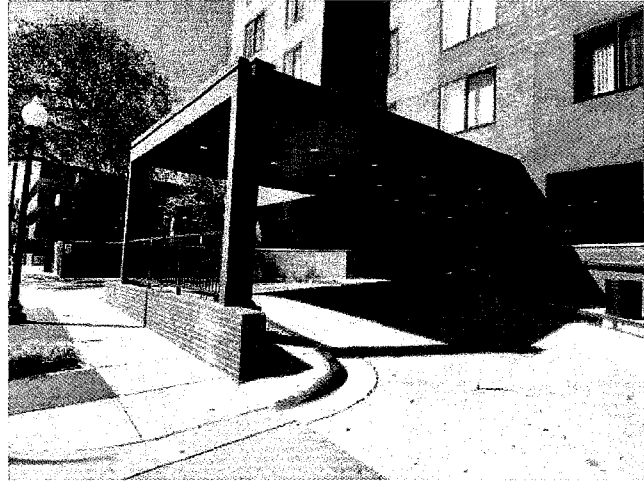
*Cathedral Square Towers (SDG LIHTC Renovation)  
Kansas City, MO*



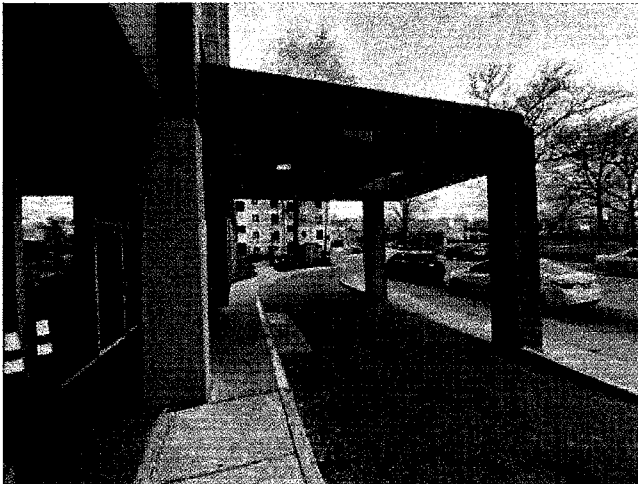
**FRONT ENTRANCE – ROUNDABOUT & PORTE-COCHERE**



*Parkview Place Apartments  
University City, MO*



*Cathedral Square Towers (SDG LIHTC Renovation)  
Kansas City, MO*

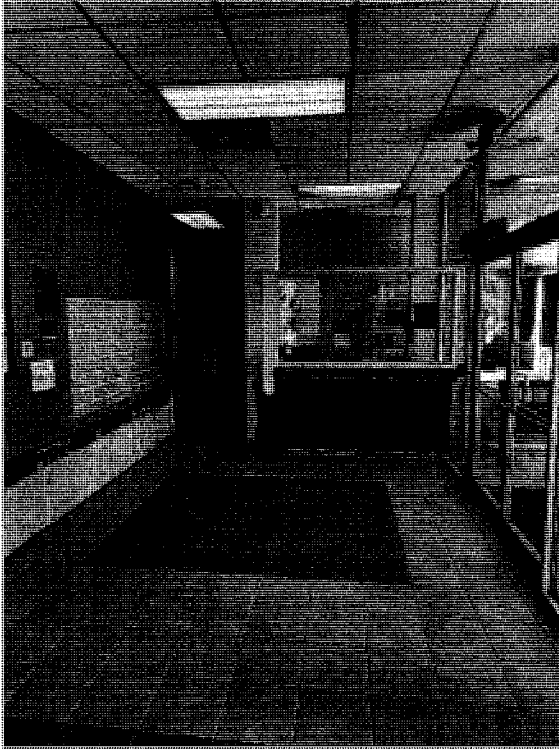


*Parkview Place Apartments  
University City, MO*



*Columbus Park Apartments (SDG LIHTC Renovation)  
Kansas City, MO*

## INTERIOR ENTRYWAY

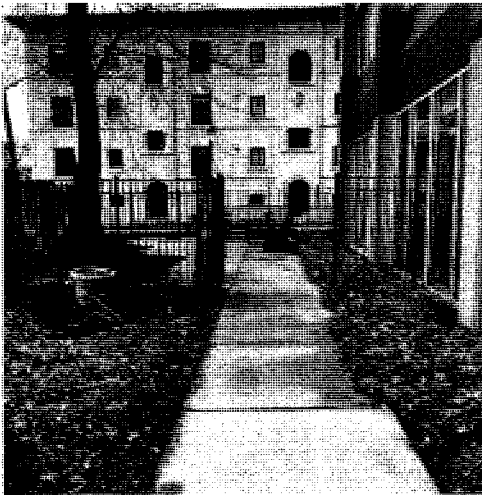


*Parkview Place Apartments  
University City, MO*



*Cathedral Square Towers (SDG LIHTC Renovation)  
Kansas City, MO*

## EXTERIOR COMMUNITY SPACE



*Parkview Place Apartments  
University City, MO*



*Cathedral Square Towers (SDG LIHTC Renovation)  
Kansas City, MO*

## COMMUNITY ROOM



*Regency Towers (Rick Siebert LIHTC Renovation)  
Inglewood, CA*



*Parkview Place Apartments  
University City, MO*

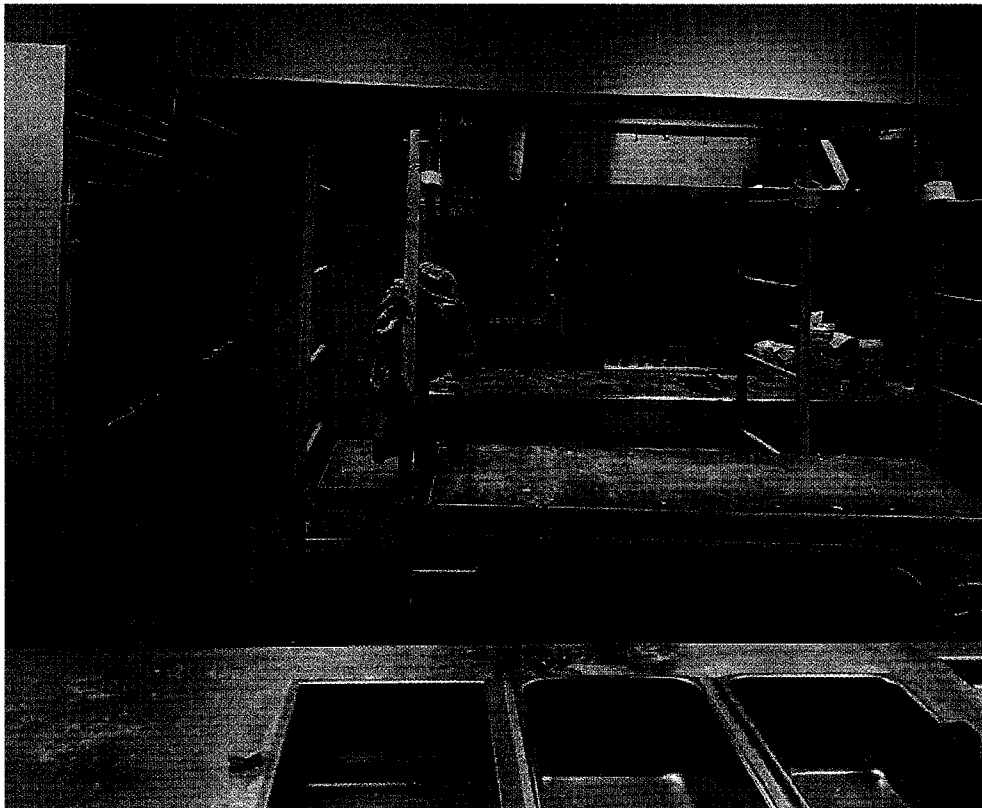


*Parkview Place Apartments  
University City, MO*

## COMMUNITY KITCHEN



*Granger Apartments (SDG LIHTC Renovation)  
National City, CA*



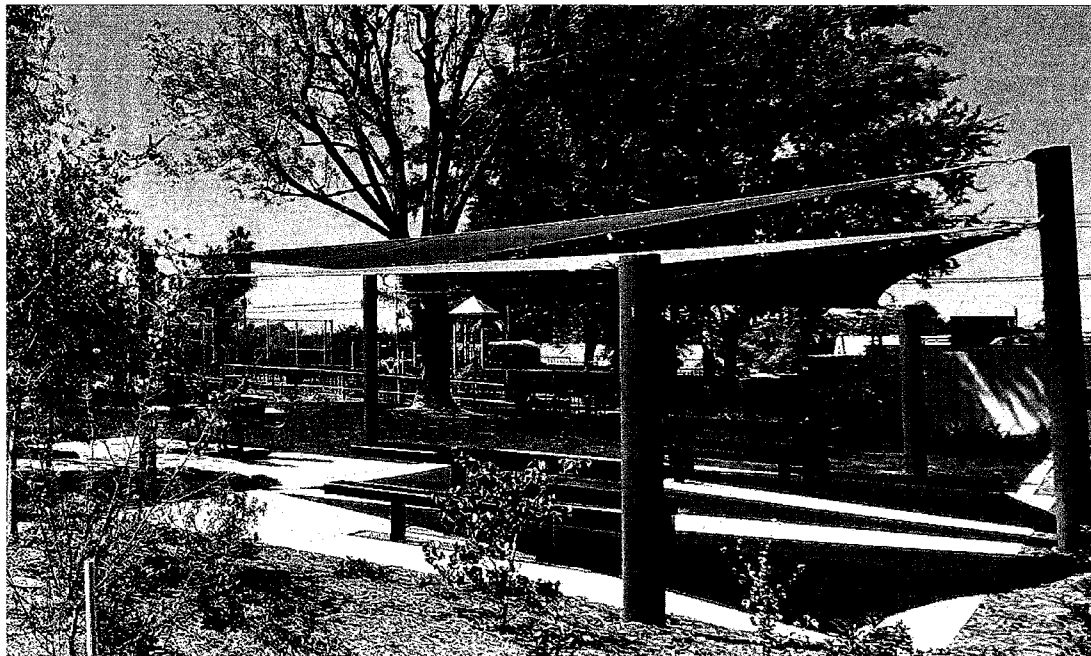
*Parkview Place Apartments  
University City, MO*

## **SITE AMENITIES - BUSINESS CENTER**



*Cathedral Towers (SDG LIHTC Renovation)  
Kansas City, MO*

## **SITE AMENITIES - OUTDOOR SEATING AREA**



*Lakeview Terrace (SDG LIHTC Renovation)  
Pacoima, CA*

**SITE AMENITIES – COMMUNITY GARDEN**



*Woodman Nordhoff Apartments (SDG LIHTC Renovation)  
Los Angeles, CA*



*Woodman Nordhoff Apartments (SDG LIHTC Renovation)  
Los Angeles, CA*



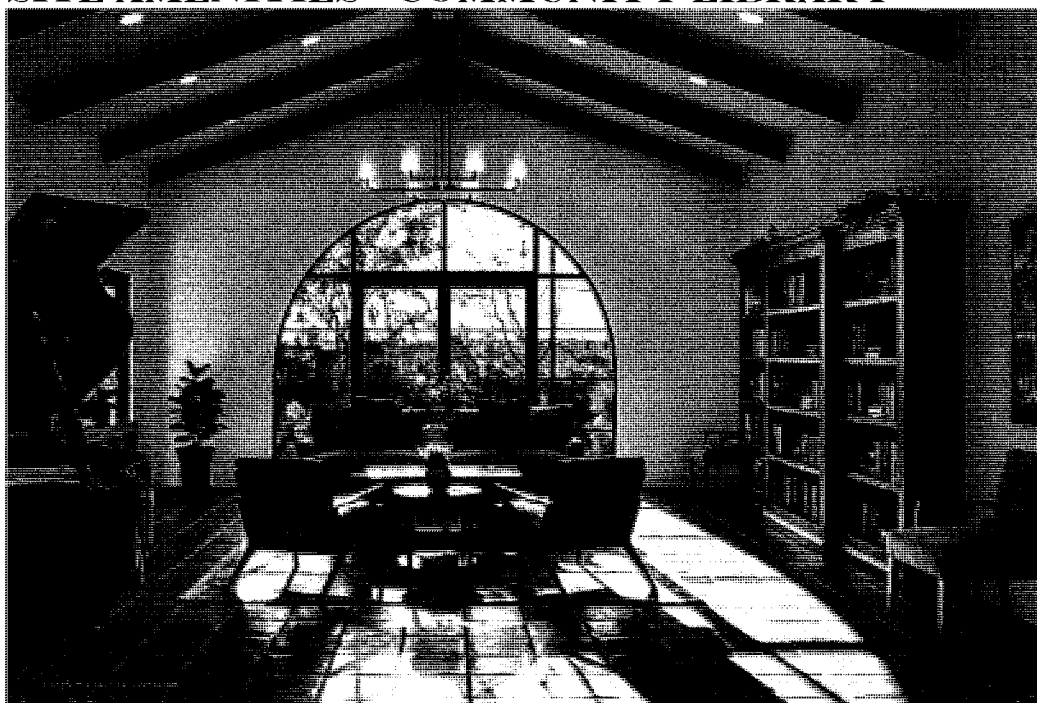
*Woodman Nordhoff Apartments (SDG LIHTC Renovation)  
Los Angeles, CA*

## **SITE AMENITIES – POOL TABLE**



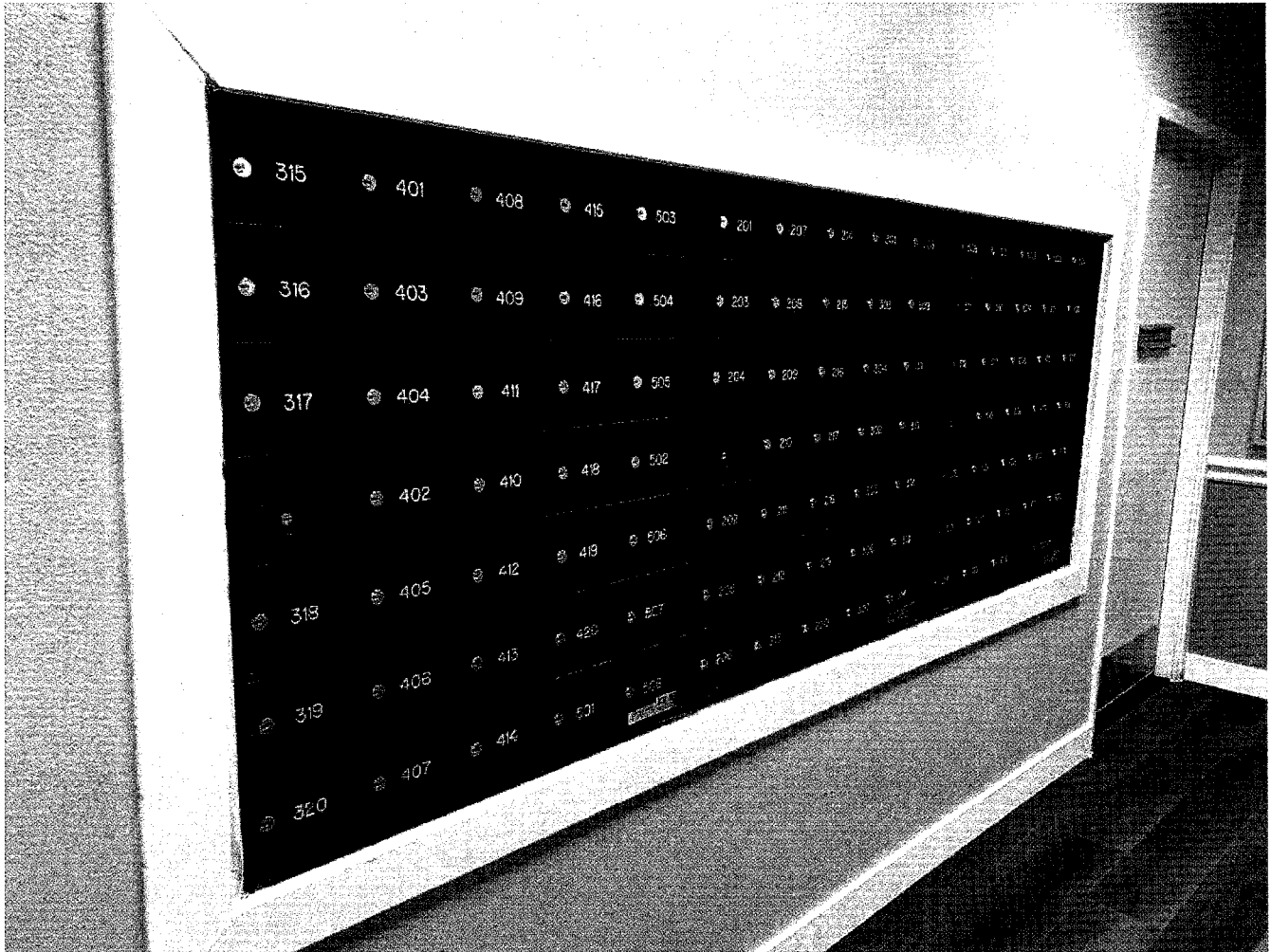
*Cathedral Towers (SDG LIHTC Renovation)  
Kansas City, MO*

## **SITE AMENITIES – COMMUNITY LIBRARY**

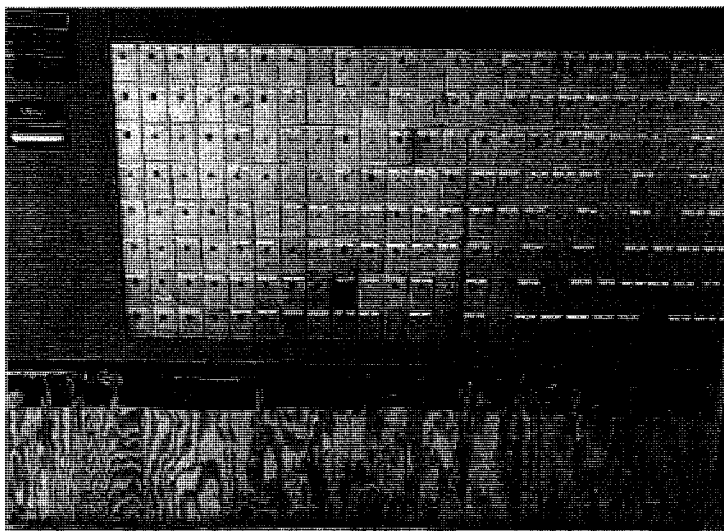


*La Villa Puente (SDG LIHTC Renovation)  
La Puente, CA*

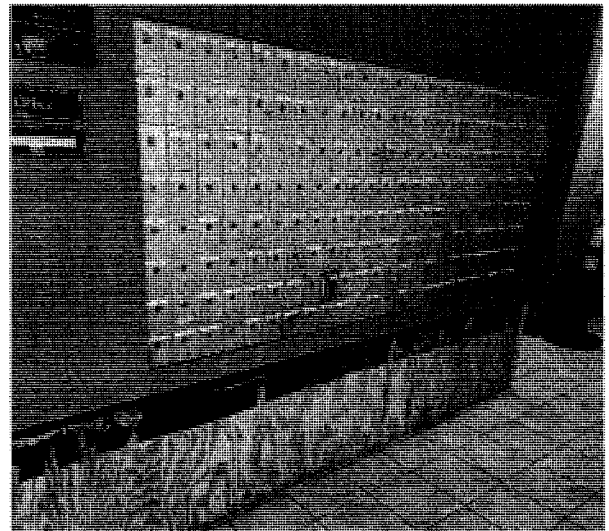
# MAILBOXES



*Cathedral Towers (SDG LIHTC Renovation)  
Kansas City, MO*



*Parkview Place Apartments  
University City, MO*



*Parkview Place Apartments  
University City, MO*



# ROOF



*Parkview Place Apartments  
University City, MO*



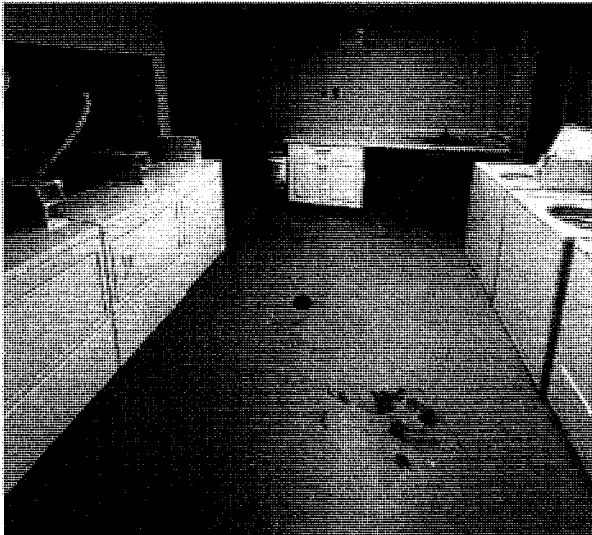
*Bayshore Towers (SDG LIHTC Renovation)  
Pasadena, TX*

## SIGNAGE



*Park Western Estates (SDG LIHTC Renovation)  
San Pedro, CA*

## LAUNDRY ROOM



*Parkview Place Apartments.  
University City, MO*



*Ramblewood Apartments (SDG LIHTC Renovation)  
Clarksville, TN*

## ASPHALT & PAVING

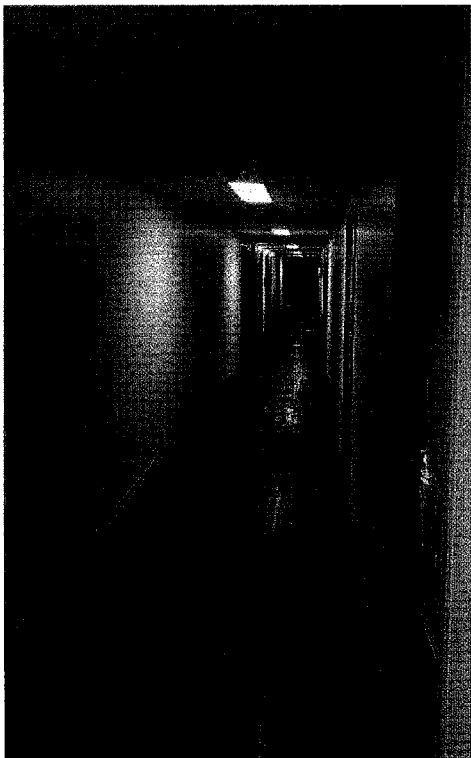


*Parkview Place Apartments  
University City, MO*



*Granger Apartments (SDG LIHTC Renovation)  
National City, CA*

## BUILDING INTERIOR HALLWAY

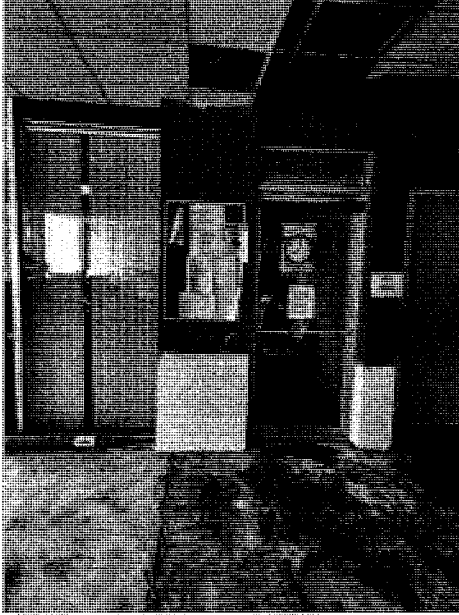


*Parkview Place Apartments  
University City, MO*



*Columbus Park Plaza (SDG LIHTC Renovation)  
Kansas City, MO*

## MANAGER'S OFFICE ENTRANCE



*Parkview Place Apartments  
University City, MO*

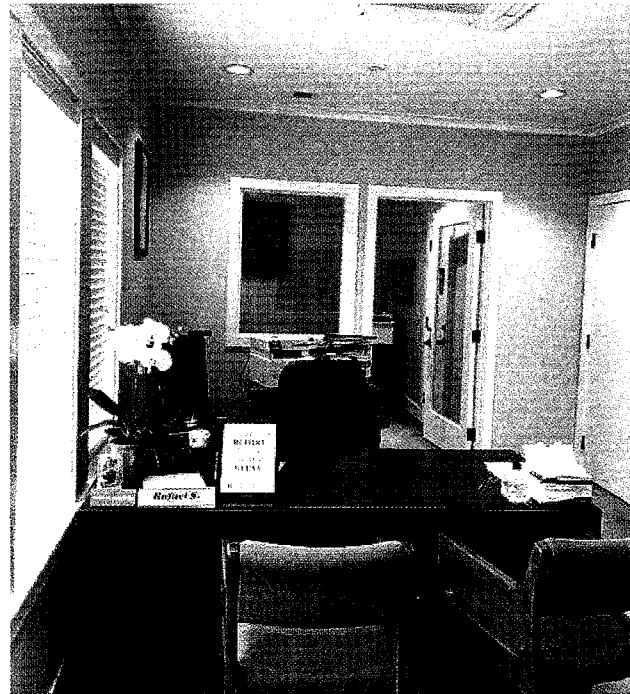


*Columbus Park Plaza (SDG LIHTC Renovation)  
Kansas City, MO*

## MANAGER'S OFFICE INTERIOR

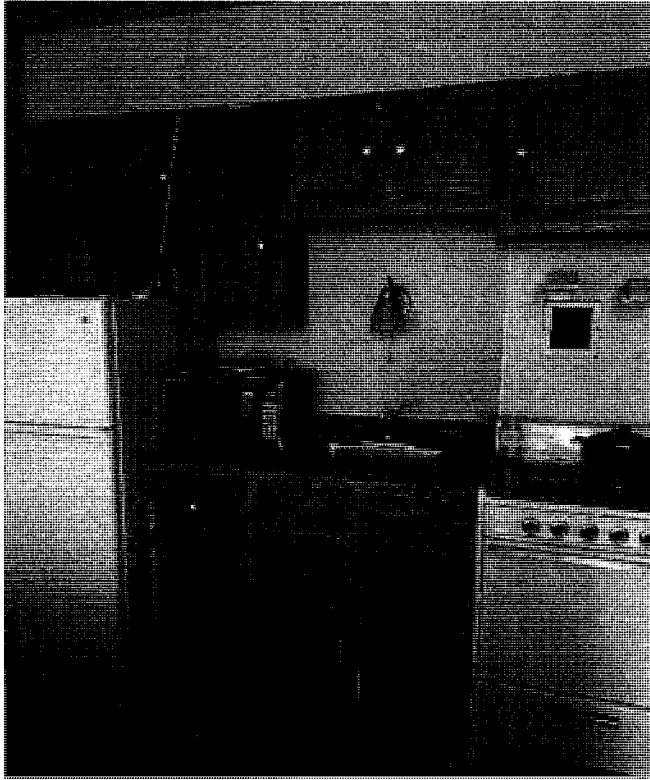


*Parkview Place Apartments  
University City, MO*

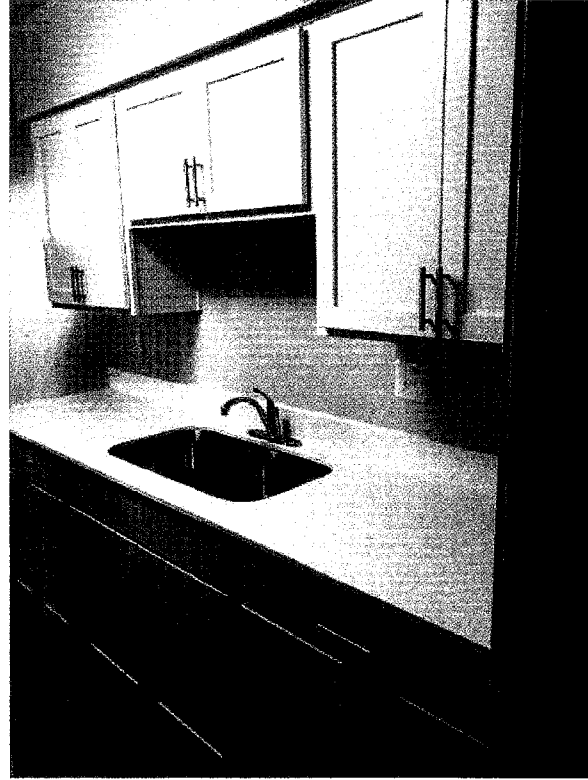


*Granger Apartments (SDG LIHTC Renovation)  
National City, CA*

## UNIT KITCHENS



*Parkview Place Apartments  
University City, MO*



*Lakeview Apartments (SDG LIHTC Renovation)  
Pacoima, CA*

[END of Photo Addendum]

**SDG** | HOUSING PARTNERS

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# **SDG** | HOUSING PARTNERS

## Table of Contents

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Recent Transactions

Experience

Key Principals

Project Participants Team

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Developer Acquisition & Renovation Examples

Reference Letters

# SDG | HOUSING PARTNERS

## EXPERIENCE



SDG Housing Partners was founded to renovate and preserve affordable housing with the will and passion to re-create communities to the highest standards to make a difference for the residents of the property and the community at large by providing exceptional quality housing.

The principals of SDG Housing Partners have completed over 45 acquisitions and rehabilitations of affordable housing properties in California, Texas, and Missouri. Most recently, SDG completed the acquisition of a portfolio of 3 affordable properties from the Catholic Charities of Kansas City.



# SDG | HOUSING PARTNERS

## RECENT TRANSACTIONS



### Recent Transactions with HUD Office

**Park Western Estates Apartments**  
Los Angeles, California  
216 Unit, Section 8, Family Apartments  
Preservation Closed 03/2019 - \$105M

**Bayshore Towers**  
Houston, Texas  
100 Unit, Section 8, Senior Apartments  
Preservation Closed 12/2018 - \$24M

**La Villa Puente Apartments**  
La Puente, California  
121 Unit, Section 8, Family Apartments  
Preservation Closed 12/2017 - \$55M

**Granger Apartments**  
National City, California  
180 Unit, Section 8, Senior Apartments  
Preservation Closed 12/2016 - \$47M

**Lakeview Terrace Apartments**  
Los Angeles, California  
128 Unit, Section 8, Family Apartments  
Preservation Closed 09/2019 - \$48M

**Cathedral Square Towers**  
Kansas City, Missouri  
156 Unit, Section 8, Senior Apartments  
Preservation Closed 10/2020 - \$38M

**Columbus Park Plaza**  
Kansas City, Missouri  
56 Unit, Section 8, Senior Apartments  
Preservation Closed 10/2020 - \$14M

**Marlborough Manor**  
Kansas City, Missouri  
31 Unit, Section 8, Senior Apartments  
Preservation Closed 10/2020 - \$5M

**Woodman Nordoff Apartments**  
Los Angeles, California  
80 Unit, Section 8, Family Apartments  
Preservation Closed 04/2021 - \$45M

**Arleta Apartments**  
Los Angeles, California  
24 Unit, Section 8, Family Apartments  
Preservation Closed 04/2021 - \$14M

**Ramblewood Apartments**  
Clarksville, Tennessee  
112 Unit, Section 8, Family Apartments  
Preservation Closed 9/2022 - \$18M

**Margaret Robertson Apartments**  
Nashville, TN  
100 Unit, Section 8, Family Apartments  
Preservation Closed 12/2022 - \$27M

# SDG | HOUSING PARTNERS

## Experience

### Housing and Urban Development (HUD) Transactions

#### SDG Housing Partners, LLC

<u>Project</u>	<u>Location</u>	<u>Completion</u>	<u>New/Rehab</u>	<u>Equity</u>	<u>Debt</u>	<u>Population</u>	<u>Units</u>	<u>Project Cost</u>
Margaret Robertson Apartments	Hermitage, TN	2023	Rehab	4% Tax Credit	Freddie	Family	100	27,000,000
Ramblewood Apartments	Clarksville, TN	2023	Rehab	4% Tax Credit	Freddie	Family	112	18,000,000
Woodman Arleta Apartments	Los Angeles, CA	2022	Rehab	9% Tax Credit	HUD 221d4	Family	104	59,000,000
Cathedral Square Towers	Kansas City, MO	2021	Rehab	4% Tax Credit	HUD 221d4	Senior	156	38,000,000
Columbus Park Plaza	Kansas City, MO	2021	Rehab	4% Tax Credit	HUD 221d4	Senior	56	14,000,000
Marlborough Manor	Kansas City, MO	2020	Acquisition	-	Conv	Senior	31	5,000,000
Park Western Estates	San Pedro - LA, CA	2020	Rehab	4% Tax Credit	TE Bonds	Family	216	105,000,000
Lakeview Terrace	Palooma -LA, CA	2020	Rehab	4% Tax Credit	TE Bonds	Family	128	48,000,000
Baysshore Towers	Houston, TX	2019	Rehab	4% Tax Credit	HUD 221d4	Senior	100	24,000,000
La Villa Puente Apartments	La Puente, CA	2018	Rehab	4% Tax Credit	TE Bonds	Family	121	55,000,000
Granger Apartments	National City - SD, CA	2017	Rehab	4% Tax Credit	TE Bonds	Senior	180	47,000,000
							Subtotal:	1304 \$ 440,000,000

#### Previous Firm Experience

<u>Project</u>	<u>Location</u>	<u>Completion</u>	<u>New/Rehab</u>	<u>Equity</u>	<u>Debt</u>	<u>Population</u>	<u>Units</u>	<u>Project Cost</u>
Wilshire Manor	Korea Town - LA, CA	2015	Rehab	4% Tax Credit	HUD 221d4	Senior	287	65,000,000
Whittier Towers	Whittier, CA	2014	Rehab	9% Tax Credit	HUD 221d4	Senior	156	24,000,000
William Penn Manor	Whittier, CA	2014	Rehab	4% Tax Credit	HUD 221d4	Senior	75	15,000,000
Foothill Terrace	Sylmar - LA, CA	2013	Rehab	9% Tax Credit	HUD 221d4	Family	40	12,700,000
The Woods	Playa Vista - LA, CA	2013	New Const	9% Tax Credit	Conv	Senior	83	22,000,000
Covina Gardens	Covina, CA	2012	Rehab	Market Rate	Conv	Senior	90	12,500,000
Montecito	Hollywood LA, CA	2012	Rehab	4% Tax Credit	HUD 223f	Senior	116	17,000,000
Eucalyptus Park	Inglewood, CA	2012	Rehab	9% Tax Credit	HUD 221d4	Senior	93	21,000,000
Regency Towers	Inglewood, CA	2010	Rehab	9% Tax Credit	TE Bonds	Senior	106	21,000,000
Gardens on Garfield	Glendale, CA	2010	New Const	9% Tax Credit	Conv	Family	30	12,000,000
Leffingwell Manor	Whittier, CA	2009	Rehab	4% Tax Credit	TE Bonds	Senior	90	17,000,000
Arrow Plaza	Covina, CA	2009	Rehab	4% Tax Credit	TE Bonds	Senior	64	11,000,000
Drake Manor	Pomona, CA	2009	Rehab	4% Tax Credit	TE Bonds	Family	109	14,000,000
Cherrylee Gardens	El Monte, CA	2009	Rehab	4% Tax Credit	TE Bonds	Senior	78	14,000,000
Renaissance	Carson, CA	2009	New Const	Market Rate	HUD 221d4	Family	150	44,000,000
Gateway	Carson, CA	2009	New Const	9% Tax Credit	Conv	Senior	83	17,500,000
Rittenhouse Square	Los Angeles, CA	2009	New Const	9% Tax Credit	Conv	Senior	100	22,000,000
Casa Lucerna	Los Angeles, CA	2009	Rehab	4% Tax Credit	TE Bonds	Senior	74	9,500,000
Inglewood Meadows	Inglewood, CA	2008	Rehab	4% Tax Credit	TE Bonds	Senior	199	22,000,000
Regent Plaza	Inglewood, CA	2008	Rehab	4% Tax Credit	TE Bonds	Senior	108	15,000,000
							Subtotal:	2,131 \$ 408,200,000

**Totals: 3,435 \$ 848,200,000**

# SDG | HOUSING PARTNERS

## Project Participants

HUD Attorney  
Nathaniel Cushman  
Partner  
Nixon Peabody, LLP  
300 South Grand Avenue, Suite 4100  
Los Angeles, CA 90071-3151  
ecampbell@nixonpeabody.com  
(213) 629-6197

Transactional Attorney  
Kyle Arndt  
Partner  
Bocarsly Emden Cowan Esmail & Arndt LLP  
633 West Fifth Street, 64th Floor  
Los Angeles, CA 90071  
karndt@bocarsly.com  
(213) 239-8048

# SDG | HOUSING PARTNERS

## KEY PRINCIPALS

### Rick Siebert, Managing Director

Mr. Siebert is an expert in structuring, acquiring, and renovating HUD Section 8 apartment properties utilizing FHA/HUD debt combined with Tax Exempt Bond financing and Federal Low Income Housing Tax Credits. With a background in architecture, Mr. Siebert ensures that his projects are renovated with the highest attention to detail which consistently results in housing of superior quality.

Before founding SDG Housing Partners, Mr. Siebert was the Chief Financial Officer and Principal at Thomas Safran and Associates (TSA) where he was ultimately responsible for all Acquisition and Renovation projects within TSA. While at TSA Mr. Siebert oversaw over 400 million dollars of real estate transactions and development or renovation of over 2,000 residential units.

Prior to TSA, Mr. Siebert was a Development Manager at Playa Capital Company LLC, the master developer of Playa Vista, a 1,087-acre urban infill project with 5,842 residential units and 4 million sq. feet of commercial and motion picture studio space. During his tenure at Playa Capital Company Mr. Siebert was a member of the entitlement team of Phase 2 "the Village" of Playa Vista; composed of a 111-acre subdivision with 2,600 dwelling units and 200,000 s.f. of retail space.

### Lon Booher, Partner

Mr. Booher is the primary point of contact for our design and construction teams. With an extensive background in architecture, construction management, and real estate development, Mr. Booher has a primary focus on multi-family and Historic Tax Credit re-development.

Prior to joining SDG, Mr. Booher was managing member of a pioneer design/build firm located in Kansas City, Missouri. He successfully executed over 30 million dollars of design/build contracts consisting of residential, hospitality, and office space. 70 percent of these projects utilized federal and state historic tax credits with his team facilitating the development group's design approval by the National Park Service along with IRS construction cost certification requirements.

During this tenure, Mr. Booher has personally participated in the re-development of a 35,000 sq.ft. historic pre-prohibition brewery, several successful commercial projects in the historic "Westside" neighborhood of Kansas City, and the oldest standing hotel in downtown Kansas City. The latter receiving both the Kansas City Economic Development Corporation Cornerstone Award and the Preserve Missouri award from the Missouri Preservation Society in Jefferson City.

# SDG | HOUSING PARTNERS

## STANDARD RENOVATION SCOPE



### Building Exterior Improvements

- Installation of New Windows
- Installation of New Energy Efficient Cool Roof
- New Entry Porch with Key fob entry system and enhanced security system, with Covered Pergola Seating Area at Drop Off Driveway
- New Patio Railings and Deck Waterproofing
- Painting of Exterior Building
- New Light Fixtures and Signage
- Installation of new Central Satellite and other roof systems.

# SDG | HOUSING PARTNERS

## STANDARD RENOVATION SCOPE



### Common Areas

- Enhanced TV Area with Seating Area
- Billiards Table / Card Tables
- Library and Sitting Areas
- Accessible Common Area Restrooms
- Upgrade Elevators
- New Re-modelled Community Kitchen
- Computer Stations / Tech Room
- Renovated Mail Room

# SDG | HOUSING PARTNERS

## STANDARD RENOVATION SCOPE

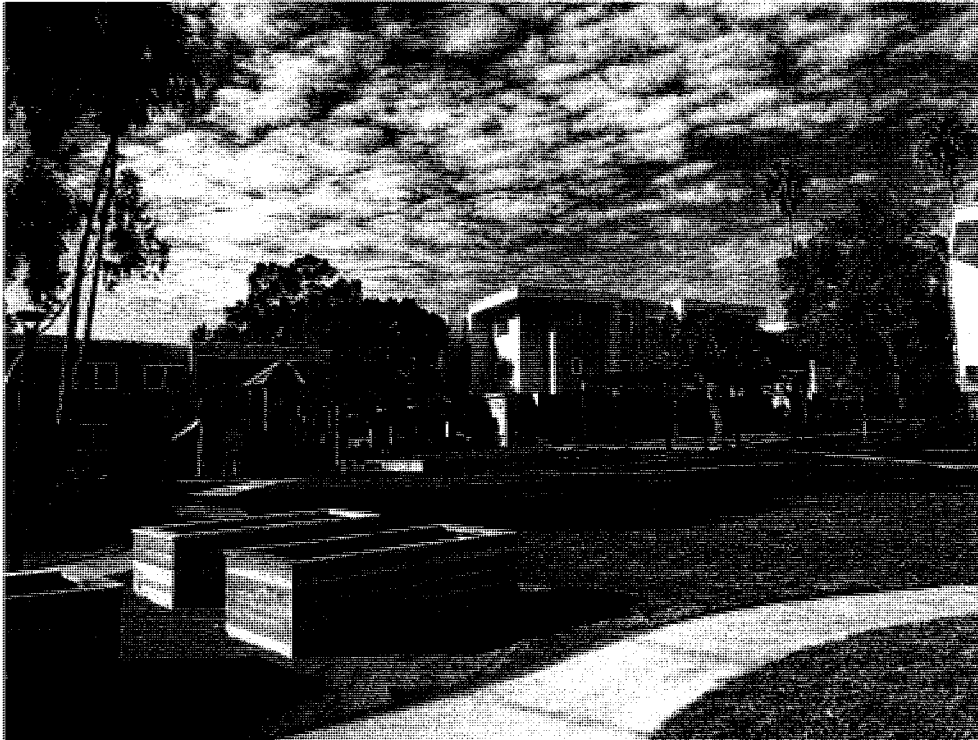


### Common Areas (continued)

- New Resident Services Office for Project Access adjacent to Community Room
- Create Theme for Art Work at each Floor for wayfinding and sense of home
- New Light Fixtures, Paint, and Carpet in all Hallways and common areas
- Renovated Laundry Room
- Security Camera Upgrades
- Update Management Office
- Managers Apartment Upgrades
- Upgrade Fire Alarm System

# SDG | HOUSING PARTNERS

## STANDARD RENOVATION SCOPE



### Site Work

- New Lighting at Building and Parking
- New Parking Lot Surface and Striping
- New Site Gates / Access Points – Key Fobs
- Construct Resident Gardens with raised planters and Tool Shed
- New Lush and Colorful Landscaping surrounding property
- Landscaping – New BBQ Areas for resident and family use at back patio
- Enhanced Exterior Security Cameras

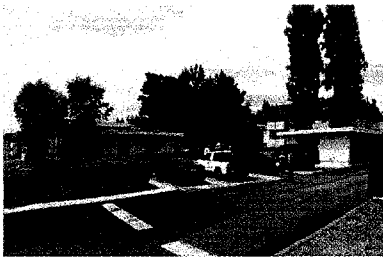


# SDG | HOUSING PARTNERS

## BEFORE AND AFTER EXAMPLE

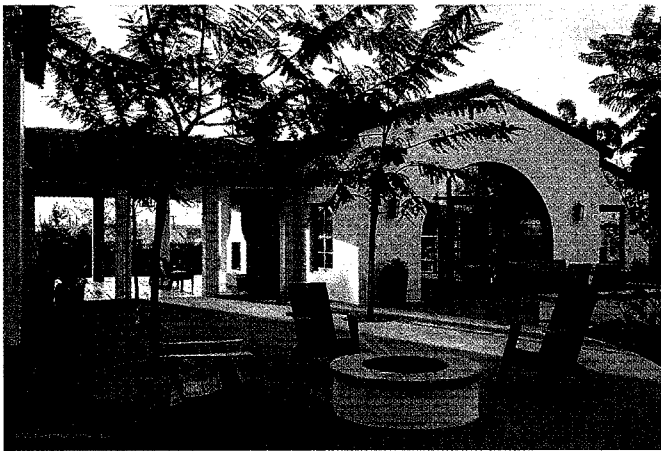
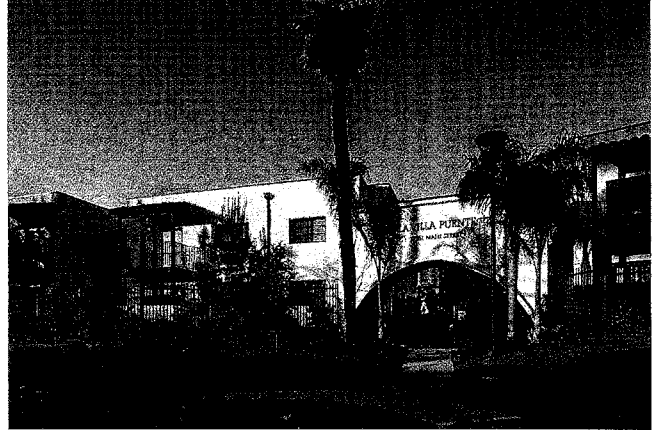
La Villa Puente Apartments  
La Puente, California

Lender: R4  
Equity Investor: R4



# SDG | HOUSING PARTNERS

La Villa Puente Apartments  
La Puente, California



# SDG | HOUSING PARTNERS

## BEFORE AND AFTER EXAMPLE

Granger Apartments  
National City, California

Lender: Citi  
Equity Investor: Raymond James



# SDG | HOUSING PARTNERS

Granger Apartments  
National City, California



# SDG | HOUSING PARTNERS

Letter of Reference  
Catholic Charities of Kansas City

To Whom It May Concern:

Please accept this letter of recommendation on behalf of SDG Housing Partners ("SDG"). SDG recently purchased a portfolio of three affordable housing properties (Cathedral Square Towers, Columbus Park Plaza, and Marlborough Manor). The sellers were entities organized under U.S. Housing and Urban Development regulations and sponsored by Catholic Charities of Kansas City – St. Joseph, Inc.

All three properties were originally built in the 1970s and 1980s under the HUD 202 program and it was important for the Catholic Charities to find a buyer that would be good long-term stewards of the properties for the residents and communities at large. In August of 2019, we marketed the portfolio and ultimately chose SDG based on their competitive offer, their proven record of rehabbing senior Section 8 properties and their commitment to preserving affordable housing.

Throughout the escrow period the principals of SDG, June Park and Rick Siebert, were our main contacts and were readily available. They kept us fully updated of the process, remained transparent, and shepherded the transaction through the unforeseeable challenges of the COVID-19 pandemic.

When some of our elderly residents became anxious that the properties were being sold to market rate developers and worried they would be displaced, the principals of SDG personally called all concerned residents to appease their fears and address any apprehension.

As the CEO of Catholic Charities of Kansas City-St. Joseph, I am very pleased to offer a letter of recommendation for SDG Housing Partners. They have excellent industry expertise coupled with a passion and commitment to preserve affordable housing while revitalizing communities.

Sincerely,

*Karen Noel*

Karen Noel  
Chief Executive Officer  
Catholic Charities of Kansas City – St. Joseph

**RENTAL HOUSING PROGRAMS APPLICATION**  
EXPERIENCE SUMMARY – OWNER/DEVELOPER/PROPERTY MANAGER

**SDG Housing Partners**  
1600 Rosecrans Avenue BLDG 7 STE 400  
Manhattan Beach, CA 90266

Entity Type (one)  
 Individual  
 Partnership  
 Corporation

Proposed Role in Development:  Owner  Developer  Property Manager  Federal ID# / SS# \_\_\_\_\_

Development Name City, State	Date Acquired or Constructed	Low Income**	Unit Count		Special Need	Financing Sources/ Government Programs	Current Occup. %	Participation Period		Any Foreclosure, Default, Lawsuits*?			
			Market	Developer				From:	To:	Yes	No		
Ridgebrook Apartments Knoxville, TN	2022	144				KeyBank	98.0%		2022	Present	Yes	x	No
Hickory Forest Apartments Nashville, TN	2022	90				KeyBank	100.0%		2022	Present	Yes	x	No
Margaret Robertson Apartments Hermitage, TN	2022	100				KeyBank	99.0%		2022	Present	Yes	x	No
Ramblewood Apartments Clarksville, TN	2022	112				KeyBank	95.0%		2022	Present	Yes	x	No
Clarion Park Apartments Olathe, KS	2021	220				Rose Community Capital	92.0%		2021	Present	Yes	x	No
Arteta Park Apartments Los Angeles, CA	2021	24				PNC	100.0%		2021	Present	Yes	x	No
Woodman Nordhoff Apartments Los Angeles, CA	2021	80				PNC	100.0%		2021	Present	Yes	x	No
Cathedral Square Towers Kansas City, MO	2020	156				PNC	100.0%		2020	Present	Yes	x	No
Columbus Park Plaza Kansas City, MO	2020	56				PNC	100.0%		2020	Present	Yes	x	No
Mariborough Manor Kansas City, MO	2020	31				Ziegler	100.0%		2020	Present	Yes	x	No
Park Western Estates San Pedro, CA	2019	216				Wilmington Trust	98.0%		2019	Present	Yes	x	No
Bayshore Towers Pasadena, TX	2018	100				PNC	99.0%		2018	Present	Yes	x	No
La Villa Puente Apartments La Puente, CA	2017	121				Wilmington Trust	100.0%		2017	Present	Yes	x	No
Granger Apartments National City, CA	2016	180				Cliff Bank	100.0%		2016	Present	Yes	x	No
											Yes		No
											Yes		No
											Yes		No
											Yes		No
											Yes		No
											Yes		No
											Yes		No
											Yes		No
											Yes		No
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											Yes		No
											Yes		No
											Yes		No

\* If "Yes" in any case, provide full details on the back of this form or on a separate sheet.  
Form FIN-105