



July 25, 2018

TO: LOCSD Board of Directors  
FROM: Renee Osborne, General Manager  
SUBJECT: **Agenda Item 7A – 8/2/2018 Board Meeting**  
Recommendation Regarding the Los Osos Low Income Assistance Fund

**President**  
Vicki L. Milledge

**Vice President**  
Marshall E. Ochylski

**Directors**  
Charles L. Cesena  
Louis G. Tornatzky  
Christine M. Womack

**General Manager**  
Renee Osborne

**District Accountant**  
Robert Stilts, CPA

**Unit Chief**  
Scott M. Jalbert

**Battalion Chief**  
Greg Alex

**DESCRIPTION**

Staff recommended direction on next step regarding the Los Osos Low Income Assistance Fund, Phase 2.

**STAFF RECOMMENDATION**

***Motion: I move that the Board accept the ten applicants for financial assistance through the Los Osos Low Income Assistance Fund and to proceed with acceptance letters and construction of the sewer laterals.***

**SUMMARY**

We have received a total of twelve applications for financial assistance with their sewer lateral. Applications were reviewed by Lisa Gonzalez and myself. Per the Housing and Urban Development (HUD) low income standards, eleven applicants met the low income threshold and were eligible for assistance, however, one applicant was looking for a reimbursement which disqualified them from our program.

We started with a balance of \$169,015.64 in the Community Foundation-Los Osos Low Income Assistance Fund. I have asked the Community Foundation for a total of \$40,000 of the funds to be transferred into the Low Income Assistance Fund account (Pacific Premier). We have spent a total of \$18,160 of the funds for Phase 1; \$21,840 remains in the Pacific Premier account. In addition, staff time and expenses from Phase 1 to July 24<sup>th</sup> are \$1,526.30.

Since it is a lengthy process to ask for funds through the Community Foundation, I will start the process for an additional \$10,000 to help cover the costs of the ten sewer laterals.

**RECOMMENDATION**

Staff is requesting the Board's acceptance of the ten applications for financial assistance and to proceed with the grant acceptance letter for construction of sewer laterals.

Attachments

**Mailing Address:**  
P.O. Box 6064  
Los Osos, CA 93412

**Offices:**  
2122 9<sup>th</sup> Street, Suite 102  
Los Osos, CA 93402

**Phone:** 805/528-9370  
**FAX:** 805/528-9377

www.losososcsd.org

**LOS OSOS LOW INCOME ASSISTANCE FUND  
APPLICANTS FOR PHASE 2**

Phase 2	Annual Income	Persons in Family	Eligible	Notes
Applicant #09	\$13,272	2	Y	Brother lives in home, unemployed
Applicant #10	\$21,602.00	1	Y	
Applicant #11	\$37,407.00	1	Y	
Applicant #12	\$58,174.00	3	Y	One income only
Applicant #13	\$26,788.00	3	Y	Mom = \$11,188; Dad = \$15,600
Applicant #14	\$31,191.80	3	Y	Dad = \$13,489; Son = \$1300; Mom = \$16,402.80
Applicant #15	\$19,896.00	1	Y	
Applicant #16	\$52,991.00	1	N	Over limit by \$6,311
Applicant #17	\$34,314.00	1	Y	
Applicant #18	\$21,239.00	1	Y	
Applicant #19	\$9,376.00	1	Y	
Applicant #20	\$11,664	1	N	Has already paid for sewer lateral; looking for possible reimbursement



# FY 2018 INCOME LIMITS DOCUMENTATION SYSTEM

[HUD.gov](http://HUD.gov) [HUD User Home](#) [Data Sets](#) [Fair Market Rents](#) [Section 8 Income Limits](#) [MTSP Income Limits](#) [HUD LIHTC Database](#)

## FY 2018 Income Limits Summary

Selecting any of the buttons labeled "Explanation" will display detailed calculation steps for each of the various parameters.

FY 2018 Income Limit Area	Median Family Income	FY 2018 Income Limit Category	Persons in Family							
			1	2	3	4	5	6	7	8
<b>San Luis Obispo-Paso Robles-Arroyo Grande, CA MSA</b>	\$80,600	Very Low (50%) Income Limits (\$)	29,150	33,300	37,450	<b>41,600</b>	44,950	48,300	51,600	54,950
		Extremely Low Income Limits (\$)*	17,500	20,000	22,500	<b>25,100</b>	29,420	33,740	38,060	42,380
		Low (80%) Income Limits (\$)	46,600	53,250	59,900	<b>66,550</b>	71,900	77,200	82,550	87,850

**NOTE:** San Luis Obispo County is part of the **San Luis Obispo-Paso Robles-Arroyo Grande, CA MSA**, so all information presented here applies to all of the **San Luis Obispo-Paso Robles-Arroyo Grande, CA MSA**.

The **San Luis Obispo-Paso Robles-Arroyo Grande, CA MSA** contains the following areas: San Luis Obispo County, CA;

\* The FY 2014 Consolidated Appropriations Act changed the definition of extremely low-income to be the greater of 30/50ths (60 percent) of the Section 8 very low-income limit or the poverty guideline as established by the Department of Health and Human Services (HHS), provided that this amount is not greater than the Section 8 50% very low-income limit. Consequently, the extremely low income limits may equal the very low (50%) income limits.

Income Limit areas are based on FY 2018 Fair Market Rent (FMR) areas.



**December 31, 2017**

**Los Osos Community Services District Community Fund**

**Statement of Fund Activity**

	Semi-Annual	Year To Date
<b>Beginning Fund Balance</b>	<b>169,015.64</b>	<b>169,015.64</b>
<b><u>Plus:</u></b>		
Gifts	0.00	0.00
Dividends and Interest	0.00	0.00
Realized Gains/Losses	0.00	0.00
Unrealized Gains/Losses	0.00	0.00
Other Income	0.00	0.00
<b>Total Revenue</b>	<b>0.00</b>	<b>0.00</b>
<b><u>Less:</u></b>		
Grants	0.00	0.00
Administrative Fees	0.00	0.00
Investment Management Fees	0.00	0.00
Other Expenses	0.00	0.00
<b>Total Expenses</b>	<b>0.00</b>	<b>0.00</b>
<b>Ending Fund Balance</b>	<b>169,015.64</b>	<b>169,015.64</b>



PACIFIC PREMIER BANK

P.O. Box 25171
Santa Ana, CA 92799-9810

STATEMENT OF ACCOUNT ACTIVITY

866-353-1476
www.ppbi.com

00006531-0013061-0001-0001-TIMR8006410629185063

Stamp: JUL 09 11:00 AM
BY: [Signature]

LOS OSOS COMMUNITY SERVICES DISTRICT
LOW INCOME ASSISTANCE FUNDS ACCOUNT
PO BOX 6064
LOS OSOS CA 93412-6064

Page 1 of 1
Branch 033
Account Number: [Redacted]
Date 06/29/18

EM

We have improved our monthly statement format to help you with
faster account balancing. Your account activity will be grouped
by transaction type each month. The Summary of Activity section
remains unchanged.

EXECUTIVE 250 CHECKING

Acct [Redacted]

Summary of Activity Since Your Last Statement

Table with 3 columns: Description, Date, Amount. Rows include Beginning Balance (6/01/18, 21,840.00), Deposits / Misc Credits (0, .00), Withdrawals / Misc Debits (0, .00), \*\* Ending Balance (6/30/18, 21,840.00\*\*), Service Charge (.00), and Average Collected Balance (21,840).

00006531-0013061-0001-0001-TIMR8006410629185063(00006531)-000013063

