



Health Housing and
Community Services Department
Housing & Community Services Division

March 12, 2019

This agenda packet was revised to include the two listed attachments referenced in Attachment 2: CDBG Subcommittee FY2020-2023 Community Agency Funding Recommendations (related to agenda item #5).

This revised packet also includes public correspondence to the Housing Advisory Commission received after the first publication of the packet (Attachment 3).

Mike Uberti
Acting Secretary, Housing Advisory Commission

A Vibrant and Healthy Berkeley for All

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Housing Advisory Commission

HOUSING ADVISORY COMMISSION

REVISED AGENDA

Revised March 12, 2019

Special Meeting

Wednesday, March 13, 2019
7:00 pm

South Berkeley Senior Center

2939 Ellis Street
Secretary Amy Davidson, (510) 981-5406

All agenda items are for discussion and possible action.

Public comment policy: Members of the public may speak on items being considered at the Special Meeting during the Public Comment period. Members of the public may also comment on any item listed on the agenda as the item is taken up. There is no non-agenda public comment at special meetings. Members of the public may not speak more than once on any given item. The Chair may limit public comments to 3 minutes or less.

1. Roll Call
2. Special Meeting Agenda Approval
3. Public Comment
4. Approval of the March 7, 2019 Regular Meeting Minutes (*Attachment 1*)
5. Discussion and Possible Action to Revise the Adopted Community Development Block Grant (CDBG) Subcommittee Recommendations for FY 2020 Community Agency Request for Proposals Funding – *All (Attachment 2)*
6. Adjourn

Attachments

1. Draft March 7, 2019 Regular Meeting Minutes
2. CDBG Subcommittee FY2020-2023 Community Agency Funding Recommendations

Correspondence

3. Alice La Pierre, Rebuilding Together East Bay-North

This meeting is being held in a wheelchair accessible location. To request a disability-related accommodation(s) to participate in the meeting, including auxiliary aids or services, please contact the Disability Services Specialist at 981-6418 (V) or 981-6347 (TDD) at least three business days before the meeting date. Please refrain from wearing scented products to this meeting.

Any writings or documents provided to a majority of the Commission regarding any item on this agenda will be made available for public inspection at the Health, Housing & Community Services Department located at 2180 Milvia Street, 2nd Floor during regular business hours. Agenda packets and minutes are posted online at:

https://www.cityofberkeley.info/Housing_Advisory_Commission/

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HOUSING ADVISORY COMMISSION
Regular Meeting
Thursday, March 7, 2019

Housing Advisory Commission

Time: 7:02 pm

South Berkeley Senior Center
2939 Ellis Street – Berkeley
Acting Secretary – Mike Uberti, (510) 981-5114

DRAFT MINUTES

1. Roll Call

Present: Sarah Abdeshahian (substitute for Darrell Owens), Xavier Johnson, Thomas Lord, Alex Sharenko, Leah Simon-Weisberg, Igor Tregub, Marian Wolfe and Amir Wright.

Absent: Darrell Owens (excused) and Maryann Sargent (excused)

Commissioners in attendance: 8 of 8

Staff Present: Rhianna Babka, Jenny McNulty, Alex Roshal, Mike Uberti, Jenny Wyant

Members of the public in attendance: 20

Public Speakers: 10

2. Agenda Approval

Action: M/S/C (Wolfe/Wright) to move Agenda Item #11 before Agenda Item #9 and Agenda Item #12 before Agenda Item #10, and to approve the agenda.

Vote: Ayes: Abdeshahian, Johnson, Lord, Sharenko, Simon-Weisberg, Tregub, Wolfe and Wright. Noes: None. Abstain: None. Absent: Owens (excused) and Sargent (excused).

3. Public Comment

There were four speakers during public comment.

4. Approval of the February 7, 2019 Regular Meeting Minutes

Action: M/S/C (Tregub/Lord) to approve the minutes.

Vote: Ayes: Johnson, Lord, Sharenko, Simon-Weisberg, Tregub, Wolfe and Wright.

Noes: None. Abstain: Abdeshahian. Absent: Owens (excused) and Sargent (excused).

5. Discussion and Possible Recommendation on the Rental Housing Safety Program Proposed Fee Increase

Action: M/S/C (Tregub/Lord) to recommend to City Council to approve the Rental Housing Safety Program fee increases recommended by staff.

Vote: Ayes: Abdeshahian, Johnson, Lord, Sharenko, Simon-Weisberg, Tregub, Wolfe and Wright. Noes: None. Abstain: None. Absent: Owens (excused) and Sargent (excused).

6. Discussion and Possible Action to Adopt CDBG Subcommittee Recommendations for FY 2020 Community Agency Request for Proposals Funding

Action: M/S/C (Lord/Johnson) to recommend to City Council to support the CDBG subcommittee's recommendations for the FY 2020 Community Agency Request for Proposals, with an option to schedule a special meeting to discuss the funding recommendation further and amend the recommendation if necessary.

Vote: Ayes: Abdeshahian, Johnson, Lord, Simon-Weisberg, Wolfe, and Wright. Noes: Sharenko. Abstain: Tregub. Absent: Owens (excused) and Sargent (excused).

Action: M/S/C (Wright/Tregub) to extend the meeting one hour to 10:00pm.

Vote: Ayes: Abdeshahian, Johnson, Lord, Sharenko, Simon-Weisberg, Tregub, Wolfe and Wright. Noes: None. Abstain: None. Absent: Owens (excused) and Sargent (excused).

7. Discussion and Possible Recommendation on the Draft FY 2020 Annual Action Plan

Action: M/S/C (Wolfe/Tregub) to recommend the Draft FY 2020 Annual Action Plan to City Council for approval.

Vote: Ayes: Abdeshahian, Johnson, Lord, Sharenko, Simon-Weisberg, Tregub, Wolfe, and Wright. Noes: None. Abstain: None. Absent: Owens (excused) and Sargent (excused).

8. Presentation from Theo Ferguson, 1642 Milvia Street Condominium

9. Discussion and Possible Recommendation to Revise Code Enforcement Standards to Support Homeowners and Tenants

Public Speakers: 6

Action: M/S/C (Johnson/Tregub) to extend the meeting 30 minutes to 10:15pm.

Vote: Ayes: Abdeshahian, Johnson, Lord, Sharenko, Simon-Weisberg, Tregub, Wolfe and Wright. Noes: None. Abstain: None. Absent: Owens (excused) and Sargent (excused).

Action: M/S/C (Tregub/Wolfe) to recommend to City Council that it set in place the policies that would provide housing stability for homeowners and tenants. The City Council should set in place clear, objective, and equitable standards for conducting code enforcement actions and ensure that due process rights of affected homeowners and/or tenants are preserved. In addition, the HAC recommends that the City Council commission a formal fact-finding process to ascertain what occurred in the matter of Mr. Powell. It should also refer this matter to the City Auditor. The fact finding should, among other things, focus on any actions taken by the Receiver in the case of Mr. Powell and any communications that the City has had with the Receiver. The HAC recognizes that additional steps may be necessary in regard to this matter, and may forward additional recommendations to the City Council at a later date.

Vote: Ayes: Abdeshahian, Johnson, Sharenko, Simon-Weisberg, Tregub, Wolfe and Wright. Noes: None. Abstain: Lord. Absent: Owens (excused) and Sargent (excused).

10. Receive Update on the Bi-Annual Housing Policy Report Subcommittee

11. Discussion and Possible Action to Appoint a Subcommittee

12. Discussion and Possible Action to Adopt and Maintain an Annual Commission Calendar

13. Discussion and Possible Recommendation to Examine Urban Development Strategies Relative to IPCC Special Report on Global Warming

14. Discussion and Possible Recommendation to Coordinate Publically Supported Teacher Housing and Housing Discrimination Laws

15. Update on Council Items

16. Announcements/Information Items

17. Future Items

18. Adjourn

Action: M/S/C (Wolfe/Sharenko) to adjourn the meeting at 10:16 pm.

Vote: Ayes: Abdeshahian, Johnson, Lord, Sharenko, Simon-Weisberg, Tregub, Wolfe and Wright. Noes: None. Abstain: None. Absent: Owens (excused) and Sargent (excused).

Approved on March 13, 2019

_____, Mike Uberti, Acting Secretary



Health Housing and
Community Services Department
Housing & Community Services Division

MEMORANDUM

To: Housing Advisory Commission (HAC)
From: HAC CDBG Subcommittee
Date: March 7, 2019
Subject: **FY2020-2023 Community Agency Funding Recommendations**

This memo summarizes the application and review process, and presents recommendations from the HAC Community Development Block Grant (CDBG) Subcommittee to the full HAC for FY2020-2023 Community Agency Funding recommendations. Previously, the application review process occurred once every two years. However, for the first time, the City of Berkeley is implementing a four year contract cycle. Therefore, the recommendations contained in this memo reflect the amounts recommended for each of the following four fiscal years, with each year of funding contingent upon the availability of funds, particularly from the federal government.

Background: In November 2018 the City of Berkeley issued a Request for Proposals (RFP) for funding with CDBG and General Funds (GF), soliciting applications from non-profit community agencies. A RFP announcement and workshop Save the Date email was distributed via email on November 5th, 2018. The workshop took place on November 26th, 2018 and applications were due on January 4th, 2019 at 5pm. The Housing Advisory Commission participates each year in making recommendations to City Council regarding allocations of CDBG and City General Funds. It designates a CDBG Subcommittee to review and evaluate proposals and recommends funding for various projects.

The CDBG Subcommittee reviewed applications from agencies providing housing services and other public services, and agencies funded with General Funds providing workforce development. These services have been grouped into three sub-categories, 1) Public Services, 2) Housing Services, and 3) Public Facility Improvements.

The CDBG Subcommittee met three times and reviewed proposals from February through March 2019.

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FY2020 Available Funds: The City of Berkeley is anticipating \$2,626,329 in CDBG funding for FY2020, a slight decrease from the current year's allocation. CDBG program income is estimated to be \$250,531 and unexpended funds from prior years available for allocation is \$786,579, giving the City a total of \$3,663,440 in CDBG funds to allocate in FY2020. Unexpended prior year funds cannot be used for public services or planning and administration, both of which are capped funding categories. Carryover funds can be used, however, for housing services, community facility projects and the Housing Trust Fund.

The City of Berkeley also expects that the amount of General Funds (GF) available to the HAC will remain static from FY2019 to FY2020. However, when shifting to a four-year cycle, the City also proposed allocating \$25,000 per commission during the four year cycle to go towards hiring a consultant to improve agency outcome transparency. This results in \$6,250 less per year for the HAC's allocation. The resulting annual GF allocation for the HAC is \$232,229.

Funding for fiscal years 2021 – 2023 is projected to be the same as in FY2020. Should the amount of funding available in subsequent years be significantly different from FY2020, the HAC should plan on revising funding allocations in February or March during the Annual Action Plan allocations.

FY2020-2023 Applications & Review Process: In the Public Services category, seven applications totaling \$887,490 were received. In the Housing Services category, nine applications totaling \$1,884,341 were received but one was withdrawn leaving a total of eight applications totaling \$1,602,007. In the Public Facility Improvements category two applications totaling \$188,208 were received.

The CDBG subcommittee reviewed and developed funding recommendations based on information provided in agency proposals, performance evaluations, and additional clarifying information submitted by agencies.

Rationale for Preliminary Recommendations:

1. Public Services

The HAC CDBG subcommittee reviewed seven Public Services proposals and is recommending funding for four. Two of the un-funded programs are new to the City of Berkeley: 1) The Berkeley Music Group and 2) Gardner-Lee Workforce & Opportunity. The sub-committee felt that the Berkeley Music Group is a good program but not necessarily a good fit for this type of funding. Their main concern is that this program relies too heavily on placing students within their own organization. Gardner Lee's proposal did not score highly and the subcommittee did not find it to be a well thought out program. The sub-committee also proposes to defund ICS because of their high ask, low scoring proposal and services that are not consistent with those stated in the proposal.

2. Housing Services

Out of the nine proposals reviewed, one was withdrawn (CESC) and another was ineligible for CDBG funding due to poor past performance (Rebuilding Together). This left a significant void in the housing rehab category with Habitat for Humanity as the only remaining proposal to potentially fill that need. Therefore, the subcommittee recommends funding Habitat at their full ask. The subcommittee also recommends fully funding Bay Area Community Land Trust, CIL and the City of Berkeley administered programs.

3. Public Facility Improvements

With the exception of Rebuilding Together, which is ineligible for CDBG funding, the subcommittee recommends fully funding the City of Berkeley's community facility program. This program will be administered as a Notice of Funding Opportunity (NOFA). Should the amount of CDBG funding actually awarded be either higher or lower than projected, the difference or increase in funding would be allocated to the Community Facility NOFA funding for facility projects.

City staff are simultaneously preparing recommendations that will possibly be available on March 7, 2019. If the City Manager's final recommendations are not aligned with the HAC's, HCS staff hope to provide information about the variance at the HAC's March 7th, 2019 meeting.

Next Steps:

- Submit HAC final recommendations for Council consideration during the Annual Action Plan Public Hearing at the April 23rd, 2019 Council meeting.

Attached:

1. *FY20 Community Funding Recommendations, Summary of Recommendations Table*
2. *Community Development Block Grant (CDBG) Draft/Estimated Budget FY20*

Project Sponsor	Program Name	Type of Service	Funding Source	FY18/19 Allocation	FY20- Request	Commission Recommendation - Plan A
East Bay Community Law Center	Fair Housing	Fair Housing Services	CDBG	\$ 34,932	\$ -	
Eden Council for Hope and Opportunity	Fair Housing Services	Fair Housing Services	CDBG	\$ -	\$35,000.00	\$ 35,000
Berkeley Music Group	Education Program	Workforce Development - Skills Training	GF	\$ -	\$50,000.00	
Bread Project	Bakery Bootcamp: Job Training and	Workforce Development	GF	\$ 56,165	\$ 66,500	\$ 60,515
Gardner-Lee Workforce & Opportunity	Working With Opportunities, That	Workforce Development - Skills Training	GF	\$ -	\$150,000.00	\$ -
Inter-City Services (ICS)	Employment, Training & Education	Workforce Development	GF	\$ 101,643	\$ 203,286	\$ -
Resources for Community Development	Social Svcs & Special Needs Housing	Workforce Development	GF	\$ 9,828		\$ -
Rising Sun Energy Center	Green Energy Training Services	Workforce Development	GF	\$ 65,852	\$ 70,000	\$ 66,514
YMCA of the East Bay	YMCA Early Childhood Apprenticeship	Workforce Development - Skills Training	GF	\$ -	\$312,704.00	\$ 100,000
Public Services Sub Total				\$ 268,420	\$ 887,490	\$ 262,029
Habitat for Humanity East Bay	Housing Rehabilitation Grant Program	Single Family Housing Rehabilitation	CDBG	\$ -	\$250,000.00	\$ 250,000
Rebuilding Together East Bay	Safe Home Project	Single Family Housing Rehabilitation	CDBG	\$ 98,279	\$ 120,750	\$ -
Community Energy Services Corporation	Home Safety & Repair Program	Single Family Housing Rehabilitation	CDBG	\$ 282,334	\$ 282,334	\$ -
Center for Independent Living	Wheelchair, Ramp & Lift program	Single Family Housing Rehabilitation	CDBG	\$ 140,000	\$ 159,660	\$ 159,660
Bay Area Community Land Trust	Housing Co-op Training and Technical	Housing Services	GF	\$ 4,991	\$ 5,200	\$ 5,200
City of Berkeley Housing & Community Services Division	Loan Services	Housing Services	CDBG	\$ 67,386	\$ 70,008	\$ 70,008
City of Berkeley Housing & Community Services Division	Affordable Housing Development and	Housing Services	CDBG	\$ 464,072	\$ 488,341	\$ 488,341
City of Berkeley Housing & Community Services Division	Senior & Disabled Rehabilitation Loans	Housing Services	CDBG	\$ 340,566	\$ 358,048	\$ 358,048
City of Berkeley Housing & Community Services Division	SDRLP Loans	Housing Services	CDBG	\$ 150,000	\$ 150,000	\$ 150,000
Housing Services Sub Total				\$ 1,547,628	\$ 1,884,341	\$ 1,481,257
Rebuilding Together East Bay	Community Facility Improvement	Single Family Housing Rehabilitation	CDBG	\$ 24,575	\$ 35,300	\$ -
City of Berkeley Housing & Community Services Division	City of Berkeley Community Facility	Housing Services	CDBG	\$ 145,205	\$ 152,908	\$ 152,908
City of Berkeley Housing & Community Services Division	Community Facility RFP	Housing Services	CDBG	\$ 959,098	TBD	\$ 1,015,356
Public Facilities Sub Total				\$ 1,128,878	\$ 188,208	\$ 1,168,264
TOTAL				\$ 2,944,926	\$ 2,960,039.00	\$ 2,911,550.00

CDBG - Public Services (capped)	\$ 35,000	estimate	\$ 35,000
CDBG - Housing Services	\$ 2,644,321	estimate	\$ 1,476,057
GDBG - Facilities		estimate	\$ 1,168,264
GF - public & housing services	\$ 232,229	\$ -	\$ 232,229
Total	\$ 2,911,550		\$ 2,911,550

Community Development Block Grant (CDBG) PY2019 Allocations - HAC CDBG Sub. Committee Recs

REVENUES	Allocated FY19	Estimated FY20
CDBG Award	\$ 2,679,928	\$ 2,626,329
Program Income	\$ 381,150	\$ 250,531
Earlier Unused Funds	\$ 474,010	\$ 786,579
SUBTOTAL CDBG	\$ 3,535,088	\$ 3,663,440
GF Funding Available	\$ 238,479	\$ 232,229

EXPENDITURES - By Category	Allocated FY19	Estimated FY20
I. Housing Services	\$ 1,542,796	\$ 1,476,057
II. Public Services (17.83%)	\$ 453,853	\$ 453,921
III. Public Facility Improvements	\$ 765,303	\$ 1,168,264
IV. Planning & Administration (20%)	\$ 571,986	\$ 565,266
V. Housing Trust Fund	\$ -	\$ -
Total CDBG Funds Allocated/Requested	\$ 3,333,938	\$ 3,663,508

CDBG Project Details

I. CDBG - HOUSING SERVICES PROJECTS		Allocated FY19	Recommended FY20
CDBG			
1	Center for Independent Living: Residential Access Project for Disabled	\$ 140,000	\$ 159,660
2	Community Energy Services Corp.: Home Safety & Repair Program	\$ 282,334	\$ -
3	Rebuilding Together Safe Homes Project	\$ 98,279	\$ -
	Habitat for Humanity East Bay - Housing Rehabilitation Grant Program		\$ 250,000
4	COB HHCS: Loan Services	\$ 66,174	\$ 70,008
5	COB HHCS: Senior and Disabled Rehab Program	\$ 340,976	\$ 358,048
	Rehab Loans	\$ 150,000	\$ 150,000
6	COB HHCS: Affordable Housing Development and Rehab	\$ 465,033	\$ 488,341
	SUBTOTAL Housing Projects -- CDBG	\$ 1,542,796	\$ 1,476,057

General Fund		Allocated FY19	Recommended FY20
7	Bay Area Community Land Trust (GF)	\$ 4,991	\$ 5,200

II. PUBLIC SERVICES PROJECTS		Allocated FY19	Recommended FY20
CDBG			
8	Homeless Services (Berkeley Food & Housing Project)*	\$ 418,921	TBD
9	EBCLC: Fair Housing Counseling	\$ 34,932	\$ -
	EDEN Housing		\$ 35,000
	Total CDBG Public Services	\$ 453,853	\$ 453,921

General Fund		Allocated FY19	Recommended FY20
10	The Bread Project: Culinary Job Readiness Training	\$ 56,165	\$ 60,515
11	Inter-City Services: Employment, Education and Training	\$ 101,643	\$ -
12	Resources for Community Development: Social Svcs. at Special Needs Housing	\$ 9,828	\$ -
13	Rising Sun Energy Center: Green Energy Training Services	\$ 65,852	\$ 66,514
	Berkeley Music Group		\$ -
	Gardner-Lee Workforce & Opportunity		\$ -
	YMCA of the East Bay		\$ 100,000
	Subtotal GF Public Services:	\$ 233,488	\$ 227,029

* These projects are shown here for CDBG budgeting purposes, but are reviewed by other Commissions whose recommended funding level is reflected here.

III. CDBG - PUBLIC/COMMUNITY FACILITIES IMPROVEMENTS: Allocations or recommended funding is one-time only.

	Allocated FY19	Recommended FY20
14 Public Facilities 2018 - Mental Health Clinic	\$ 594,836	
15 Public Facilities FY2020*		\$ 1,015,356
16 COB HHCSD: Public Facilities Improvements	\$ 145,892	\$ 152,908
17 Rebuilding Together: Community Facilities Habitat for Humanity	\$ 24,575	
Subtotal Public Facilities Improvements:	\$ 765,303	\$ 1,168,264

* Should the amount of CDBG funding actually awarded be either higher or lower than projected, the difference or increase in funding would be allocated to the Public Facility projects line item

IV. CDBG - PLANNING AND ADMINISTRATION**

	Allocated FY19	Estimated FY20
18 COB HHCSD: CDBG Planning & Administration COB City Manager's Office: Support Costs	\$ 571,986	\$ 565,266
CDBG Planning & Administration TOTAL	\$ 571,986	\$ 565,266

**Set-aside. Planning and Administration is a capped category of CDBG funding. The City of Berkeley City Manager and Housing & Community Services Departments will utilize the maximum amount of funding available under this category.

V. HOUSING TRUST FUND

	Allocated FY19	Estimated FY20
City of Berkeley Housing Trust Fund	\$ -	\$ -

HOME Investment Partnership Program (HOME) Allocations

REVENUES	Awarded FY19	Estimated FY20
HOME Award	\$ 793,509	\$ 793,509
Program Income (projected)	\$ 20,000	\$ 20,000
SUBTOTAL HOME Funds Available	\$ 813,509	\$ 813,509

EXPENDITURES	Allocated FY19	Estimated FY20
Administration (10%)	\$ 81,351	\$ 81,351
CHDO Operating Funds (5%)	\$ 28,115	\$ 28,115
Available for HTF Projects	\$ 684,043	\$ 684,043
Total	\$ 793,509	\$ 793,509

Emergency Solutions Grant (ESG) Allocation SUMMARY

REVENUES	Awarded FY19	Estimated FY20
ESG Award	\$ 219,480	\$ 219,480

EXPENDITURES	Allocated FY19	Estimated FY20
Rapid Rehousing*	\$ 196,343	\$ 196,343
Homeless Management Information System	\$ 6,676	\$ 6,676
Administration (7.5%)	\$ 16,461	\$ 16,461
Total	\$ 219,480	\$ 219,480

* Funding will be allocated to the Coordinated Entry System to carry out the program.

FY19 amount %
4,366,927 #REF! #REF!

Uberti, Michael

From: Alice La Pierre <energyqueen@earthlink.net>
Sent: Monday, March 11, 2019 4:49 PM
To: Housing Advisory Commission
Cc: albertanph@yahoo.com; bauerbill@gmail.com; greg@vanmechelenarchitects.com; linda@lnovick.com; LindaKEpley@gmail.com; suzannayeh@gmail.com; timothy pakes@gmail.com
Subject: Rebuilding Together East Bay-North
Attachments: Q4 FY 2017-18.pdf; Jessica Keahey's Resume.pdf; 20190309.Letter to HAC .pdf

Dear HAC Members,

Please find the following attachments:

- Letter to HAC
- Resume for Jessica Keahey, Non-Profit Bookkeeper
- Sample of 4th Quarter Financial Report

We appreciate your review of our letter and supporting documentation. We have served the senior low income and disabled community, including BORP and Berkeley's Senior Centers for 28 years, and we hope that this will continue with City of Berkeley support.

We will be in attendance at the HAC meeting on Wednesday night, and look forward to answering any additional questions then.

With gratitude,

Alice La Pierre, Board President
Suzanna Yeh, Vice President
Albert Nahman, Secretary
Timothy Pakes, Treasurer
Greg Van Mechelen, Architect
Bill Bauer, Retired Engineer
Linda Epley, Retired Attorney
Linda Novick



3318 Adeline Street, Berkeley, CA 94703
(established as "Christmas in April in 1996)
www.RTEBN.org

Tax ID#: 94-3238591

March 9, 2019

To: Members of the Housing Advisory Commission

From: Alice La Pierre, Board President, Rebuilding Together East Bay-North (RTEBN)

I am writing to appeal to you to restore CDBG funding to our organization.

We would like to clear up any misinformation about our organization which may be out of date, and which may have influenced your decision to stop funding RTEBN.

In late spring of 2016, we hired an Executive Director under emergency circumstances, when our previous one resigned to take a job in her field (social work) a five-minute walk from her home in San Francisco. We were poised to begin our massive spring rebuilding projects, and needed someone to oversee things. After interviewing a dozen candidates, we hired a person who had the background experience needed for the job. Her references checked out.

Our Board members spent a lot of time getting her up to speed, and familiar with our grant requirements including filing reports in CDS, reviewing payroll requirements, insurances, and training sessions with our then-bookkeeper. We tried to give her time to get comfortable with the work. She often assured us that she only had "a little paperwork to complete," each time we asked how things were going. No one from the City let the Board know that we were behind in our filing, until December 2017.

When the Board realized that she had not been filing the quarterly reports with the City, we quickly made the decision to terminate her. We discovered that she had not been working with the bookkeeper before he resigned, and that four critical months of expenses and deposits had not been entered into Quickbooks. The Board members filed our reports the best we could. The Board had no access to Quickbooks, since the password locked us out. We were confident that no money was missing, however, since we had photocopies of checks, which matched the bank statements and donor thank-you letters.

We immediately hired a bookkeeping service to pull things together. Because they were the same firm that another CDBG recipient in Berkeley was using, we expected them to be able to pick

things up and bring us up to date, but they seemed unable, and were difficult for us to work with. We couldn't understand why.

We advertised for a new bookkeeper, and found one who specializes in working with non-profits who are in similar straits as ours. We hired Ms. Jessica Keahey as an outside contractor in April 2018. In a few days of reviewing our records, Ms. Keahey was able to determine why we had trouble with the bookkeeping service.

Ms. Keahey was instrumental in digging quickly, and deeply, into our bookkeeping system. There were some fundamental flaws with our original Chart of Accounts, and it appeared that we were using the wrong version of Quickbooks. She fixed all of these things, creating a new, accurate Chart of Accounts, standardizing things like check request forms, and set up our books in the Non-Profit versions of Quickbooks, which produced better reports for our needs. She prepared all the files we need for our reports in CDS, and our State and Federal tax forms. She re-organized our internal filing system so that we could find things more quickly. She is a "systems" person, and we have benefited from her great attention to detail.

When we were audited by the Housing Department staff for the 4th Quarter of 2017, RTEBN's Board took full responsibility for the situation. With Ms. Keahey's assistance, we produced all documents requested, from financial reports to the guiding documents for our Board of Directors. We produced time sheets and payroll records, expense receipts and bank statements, plus all parts of our client files, such as proof of income, home ownership, homeowner's insurance and property tax receipts. Other than receipts, everything proved to be in order.

We complied with all requests from the Housing Department promptly, and shared all files requested. In the process, we also uncovered a number of misfiled receipts which helped sort out the bookkeeping further, and reduced our damages. We responded to follow-up questions for the audit to the satisfaction of the City. When the results of the audit came back to us, we paid the recaptured funds, which we had on hand from other unrestricted funds we had received, including donations from our Board of Directors.

Without Ms. Keahey's help, it is understandable that you would hesitate to fund Rebuilding Together East Bay-North. But she has righted our ship. She produces our financial reports so that we file our Quarterly reports with the City in CDS in a timely way, and has made it possible for us to be up to date on everything, including our most recent State and Federal tax filings. She has just committed to working with us permanently, and we are about to file a Letter of Understanding with the bookkeeping firm she has taken over, Robin Braverman Associates. Established in 1985, Robin Braverman Associates (RBA) offers bookkeeping and other fiscal management services for non-profit organizations. They also provide workshops and training in fiscal management for non-profit directors and accounting personnel. This is a good partnership for us.

RTEBN has a full board, staffed by professionals including an architect, engineer, plumbing contractor, attorney, software company owner, and other professionals. The Board meets every month, produces an agenda and minutes, and maintain these records electronically. We are fully insured, responsible, and organized, and this year, we will exceed the number of homes and facility projects required by our current CDBG grant by 30% because our program staff are doing an amazing job of recruiting professional contractors and trades people, and soliciting in-

kind donations. We are doing bigger, more expensive projects than ever before, including roof replacements and foundation work, especially since Community Energy Services Corporation is now closing its doors.

We are primed to grow further, to increase our services, and help more people, but we would suffer a major setback if we were to lose the CDBG funding. We are proud of the good work we have done for the past 28 years, and our partners, including our volunteers, Lawrence Berkeley National Lab, PG&E, Youth Spirit Artworks, The Women's Daytime Drop-In Center, Red Oak Realty and the Berkeley Association of Realtors, find us worthy of their partnership. We hope that the City of Berkeley will also have confidence in us to serve our home community.

JESSICA KEAHEY

Profile

I am passionate about helping people and love to excel in every area of my life. I love working in a team and believe in leading by example. I have spent the last 10+ years working in organizations with goals I can believe in, and put my all into. As a result I have many well rounded skills that make it possible for me to do well in whatever I put mind to.

Skills

Administrative: Proficient in using both Mac and PCs, Microsoft Office: Excel, Word, Outlook, etc.

Non-profit Accounting skills: QuickBooks, Cost Allocation, and Restricted Money

Technology Savvy: Dropbox, Google Docs, Website Management, Quark, In Design, Photoshop, and Blackbaud

Other skills: Customer Service, Public Speaking, Fundraising, and Event Planning

Experience

Office Manager for **Global Strategies** Albany, CA - June 2016 to present

Global Strategies is a 501(c)(3) non-profit built to empower communities in the most neglected areas of the world to improve the lives of women and children through healthcare.

Responsibilities:

- Accounting: Enter Account Payables, Account Receivables, prepare reconciliations, process payroll, manage depreciation and prepaid schedules, prepared 1099s, assist in outgoing grants management, grant reporting, audit and 990 preparation and budgeting.
- Other primary responsibilities: Trip planning, website management, social media management, Newsletter coordination
- Areas I provide assistance: Fundraising, submitting research papers to Journals, NoviGuide (app) testing, organizing program statistics.

Associate for **Robin Braverman Associates** Oakland, CA - October 2013 to present

Robin Braverman Associates is an agency that provides accounting services and financial consulting services to non-profit organizations.

Responsibilities:

- Enter Account Payables, Account Receivables, reconcile bank accounts, process payroll, and produce financials.
- Produced 1099s for clientele

Manager of Administration for **Stagebridge** Oakland, CA - November 2015 to July 2016

Stagebridge is a 501(c)(3) non-profit Senior Theatre Company that allows older adults to continue to keep their minds and bodies active while bridging the gap to youth in our communities through Storytelling.

Responsibilities:

- Accounting: Enter Account Payables, reconcile bank accounts, process payroll, produce financial statements, and supervise over the entering of Account Receivables.
- Human Resources: Developed an Employee handbook and Implemented a process of Employee files. I was responsible for all new hire paperwork and ensuring we were in compliance with the law.
- Developed and maintain a complete filing system including grant tracking.
- Responsible for all preparation and coordination with the annual auditors.

Executive Assistant for **Peralta Colleges Foundation** Oakland, CA - August 2013 to October 2015

Peralta Colleges Foundation is a 501(c)(3) non-profit organization that provides scholarships to students.

Responsibilities:

- Managed all of the Foundation's scholarships, program funds and donor relations
- Built and maintained the online scholarship application process, including creating the application, managing reviewers, developed and trained in use of a scoring rubric.
- Accounting: Designed the tracking of payroll, and allocations for staff, as well as a complex tracking methodology for how the Foundation will maintain its Permanently Restricted funds. Maintaining cash positions and entered bills.
- Developed and implemented a filing system for the Foundation, in addition to creating numerous spreadsheets to track different forms of information.
- Managing the Foundation's website making changes, updates and adding new information.

Education: Associate's Degree in Accounting - Berkeley City College, Berkeley, CA

References: Excellent references are available.

12:10 PM

Rebuilding Together East Bay-North

Statement of Activities

07/04/18

April through June 2018

Accrual Basis

	<u>Apr - Jun 18</u>
Total 6080 · Occupancy	3,886.70
6100 · Project Expenses	
6101 · Building Materials & Supplies	13,023.82
6102 · Building Equipment Rental	507.78
6103 · Dumpsters/Trash	1,734.00
6107 · Permits	547.68
6110 · Tools	146.90
Total 6100 · Project Expenses	<u>15,960.18</u>
6200 · Volunteers	
6201 · Volunteer Support	
6205 · Other Volunteer Support	286.04
6203 · Volunteer Support -Tshirt/Gifts	1,930.73
6204 · Volunteer Support - Service	556.96
Total 6201 · Volunteer Support	<u>2,773.73</u>
Total 6200 · Volunteers	2,773.73
6300 · Office Expenses	
6301 · Office Supplies	37.12
6302 · Postage and Delivery	
6303 · Postage	50.00
Total 6302 · Postage and Delivery	<u>50.00</u>
6306 · Telephone & Internet	387.14
6348 · Miscellaneous	6.82
Total 6300 · Office Expenses	<u>481.08</u>
6400 · Insurance	
6401 · General Liability	86.00
Total 6400 · Insurance	<u>86.00</u>
6500 · Dues, Subscriptions & Fees	
6510 · Licenses & Government Fees	
6511 · Taxes & Licenses	25.00
Total 6510 · Licenses & Government Fees	<u>25.00</u>
Total 6500 · Dues, Subscriptions & Fees	25.00
7000 · Depreciation Expense	368.29
Total Expense	<u>42,209.12</u>
Net Ordinary Income	<u>-22,413.51</u>
Net Income	<u><u>-22,413.51</u></u>