



2021 Annual Report



Building community from the heart

PEP Housing is a non-profit corporation dedicated to providing seniors with limited incomes access to affordable quality housing with supportive services and advocacy.



Executive Director's Message



What a year it has been...

Navigating a pandemic while trying to protect vulnerable residents and staff was uncharted territory for us here at PEP. Our number one priority was to keep people safe and connected. From day one, we organized our team to protect residents and address social isolation during a pandemic that stretched on much longer than any of us anticipated. The following is a small sampling of the services we provided our residents during the pandemic.

VACCINATIONS

In October 2020, we learned that HUD supported properties would be prioritized for vaccinations. Unfortunately, only a handful of our properties had made the final cut on the governments' list of properties. Scheduling hundreds of vaccinations at 18 properties was a monumental task and several times the clinics were delayed for a variety of reasons. Executive Director, Mary Stompe, estimated spending more than 100 hours arranging these clinics. Clinics were held in PEP properties' community rooms, making vaccines readily available and accessible to all our residents and staff. We were happy to report that many properties succeeded in having 90%+ vaccination rates.

ADDRESSING SOCIAL ISOLATION

Addressing social isolation is something our Resident Service Coordinators do on a regular basis. Add a pandemic to the mix and this became a top priority for PEP, as it exacerbated this condition among residents. We took a multi-faceted approach to this challenge and provided a variety of programs including:

- **Digital devices** – By providing digital devices and training, it allowed residents to stay in touch with their families, friends and other service providers.
- **Safety checks** – During the early stages of the pandemic, Property Managers and Service Coordinators frequently checked in with residents, calling regularly and providing safety checks throughout the course of the pandemic.
- **Quilting for a cause** – Several communities and staff participated in collaborative quilting projects which were later auctioned off to raise funds for PEP Housing.
- **Creative Spark** – In collaboration with Ruth's Table (COVIA), we were able to provide art classes for six weeks, providing free supplies and materials.
- **Virtual offerings** – PEP partnered with the Fenwick Foundation for virtual offerings in areas of interest such as music, art, dance and theater. The Fenwick Foundation donated gift cards for a gardening project in which supplies were purchased and provided to communities.

- **Google Home Speakers** – Our partnership with Area Agency in Aging brought donations of Google Home Speakers, Matter of Balance classes and a workshop on how to access CalFresh benefits at local farmer's markets.
- **Fitness classes** – We provided chair yoga, meditation, life enrichments classes and a support group facilitated by a licensed therapist.
- **Food Distribution** – During the pandemic, we increased food distribution and access by delivering supplemental groceries door-to-door so residents could safely shelter in place. PEP provided grocery gift cards to residents in all our communities thanks to the generosity of the Community Foundation of Sonoma County.
- **Care packages** – We lifted residents' spirits with gift bags, potted succulents, handmade cards, fresh flowers and assorted care packages.
- **Music** – We organized socially distanced outdoor performances that included musical bands, dance groups and a piano performer in several communities.
- **Megaphones** – We purchased megaphones for residents to tell jokes, say hellos, etc. at safe distances.

Statistics at a glance

A total of 32,676 services were provided to our residents from 7/1/20 – 6/30/21, an equivalent of 7.71 services per resident.

We served a total of 484 out of 551 residents or 89% of our residents.

The highest number of services provided include outreach, 482, isolation intervention, 465, general information and referral, 431, monitoring services, 462, and benefits, 381.

Thank you PEP Housing Resident Services Department!

Mary Stompe, PEP Housing's Executive Director



Our Staff at a Post-COVID BBQ

About PEP Housing

PEP Housing began as a small, all-volunteer organization formed by dedicated local civic leaders and clergy who joined forces to respond to the urgent need of local seniors nearly homeless and living in appallingly substandard conditions. Now, 551 seniors reside in the 18 beautiful PEP Housing communities widely recognized for excellence in eco-friendly development and service-enriched programs. Today, the demand continues to grow, and PEP Housing is responding with several other projects in construction and pre-development.

Accomplishments 2020 – 2021

- 1 Our greatest accomplishment was getting through a pandemic and keeping our staff and residents safe and engaged.
- 2 PEP was selected as the Affordable Housing Company to purchase Vigil Light, a 49-unit senior community on a beautiful 4-acre campus in Northeast Santa Rosa. Thanks to Enterprise and LIIF (Low Income Investment Fund), who provided the bridge loan, we plan to rehabilitate the nearly 30 year-old property in the next 2-3 years.
- 3 We secured the necessary financing for both River City Senior Apartments in Petaluma and Pony Express Senior Apartments in Vacaville and started construction on both projects.
- 4 After multiple attempts to secure County of Sonoma and City of Santa Rosa funding for the Linda Tunis project, we were successful in obtaining CDBG-DR from the City and the County Fund for Housing.

2021 Board of Directors

Sean Pryden, *President*
 George (Kip) Spragens, *Vice President*
 Ben Pryden, *Treasurer*
 Mary Savage, *Secretary*
 Mary Stompe, *Assistant Secretary*
 Sid Lipton
 Art Cooper
 Anna Rose
 Joseph Tinney
 Harry Coffey
 Don Ross
 Jeff Mayne

Executive Staff

Mary Stompe, *Executive Director*
 Dominic Roybal, *Director of Property Management & Compliance*
 Jim Wallen, *Director of Development*
 Sharon Patchin, *Director of Human Resources*
 Pam Lemos, *Director of Maintenance*



**Our vision:
To build quality
affordable homes
for seniors and
veterans in need.**

595 Seniors in need of affordable housing are on our waitlist!

PEP has **18 Senior Communities**
plus 2 in construction and 1 soon to be in construction

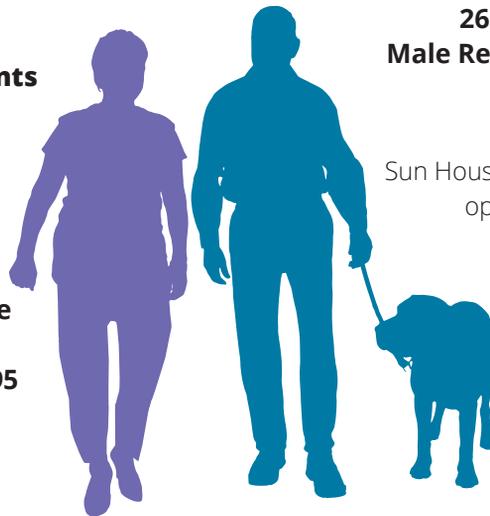


551 Total Residents

74%
Female Residents

26%
Male Residents

Ages: Female & Male
Average Age: **77**
Our Oldest Resident: **95**



28 Veterans

Sun House, our very first Veterans property,
opened August 2017 in Ukiah

PEP is pet-friendly!
68 of our residents
are pet owners or
have service animals

Resident Demographics

**25% of our residents volunteer at our properties
or in the community.**

Asian • Black • Hawaiian/Pacific Islander
Hispanic • Native American • White

2020 Services provided by Resident Service Coordinators:

- Advocacy: 17
- Assessment: 66
- Benefits: 4886
- Case Management: 42
- Conflict Resolution: 52
- Education: 1052
- Fair Housing: 28
- Family Support: 38
- General Information & Referral: 3773
- Health Care Services: 3709
- Home Management: 145
- Homemaker: 69
- Isolation Intervention: 7210
- Lease Education: 32
- Legal Assistance: 25
- Meals: 2299
- Mental Health Services: 314
- Monitoring Services: 3401
- Other: 295
- Outreach: 10,420
- Resident/Tenant Councils: 75
- Support Counseling: 687
- Tax Preparation Services: 1
- Translation: 6
- Transportation: 11

2020 Audited Figures



Program Services

□ 58%	Resident Services & Program Operations.....	\$2,786,820
■ 17%	Maintenance.....	\$838,452
■ 11%	Utilities.....	\$522,041
■ 14%	Taxes, Interest & Insurance	\$694,180
	Total	\$4,841,493

** Excludes Depreciation & Amortization*

COMBINED STATEMENT OF ACTIVITIES

Revenue

□ 78%	Rental Property Income.....	\$4,452,546
■ 3%	Outside Property Management fees.....	\$146,696
■ 17%	Grants, Donations & Fundraising*	\$953,999
■ 1%	Net Assets Released From Donor Restrictions ...	\$57,429
■ 2%	Other	\$98,248
	Total Revenue	\$5,708,918

**The majority of this was for restricted projects*

Expense

■ 89%	Program Expenses*.....	\$4,841,493
□ 1%	Fundraising & Advocacy.....	\$77,157
■ 10%	Management & General	\$531,365
	Total Expenses	\$5,450,015

**Excludes Depreciation & Amortization*



Tablets for Residents Program



Who has a seat at the table — Our Board Members

IRS Manager • Banker – 2 • Pharmacist • Contractor • PEP Resident • Attorney • Mortgage Broker • Merger Acquisitions Broker • Real Estate Finance
Average tenure on the Board: **11 years**

Where our Board Members live

Petaluma, Rohnert Park, Santa Rosa & Windsor

Employment at PEP

Employee age range: **29-74** • Average age: **55** • Longest years at PEP: **17**

Years employed at PEP

10 YEARS OR MORE

15 YEARS OR MORE

3 employees

4 employees

Honoring Our Board Members



The Herb Lee Senior Apartments

Daniel Drive Senior Apartments, PEP Housing's first property, was renamed the Herb Lee Senior Apartments in honor of Herb Lee who served on PEP Housing's Board of Directors and as the Chair of the Administrative Committee for 17 years. Herb's commitment and dedication to PEP Housing was extraordinary. His

attention to detail and his keen wit will be greatly missed. Herb passed away on February 22, 2021, three months shy of his 95th birthday.

The Don Bennett Senior Apartments

Lindberg Lane Senior Apartments was renamed the Don Bennett Senior Apartments. Don joined the PEP Housing Board of Directors in 2004. He served as Nominating Chair until 2017. Don's expertise and experience in development was a great resource for PEP Housing for 13 years. Don passed away in May 2017 at the age of 79.



IN RECOGNITION OF OUTSTANDING SERVICE TO PEP HOUSING

RICHARD RODKIN

Richard Rodkin led the organization and served in leadership roles for ten years, starting as VP in 2010, President 2011 - 2013, VP 2014 - 2016, President again in 2017, then VP again 2018 - 2019. As a Sound Engineer, Rich's background made him well suited to serve on PEP Housing's Housing Development Committee. He made thoughtful contributions to every new development and took a great interest in actively participating in construction. Rich retired from the Board in 2020 after an incredible legacy. We found it only fitting to recognize his outstanding achievements and steadfast leadership, making PEP Housing the organization it is today. At River City Senior Apartments, a 54-unit project under construction in Petaluma, a stunning building with views of the Petaluma River, we will name the Community Room **The Richard Rodkin Community Room**. Thank you, Rich, for your leadership, dedication and talents.

ARTHUR COOPER

Art Cooper has been a Board member with PEP Housing for 16 years and 12 years as an Officer. He served as President of the Board in 2014, 2015, 2016, 2018, 2019 and 2020. He served as Vice President in 2017, 2013, 2012 and 2009. He served as Treasurer in 2010 and 2011. Art is still an active member of the Board of Directors. Art's background with the Internal Revenue Service has made him an excellent resource for all things finance. Art has been a steadfast supporter of the organization and has been incredibly generous with his time helping the organization grow and prosper. In honor of his service to PEP, we will be naming the Community Room at 575 Vallejo Street **The Cooper Community Room**.

Resident Activities in 2020 and 2021



Ice Cream Social



Creative Spark



Mosaic Art



Rock Painting Party



Bingo!



Valentines for Residents

COVID 19 VACCINATION CLINICS AT PEP HOUSING

Clinics were held in PEP properties' community rooms, making vaccines readily available and accessible to all our residents and staff. We are happy to report that many properties succeeded in having 90%+ vaccination rates.





Visit us at pephousing.org to find out how you can donate to PEP Housing.

PROJECTS IN CONSTRUCTION



River City Senior Apartments – Petaluma, CA

Construction at River City Senior Apartments is humming along, and the project's buildings are taking shape. The project will provide homes to 53 seniors and senior veterans and is located at the south end of Petaluma Boulevard, along the Petaluma River. A public pathway with benches along the riverfront providing views of Sonoma Mountain to the east is adjacent to a community patio and barbecue for residents to enjoy. PEP's first Wellness Center, where health care professionals can meet with residents onsite, is sure to be a well utilized and welcomed amenity. The project is on track to complete construction in February 2022.

Pony Express Senior Apartments – Vacaville, CA

We are thrilled to announce that construction has commenced at Pony Express Senior Apartments, in Vacaville. This project will provide quality affordable homes to 59 seniors and seniors experiencing homelessness, with Lutheran Social Services of Northern California providing case management services for vulnerable seniors. The project will include raised community garden beds, a community center with full kitchen, computer room, dog run and a Wellness Center onsite. Pony Express Senior Apartments will be PEP's first development in Solano County and construction is projected to be complete in February of 2023.



Treasurer Fiona Ma presents Certificate of Recognition to PEP Housing.

PROJECTS IN PRE-DEVELOPMENT

Linda Tunis Senior Apartments – Santa Rosa, CA

Linda Tunis Senior Apartments is a rehabilitation project converting the former Santa Rosa Scottish Rite Center into 25 studio apartments for seniors, with priority given to those impacted by the fires of years past or any federally declared disaster. The property is adjacent to our Acacia Lane Senior Apartments property, and we will be retaining the former event center's large dining hall and commercial kitchen for use by PEP residents' activities and gatherings. The project is nearly fully funded, and we anticipate starting construction in the fall of 2021. A second phase of housing on the Acacia Lane property is beginning pre-development for the new construction of more than 60 additional units.

New to PEP's Real Estate Portfolio:

Vigil Light Senior Apartments – Santa Rosa, CA

PEP Housing has purchased Vigil Light Apartments, an existing affordable senior housing community in the Proctor Terrace neighborhood of Santa Rosa. The property contains 49 units consisting of (36) 1- bedroom and (12) studio units on 4 acres and is known as one of the most desirable senior housing projects in the area. We will be rehabilitating the property in 2023, improving energy efficiency, modernizing and refreshing resident's interiors as well as the exterior of the property and its beautiful park-like grounds. We are proud to have brought Vigil Light Senior Apartments into our portfolio of quality affordable senior housing.

