



PEPHousing
Celebrating 45 years!



**What if every senior and veteran could have
a place to call home?**

2022 Annual Report



Building community from the heart

PEP Housing develops and manages affordable housing and provides
services for older adults with limited incomes.



Executive Director's Message



This year I celebrated my eighteenth anniversary with PEP Housing. It has been an incredible journey. We had great successes with the grand openings of two properties: River City and Linda Tunis Senior Apartments. Despite challenges such as COVID, supply chain delays, increased costs, labor issues, etc., we managed to complete construction and add an additional eighty units to PEP Housing's portfolio. When Pony Express Senior Apartments is completed in early 2023, we will add a total of one hundred and forty units that will house our vulnerable older population.

We officially changed our legal name to PEP Housing, our doing business as name (DBA) for nearly twenty years. PEP is now operating in five counties: Sonoma, Marin, Butte, Mendocino, and Solano, but we will never forget our roots as an all-volunteer organization started by clergy and community leaders to provide housing for seniors on a limited income. We have fourteen properties in Petaluma, the City that is still near and dear to our hearts. We remain committed to our mission of serving seniors and veterans with limited incomes.

As we start our 45th year of operation, we will have twenty-one communities, and we have more work to do. With a seven-year wait for housing, it is difficult to meet the demand. It is time to be more creative in our approach to building housing such as rehabilitating existing buildings. We took a building that could easily have become blight in the community and transformed it into affordable housing. The cost to purchase and rehab a building was nearly 35% less than new construction.

We had a great year with our Resident Services. We were the only organization in the country to pilot the CAPABLE Program in rural areas and multi-family settings, a program developed by John Hopkins University. Selected residents work one on one with an Occupational Therapist, a Nurse, and our maintenance team to develop personalized plans, allowing our residents to live independently longer. We partnered with the Rural Housing Association to bring this project to fruition. Additionally, we are rolling out the Senior Planet program, a technology program developed by AARP.

This year we housed thirty-nine homeless seniors, many who had nothing when they moved in. Thanks to a grant from the Community Foundation of Sonoma County, we were able to purchase beds and bedding for our residents who had previously been homeless.

In closing, we have much more to do to meet the needs of our older Americans. Together, we can work towards achieving our goal of providing housing to every senior that needs a place to call home.

Mary Stompe, PEP Housing Executive Director

“Together, we can work towards achieving our goal of providing housing to every senior that needs a place to call home.”

We changed our name but not who we are. We've been using PEP Housing for many years as our DBA. We officially changed our legal name to PEP Housing in October. We felt it was more representative of who we are and what we have become, The Leading Senior and Veterans Affordable Housing provider in Sonoma, Marin, Butte, Mendocino and Solano Counties.

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, 638 seniors reside in the 20 (with one more in construction) 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 pre-development.

2022 Accomplishments

- **Vigil Light Senior Apartments Community room** received a much-needed facelift made possible by a generous grant from the Bethlehem Foundation. We repainted the room and purchased new flooring, furniture and fixtures, and window covering treatments. New audio-visual equipment was installed to hold hybrid Board meetings. This Community room was truly transformed from the 1983's décor to the 21st Century.
- **PEP's website** needed maintenance upgrades. Thanks again to the Bethlehem Foundation for the grant that allowed us to migrate our content onto a new platform before it became obsolete. This upgrade allows staff to update web content without consulting our website administrator.
- **Construction was completed for River City Senior Apartments**, a 54-unit property located at the site of PEP's former office building, 951 Petaluma Blvd. S. in Petaluma. The project is beautiful. It houses nineteen homeless veterans, fifteen homeless seniors, and nineteen general population seniors.
- **Construction was completed on the Linda Tunis Senior Apartments**, a rehab project transforming the former Scottish Rite Masonic building at 615 Acacia Avenue in Santa Rosa into 26 units, 25 for seniors with preference given to seniors that were impacted by a federally-declared disaster such as the Tubbs Fire.
- **Pony Express Senior Apartments in Vacaville, CA is nearing completion** and should have new residents by March 2023. The project will house sixty seniors, including fifteen homeless seniors.
- **PEP Housing was successfully selected to complete a pilot project called the CAPABLE Project**, a project that was developed at the John Hopkins School of Nursing and provides one-on-one assistance with our residents and an occupational therapist, registered nurse, and the PEP Housing maintenance department. CAPABLE is a client-centered home-based intervention to increase mobility, functionality, and capacity to "age in community" for low-income older adults. We are seeing tremendous results from our residents participating in the program.
- **Our first mini documentary was completed in 2022.** Please watch the video at this link vimeo.com/humansbeingmedia/download/741960122/3e103c2111; vimeo.com/741960122/5edc6ee024 or visit our website at Pephousing.org

Drum circle
with Vigil Light
and Acacia Lane
residents



STATISTICS AT A GLANCE

A total of **31,958 services** were provided to our residents from 7/1/21-6/30/22. Our services reached **98.1% of our residents**. We provided nine services per resident during the year. Of the services provided, 538 were general information and referrals, 545 isolation interventions, 521 outreach services, 519 monitoring services, and 403 meals.

The average age of residents is 78 years old (31% between 62-74, 42% between 75-82, and 26% between 83-99). One percent of our population are disabled non-elderly residents.

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

PEP Has 20 Senior Communities plus one in construction



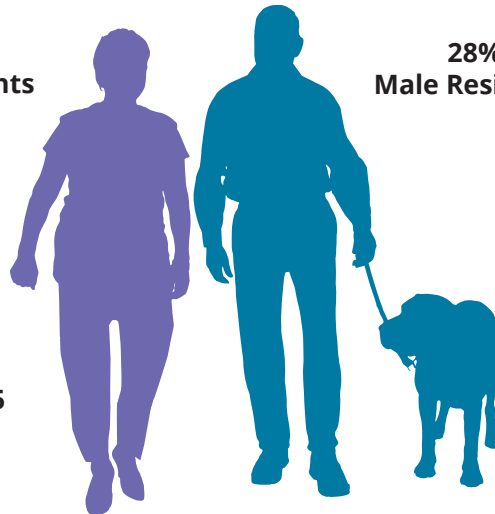
638 Total Residents

72%
Female Residents

28%
Male Residents

71 Veterans

Ages: Female & Male
Average Age: **80**
Our Oldest Resident: **95**



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

Resident Demographics

**30% of our residents volunteer at our properties
or in the community.**

Asian • Black • Hawaiian/Pacific Islander
Hispanic • Native American • White • Two or more races

2022 Services provided by Resident Service Coordinators:

- | | | | |
|---------------------------|--|--------------------------------|-------------------------------|
| • Advocacy: 278 | • Family Support: 14 | • Lease Education: 54 | • Support Counseling: 687 |
| • Assessment: 206 | • General Information & Referral: 3662 | • Legal Assistance: 154 | • Tax Preparation Services: 3 |
| • Benefits: 4493 | • Health Care Services: 1455 | • Meals: 1540 | • Translation: 3 |
| • Case Management: 11 | • Home Management: 252 | • Mental Health Services: 138 | • Transportation: 86 |
| • Conflict Resolution: 14 | • Homemaker: 17 | • Monitoring Services: 2761 | • Other: 455 |
| • Education: 1303 | • Isolation Intervention: 5918 | • Outreach: 8,815 | |
| • Fair Housing: 28 | | • Resident/Tenant Councils: 63 | |

2021 Audited Figures

PEP Housing and Affiliates Combined Statement of Activities

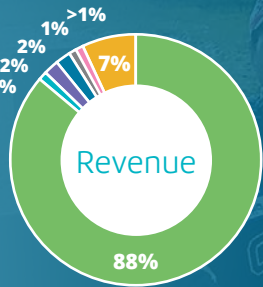
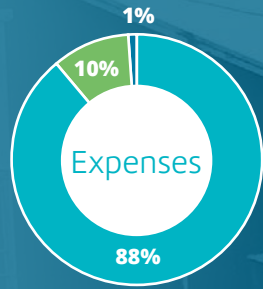
Expenses

88%	Resident Services and Program Operations.....	\$4,670,720 *
10%	Management and General.....	\$544,253
1%	Fundraising.....	72,854
	Total Expenses.....	\$5,287,827

* Excludes Depreciation & Amortization

Revenue

88%	Rental Property Income.....	\$5,032,914
>1%	Property Management Fees	\$17,520
2%	Grants, Donations & Fundraising	\$106,183
2%	Net Assets Released From Donor Restrictions	\$87,785
1%	Net Realized and Unrealized Gain on Investments.....	\$58,639
>1%	Other Income	\$22,976
7%	Gain Upon Debt Extinguishment.....	\$401,000
	Total Revenue.....	\$5,727,017



Statement of Financial Position – PEP Only

Current Assets.....	\$2,944,477
Other Assets	\$17,289,895
Total Assets	\$20,234,372

Current Liabilities.....	\$301,602
Long Term Obligations.....	\$10,408,574
Total Liabilities.....	\$10,710,176

Net Assets.....	\$9,524,196
Total liabilities and Net Assets.....	\$20,234,372



Who has a seat at the table — Our Board Members

Banker – 2 • General Contractor • PEP Resident • Attorney • Mortgage Broker
Merger Acquisitions Broker • Real Estate • Finance • Real Estate Broker • CPA • Licensed
Sr. Professional in Human Resources • Average tenure on the Board: **11 years**

Where our Board Members live

Novato, Petaluma, Rohnert Park, Santa Rosa, Windsor

Employment at PEP

Employee age range: **22-71** • Average age: **54** • Longest years employed: **19**

Years employed at PEP

10 YEARS OR MORE

15 YEARS OR MORE

6 employees

3 employees



Resident Services – Programs & Services

Research has established that the incidence of chronic diseases and functional limitation increases with age. This holds true for older adults receiving rental assistance. The average age of residents is 78 years old (31% between 62-74, 42% between 75-82, and 26% between 83-99). One percent are disabled non-elderly residents.

As residents grow older, it results in changes in their needs and conditions. Every component of their wellbeing is effected, including health, physical, social, behavioral, and economic aspects. As such, to become more responsive to these changes, our programs were geared toward enhancing their functionality, safety, and independence to remain in their homes. These conditions were compounded by the onset of the pandemic in March 2020.

We developed innovative ways of bringing these supports to our communities so everyone remains safe and well with the least amount of disruption in how these services were being provided.

Health/Wellness/Fitness

PEP-sponsored chair yoga was ongoing once per week using a Zoom platform in all our communities.

In addition, Santa Rosa Junior College provided classes using Zoom in the comfort of their homes. Other virtual offerings were utilized through You Tube and Senior Planet.

Nutrition Education was sponsored by the Center of Well Being and Area Agency on Aging called Food Smarts which is a 3-session class. It was also held using Zoom.

Food security was achieved by accessing CalFresh (Food Stamps), and residents were strongly encouraged to apply. This was in addition to the monthly food distribution to properties through our partnership with local food banks in Ukiah, Oroville and Redwood Empire Food Bank in Sonoma County.

Informational classes through HICAP were also brought into our communities for those who need to enroll and make informed choices on Medicare.

Flu and Covid vaccine clinics were sponsored and held by local pharmacies in the area. Oral health was offered virtually through our partnership with Fenwick Foundation.

Disaster Preparedness was a two series workshop offered by a non-profit group called Emergency Prep Help. PEP provided free supplies to each of the "GO BAGS" that were given to residents attending workshops.

Social Isolation Intervention

Various programs were introduced and maintained in our communities through our partnerships with

Fenwick Foundation. It offered a variety of programs in arts, dance, music and theater in the comfort of their homes. Well Connected through AARP had free virtual classes residents could access. Senior Planet offered classes on how to use Zoom and how to safely access services and resources in the community.

PEP Housing partnered with COVIA-Ruth's Table (based in San Francisco, California) that offered a series of art classes called

Creative Sparks. We provided the materials and paid for the trainers' fee for six consecutive weeks. In addition, we offered another series of three classes. It was concluded with a virtual exhibit.

Flowers for a Cause was a program we developed in partnership with Trader Joes. Once a week, live plants and flowers were distributed in the communities. "Throughout the year, indoor plants and vases filled with flowers can be a real mood lifter – adding color and sweet fragrance to our environment. During the spring and summer months, the availability of local fresh cut flowers and greens make flower arranging a very accessible hobby. In addition to beautifying our surroundings, flower arranging encourages improved manual dexterity, promotes sensory stimulation and



can reduce stress.” We received positive feedback from those who received and enjoyed the plants and flowers, claiming their moods changed to inspiration and motivation.

Music therapy was offered through a drum circle by a local artist in the area. PEP Housing will pay for the trainer’s fee on a monthly basis to benefit communities in both Santa Rosa and Petaluma.

Social, Recreational and Enrichment Activities

Here are the benefits of social activities for the elderly.

Increases longevity: Social activities can contribute to the elderly living a happier and longer life, especially when surrounded by loved ones and friends.

Restful sleep: Lack of social activity can make one feel lonely and isolated.

One of the best benefits is that these social activities can begin to minimize or mitigate the effects of mental illness or addiction. Suddenly, the brain and mind are occupied by a new activity, and there is a new way to derive pleasure. This can help stabilize seniors’ moods and emotions and rebuild their outlook on life.

We strive to include various types of social, recreational, and enrichment activities to engage our seniors. This includes a variety of activities to celebrate holidays, birthdays, etc. There were movies, dominoes, Easter egg hunt, Christmas caroling, coffee time, Harvest Luncheon, coffee and brunch, ice cream socials, Polynesian Dancers, etc. We utilized local artists and dance groups in the area.

Digital Divide

“Digital divide is a gap between tech savvy people having access to digital technology and those who don’t have this access or technology skills. 15% of U.S. seniors over 65 years of age are not tech savvy if not to say technophobic.”

“The elderly population has been hit with some of the worst effects of the pandemic, with harsher lockdown measures and increased risks of mental and physical health problems, and the digital divide has seen that the effects of these measures have not been minimized.”

“The digital divide separates people with easy access to the latest technology and decent connectivity and people without it.

People who cannot benefit from the digital age are at an inherent disadvantage, creating disparities in education, healthcare and digital skills. This digital disparity can occur for myriad reasons.”

The Affordable Connectivity Program (ACP) is a U.S. government program that helps many low-income

households pay for broadband service and internet connected devices.

Access to this program is fulfilled through information dissemination by the service coordinator and motivating residents to enroll in the program. Limited number of tablets were provided by PEP Housing. Classes were offered virtually in the community rooms using the big screen and connected to an IPAD. In addition, through our partnership with Area Agency on Aging, IPADs will also be provided to a limited number of individuals that qualify for the program. PEP was approved for a free licensing program partnership with Senior Planet. We completed the Trainer Training program. We launch these free technology classes to our older adults in the various communities after trainers completed the training for the classes.

Summary and Conclusion

Another model that has shown positive results, both in terms of health outcomes and cost savings, is Community Aging in Place Advancing Better Living for Elders (CAPABLE). CAPABLE began as John Hopkins researched study on the effects of in-home services that modify home environment and change participants’ behavior to make daily tasks easier. Through CAPABLE, a team that includes a registered nurse, an occupational therapist, and a handyman assesses the home environment, in consultation with the resident, to prioritize interventions that enhance function, safety and independence. PEP is currently participating in a two-year pilot program for 2022-2023. Both OT and RN were hired on contract with PEP. They completed online training with John Hopkins University School of Nursing CAPABLE program. Our OT and RN visited and completed their home assessments with successful results to our residents that are participating in the program. Through this program, PEP Housing purchased supplies and durable medical equipment that are simple and easy to use in their homes to prevent fall risks. This resulted in overall improvement in their quality of life due to changes in their ability to perform activities of daily living. We envision that we will implement this model in all of our communities to reach more older adults to achieve a better quality of life as they age in place.

We need more funding to implement programs that will benefit our older adults. We utilize existing resources in our communities through our partnerships with Area on Aging, local hospitals and other service providers in the area. We intensify access to benefits and programs available to our population so they maintain adequate housing and stability in other areas of their lives as they age in place.





The Richard Rodkin Community Room

River City Senior Apartments, a 54-unit project in Petaluma that includes The Richard Rodkin Community Room, opened in August 2022. Richard led the organization and served in leadership roles for ten years: VP, 2010; President, 2011-2012; VP, 2014-2016, President, 2017; and VP 2018-2019.



Welcome New Board Members

Jim Ryan joined the Board in October 2022. Jim is a licensed Real Estate Broker and a licensed General Contractor. Jim is the Broker and an owner of Ryan Realty, Inc. and Ryan Mortgage, Inc. He has been involved with development, construction, management, financing, brokering and ownership of properties for over 45 years.

Mary Savage Retiring from the Board

After serving eighteen years, Mary is retiring in December 2022. For years, Mary has served as the Secretary of the Board and is always available to assist PEP in any area necessary. We will miss her and wish her a wonderful retirement.

2022-2023 Board of Directors

Sean Pryden, *President*

George (Kip) F. Spragens, *Vice President*

Ben Pryden, *Treasurer*

Mary Savage, *Secretary*

Mary Stompe, *Assistant Secretary*

Sid Lipton

Anna Rose

Joseph Tinney

Harry Coffey

Don Ross

Roy Martinez

Jeff Mayne

Jim Ryan

Save the Date

MAY 5, 2023

After a three-year hiatus due to COVID, we are delighted to announce our 45th Anniversary Gala, Reach for the Stars.

You will not want to miss this one. We are hosting the party in a very unique location in Petaluma. It is still a secret, but we can guarantee that you have never been to a party here before. Save the date for an extraordinary evening supporting affordable housing for seniors and veterans with limited incomes.

What's in a Name?

For many years, PEP Housing named communities after the street where the property was located. Beginning with Richard S. Lieb Senior Apartments in 2004, we started honoring founders and long-term Board members by naming properties after them. Richard Lieb was a Planner who designed our first ten properties. Some of our older properties still have "street names", but that is changing as we continue to honor amazing people that have impacted our organization.

For our Oroville project, we wanted a name that was representative of the history of Oroville, and we landed on the Orange Tree. The Mother Orange Tree is the oldest living orange tree in California, and it is located in Oroville. We were able to get trimmings from U.C. Davis and graft them on an orange tree (shown below) at the property.

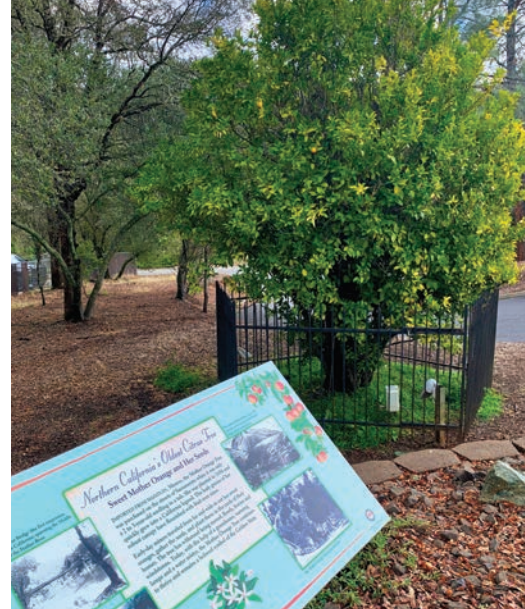
Linda Tunis Senior Apartments is named after a wonderful woman who lost her life at Journey's End Mobile Home Park in Santa Rosa during the Tubbs Fire. Her daughter worked for PEP as a Resident Manager for nearly a decade.

Pony Express Senior Apartments in Vacaville was named because Vacaville was on the Pony Express trail. The Pony Express National Historic Trail was a cross-country route where men on horses carried priority mail from Missouri to California from 1860 to 1861.

Sun House Senior Apartments was named after our neighbor, The Grace Hudson Museum in Ukiah, California. The Sun House is where artist Grace Hudson and her husband John lived. John designed and built Sun House in 1911.

We renamed a few properties after long-term Board members no longer with us. This includes Herb Lee, serving 17 years (Herb Lee Senior Apartments located on Daniel Drive, Petaluma), Don Bennett, serving for 13 years (Don Bennett Senior Apartments on Lindberg Lane, Petaluma), and Leota Fisher, 101 years young, serving 26 years (Fisher Senior Apartments I and II, on Wilson Street, Petaluma).

Kellgren Senior Apartments in Petaluma is named after Tim Kellgren, one of PEP Housing's founders. The residents love dressing up his bronze bust that sits outside of the community room.



Our Communities ~ 20 and growing!



Herb Lee Senior Apts - 5 units

Our first community in 1980. A very small community in a peaceful setting, homey and sweet.
Petaluma CA | Built - 1980



Fisher Senior Apts II - 10 units

A quiet setting, set back from the street, very peaceful and comfortable.
Petaluma CA | Built - 1984



Don Bennett Senior Apts - 16 units

A very comfortable community with a spirited group of residents who care about one another.
Petaluma CA | Built - 1986



Our Communities ~ 20 and growing!



Fisher Senior Apts I - 6 units

A charming private, quiet location housing a close-knit community.
Petaluma CA | Built - 1988



Mountain View Apts - 24 units

Twenty 1-bedroom apartments and four 2-bedroom apartments designated for those with disabilities.
Petaluma CA | Built - 1991



1405 Caulfield Lane Apts - 22 units

A strong and supportive group of residents enjoy this comfortable community which showcases the outdoors with garden courtyards.
Petaluma CA | Built - 1992



575 Vallejo St. Apts - 45 units

A community where neighbors can be found helping neighbors in a myriad of ways.
Petaluma CA | Built - 1994



579 Vallejo St. Apts - 40 units

Community is a hub of many diverse activities throughout the day and early evening hours.
Petaluma CA | Built - 1998



Edith Street Apts - 23 units

A warm and comforting feeling of home at this small community.
Petaluma CA | Built - 2001



Richard Lieb Apts - 23 units

Named for a longtime PEP Housing advocate, this community is home to happy and supportive residents.
Petaluma CA | Built - 2004



1400 Caulfield Lane - 2 units

A charming, quaint, and small community with a close knit, friendly group of residents.
Petaluma CA | Built - 2006



Casa Grande Senior Apts - 58 units

2-story community near a school offers opportunities for student collaborations and features garden beds, a dog run & solar panels.
Petaluma CA | Built - 2008

“Thank you to PEP for all that you do for us!” – Julia



Toussin Senior Apts - 13 units

Beautiful Marin County views of Mt. Tamalpais from this 2-story community. Solar panels.
Kentfield CA | Built - 2011



Acacia Senior Apts - 44 units

A comfortable 3-story building is home to a confident group of residents. Solar panels.
Santa Rosa CA | Built - 2012



Kellgren Senior Apts - 50 units

Beautiful 3-story community features community room, garden beds, a dog run & solar panels.
Petaluma CA | Built - 2014



Orange Tree Senior Apts - 50 units

Downtown Oroville neighborhood is convenient to amenities and features garden beds and a dog run.
Oroville CA | Built - 2014



Sun House Senior Apts - 42 units

Featuring a dog run, garden beds & solar panels.
Ukiah CA | Built - 2017



Vigil Light Senior Apts - 49 units

This townhouse style community is surrounded by lush landscaping.
Santa Rosa CA | Built - 1983



Linda Tunis Senior Apts - 26 studios

Our first reuse project, formerly the Scottish Rite Masonic Lodge.
Santa Rosa CA | Built - 2022



River City Senior Apts - 54 units

Community areas and a beautiful patio overlooking the Petaluma River.
Petaluma CA | Build - 2022



COMING SOON!

Pony Express Senior Apts - 60 units

Completion in March 2023.
Vacaville CA



Visit us at pephousing.org to donate or volunteer!

Newly Completed Projects and Projects in Development.

Pony Express Senior Apartments in Vacaville

Construction at the Pony Express Senior Apartments in Vacaville is nearing completion. This 60-unit housing complex will provide housing to seniors and seniors experiencing homelessness. The facility will include a large community room, computer room, wellness center, dog run and even a separate building where residents are encouraged to create, tinker, and build enriching hobbies further strengthening the community. The beautifully designed concrete foundation ties the buildings together under umbrellas and the shade of the oak tree with walking paths and lemon trees. We anticipate completion by March 2023.



Pony Express — Anticipated Completion March 2023



Artist Amanda Lynn creates bright mural for Linda Tunis

garden beds and a dog run. Each studio will provide an individual with a place to call home. We celebrated the Grand Opening on October 25, 2022.

River City Senior Apartments in Petaluma

The construction at River City Senior Apartments has come to an end, and PEP celebrated its Grand Opening on August 12, 2022. We welcomed over 100 guests to celebrate the completion of 54 living units with resident services and associated common areas. The 1.31-acre property provides residents a community room with full kitchen, wellness center, dog run, and a beautiful outdoor patio overlooking the Petaluma River. The three buildings were designed to reflect the old and new of Petaluma with vintage photos showing its rich history. We are proud that this project is providing housing to nineteen homeless veterans, fifteen homeless seniors and nineteen low-income seniors.

Photo Right: Mary Stompe and Nancee Robles at the River City Grand Opening.



Acacia Lane Celebrates Ten-year Anniversary

Acacia Lane Residents and staff celebrated their ten-year anniversary. The community opened in June 2012 and has been home to many seniors over the last ten years. The beautiful gardens, stunning mountain views and easy access to walking trails make this 44-unit property a cherished home for our residents.

Executive Staff

Mary Stompe, *Executive Director*
Steve Lucanic, *Consultant, Accounting*
Kerrily Beaton, *Director of Compliance*
Dominic Roybal, *Director of Property Management*

Jim Wallen, *Director of Development*
Sharon Patchin, *Director of Human Resources*
Pam Lemos, *Director of Maintenance*

PEP Housing | 625 Acacia Lane, Santa Rosa, CA 95409 | pephousing.org / 707-762-2336

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