

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

PHA Plans

5-Year Plan for Fiscal Years 2000 - 2004

Annual Plan for Fiscal Year 2003

**HOUSING AUTHORITY OF THE
COUNTY OF
SAN BERNARDINO**

**PHA Plan
Agency Identification**

PHA Name: Housing Authority of the County of San Bernardino

PHA Number: CA019

PHA Fiscal Year Beginning: (mm/yyyy) 10/2003

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices
- Main administrative office of the local government
- Main administrative office of the County government
- Main administrative office of the State government
- Public library
- PHA website
- Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- Main business office of the PHA
- PHA development management offices
- Other (list below)

5-YEAR PLAN
PHA FISCAL YEARS 2000 - 2004
[24 CFR Part 903.5]

A. Mission

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: (state mission here)

To help low-income individuals and families in San Bernardino County by providing and promoting affordable housing, housing assistance payment programs, self-sufficiency programs, safe housing environments, and homeownership opportunities.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

- PHA Goal: Expand the supply of assisted housing
- Objectives:
- Apply for additional rental vouchers:
 - Reduce public housing vacancies:
 - Leverage private or other public funds to create additional housing opportunities:
 - Acquire or build units or developments
 - Other (list below)
 - Increase the Housing Authority's seniors' housing stock by ten percent
 - Increase the Housing Authority's non-HUD affordable housing stock by ten percent

B. Goals

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing (cont.)

- PHA Goal: Improve the quality of assisted housing
Objectives:
 - Improve public housing management: (PHAS score)
 - Improve housing choice voucher management: (SEMAP score)
 - Increase customer satisfaction:
 - Concentrate on efforts to improve specific management functions: (e.g., public housing finance; voucher unit inspections)
 - Renovate or modernize public housing units:
 - Demolish or dispose of obsolete public housing:
 - Provide replacement public housing:
 - Provide replacement vouchers:
 - Other: (list below)
 - Increase resident satisfaction with maintenance services by 20 percent

- PHA Goal: Increase assisted housing choices
Objectives:
 - Provide voucher mobility counseling:
 - Conduct outreach efforts to potential voucher landlords
 - Increase voucher payment standards
 - Implement voucher homeownership program:
 - Implement public housing or other homeownership programs:
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:
 - Other: (list below)
 - Implement memorandum agreements with other housing authorities within the county and adjacent counties to increase voucher mobility and reduce administrative workload by ten percent

B. Goals

HUD Strategic Goal: Improve community quality of life and economic vitality

- PHA Goal: Provide an improved living environment
 - Objectives:
 - Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
 - Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
 - Implement public housing security improvements:
 - Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - Other: (list below)
 - Improve safety awareness and resident satisfaction in Housing Authority developments by 15 percent
 - Reduce crime incidents in Housing Authority developments by ten percent
 - Improve relations between the county resident group and law enforcement services

HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals

- PHA Goal: Promote self-sufficiency and asset development of assisted households
 - Objectives:
 - Increase the number and percentage of employed persons in assisted families:
 - Provide or attract supportive services to improve assistance recipients' employability:
 - Provide or attract supportive services to increase independence for the elderly or families with disabilities.
 - Other: (list below)
 - Develop partnerships with community service providers to improve economic advancement of, self-sufficiency of, and home ownership achievement by Housing Authority residents and voucher participants. (Also recommended by San Bernardino County Area-Wide Resident Advisory Board)
 - Develop partnerships with non-profit organizations and local universities to train and/or employ residents enrolled in Housing Authority sponsored Welfare-to-Work programs

B. Goals

HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:
 - Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
 - Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
 - Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
 - Other: (list below)

Other PHA Goals and Objectives:

Improve public housing property management efficiency through a balance of in-house and private firm management of the Housing Authority's public housing portfolio.

Establish joint ventures with non-profits to increase development and/or acquisition of affordable housing stock for the Housing Authority.

Increase case management efficiency and reduce assisted housing program operation cost through computerization of repetitive administrative tasks.

Improve integration of Housing Authority software and interface with HUD software to optimize monitoring and reporting of operational and financial performance.

Annual PHA Plan
PHA Fiscal Year 2003
[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Streamlined Plan:

- High Performing PHA**
- Small Agency (<250 Public Housing Units)**
- Administering Section 8 Only**

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

This Annual Plan details our strategy for addressing affordable housing needs of low-income families in San Bernardino County. As the largest geographic county within the continental United States, our jurisdiction covers 39 cities in our Housing Choice Voucher program and 23 cities in our public housing programs. Approximately nine percent of the 2,100,000 County residents are at the extremely low- or very low-income categories.

Our strategy to address the extremely high demand for affordable housing was designed within funding constraints and available financial resources. Since the Department of Housing and Urban Development (HUD) is our primary funding source, this Annual Plan incorporates HUD requirements for eligibility, assistance, operation, and management of public housing and assisted housing programs. The plan also includes our plan of action to promote self-sufficiency and to reduce crime and safety problems within our developments.

Our major initiatives include joint ventures with non-profits to develop or acquire affordable housing units for the elderly and qualified low-income families and use of private management firms to improve efficiency in our public housing programs.

Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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List of Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

Required Attachments:

- A: FY 2002 Capital Fund Program (CFP) Performance and Evaluation Report
- B: FY 2000 Capital Fund Program Replacement Housing Factor (CFPRHF) Performance and Evaluation Report
- C: FY 2001 Capital Fund Program Replacement Housing Factor (CFPRHF) Performance and Evaluation Report
- D: FY 2002 Capital Fund Program Replacement Housing Factor (CFPRHF) Performance and Evaluation Report
- E: Substantial Deviation and Significant Amendment or Modifications
- F: Statement of Progress on the 5-Year Plan Mission and Goals
- G: Resident Membership of the PHA Governing Board
- H: Membership of the Resident Advisory Boards
- Most recent board-approved operating budget (required attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- Admissions Policy for Deconcentration

Optional Attachments:

- I: PHA Management Organizational Chart
- J: Project-Based Voucher Program
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Certification for a Drug-Free Workplace
- Disclosure of Lobbying Activities
- Certification of Payments to Influence Federal Transactions
- Certifications of Local Officials of PHA Plan Consistency with Consolidated Plans
- PHA Certifications of Compliance with the PHA Plans and Related Regulations

List of Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
<input checked="" type="checkbox"/>	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5-Year and Annual Plans
<input checked="" type="checkbox"/>	State/Local Government Certification of Consistency with the Consolidated Plan	5-Year and Annual Plans
<input checked="" type="checkbox"/>	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5-Year and Annual Plans
<input checked="" type="checkbox"/>	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
<input checked="" type="checkbox"/>	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
<input checked="" type="checkbox"/>	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (Section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
<input checked="" type="checkbox"/>	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
<input checked="" type="checkbox"/>	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
<input type="checkbox"/>	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
<input checked="" type="checkbox"/>	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
<input checked="" type="checkbox"/>	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
<input type="checkbox"/>	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
<input type="checkbox"/>	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
<input checked="" type="checkbox"/>	Most recent, approved 5-Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
<input type="checkbox"/>	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
<input type="checkbox"/>	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
<input type="checkbox"/>	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
<input type="checkbox"/>	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to Section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
<input type="checkbox"/>	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
<input type="checkbox"/>	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
<input checked="" type="checkbox"/>	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
<input type="checkbox"/>	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
<input checked="" type="checkbox"/>	The most recent fiscal year audit of the PHA conducted under Section 5(h)(2) of the U.S. Housing Act of 1937 (42 U. S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

COUNTY OF SAN BERNARDINO

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	15,960	5	4	3	5	4	3
Income >30% but <=50% of AMI	10,203	5	4	3	5	4	3
Income >50% but <80% of AMI	11,414	3	3	2	4	5	3
Elderly	4,133	5	5	4	5	3	3
Families with Disabilities	N/A	5	5	4	5	4	3
Race/Ethnicity: Black	N/A	5	4	3	4	4	3
Race/Ethnicity: Hispanic	N/A	5	4	3	4	4	3

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2001
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)
CHAS Data Book Table 5 1993

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF SAN BERNARDINO

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	2,055	5	5	5	4	4	4
Income >30% but <=50% of AMI	1,326	5	5	4	4	4	4
Income >50% but <80% of AMI	4,756	5	3	3	4	3	4
Elderly	1,500	5	5	3	4	3	4
Families with Disabilities	1,058	5	5	4	4	3	4
Race/Ethnicity: Black	846	5	5	5	4	4	4
Race/Ethnicity: Hispanic	1,920	5	5	5	4	4	4

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2003
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF FONTANA

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	4,005	4	4	4	4	4	4
Income >30% but <=50% of AMI	3,374	4	4	4	4	4	4
Income >50% but <80% of AMI	6,000	3	3	3	4	3	4
Elderly	1,061	3	3	3	3	2	3
Families with Disabilities	3,703	5	5	4	4	4	4
Race/Ethnicity: Black	1,820	5	4	4	4	4	4
Race/Ethnicity: Hispanic	5,763	4	4	4	3	4	4

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2000-2005
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF ONTARIO

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	2,395	4	5	4	4	4	3
Income >30% but <=50% of AMI	1,901	4	5	4	4	4	3
Income >50% but <80% of AMI	2,640	4	4	4	4	4	3
Elderly	911	5	4	3	4	3	3
Families with Disabilities	N/A	4	5	4	4	4	3
Race/Ethnicity: Black	N/A	4	4	4	4	4	3
Race/Ethnicity: Hispanic	N/A	4	4	4	4	4	3

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2002-2004
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)
Final Second Amendment to the Consolidated Plan FY 2002-2003
Indicate year: 2003

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF CHINO

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	530	5	5	2	N/A	5	1
Income >30% but <=50% of AMI	657	5	4	2	N/A	4	1
Income >50% but <80% of AMI	1,033	4	3	2	N/A	3	1
Elderly	387	5	4	2	N/A	1	1
Families with Disabilities	N/A	5	3	2	N/A	N/A	1
Race/Ethnicity: Black	100	5	4	2	N/A	4	1
Race/Ethnicity: Hispanic	626	5	4	2	N/A	4	1

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2000-2005
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF RANCHO CUCAMONGA

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	857	5	4	4	4	5	4
Income >30% but <=50% of AMI	920	4	4	4	4	5	4
Income >50% but <80% of AMI	1,796	3	3	3	4	3	4
Elderly	491	3	3	3	3	2	3
Families with Disabilities	N/A	5	5	4	5	4	4
Race/Ethnicity: Black	N/A	N/A	3	4	4	4	4
Race/Ethnicity: Hispanic	N/A	N/A	3	4	4	4	4

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2001
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF VICTORVILLE

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	1,441	5	3	4	4	5	5
Income >30% but <=50% of AMI	1,094	5	3	4	4	5	5
Income >50% but <80% of AMI	1,015	4	3	3	4	4	4
Elderly	N/A	5	5	3	4	2	4
Families with Disabilities	4,733	5	5	4	5	4	4
Race/Ethnicity: Black	399	N/A	3	4	4	4	4
Race/Ethnicity: Hispanic	917	N/A	3	4	4	4	4

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2002
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)
Annual Action Plan 2003-2004
Indicate year: 2002

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF RIALTO

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	2,824	5	4	4	5	5	5
Income >30% but <=50% of AMI	2,218	5	3	4	4	5	5
Income >50% but <80% of AMI	3,602	3	3	3	4	4	4
Elderly	4,822	5	3	3	4	2	3
Families with Disabilities	5,460	5	4	4	5	4	4
Race/Ethnicity: Black	5,210	4	3	3	4	4	3
Race/Ethnicity: Hispanic	12,294	4	3	3	4	5	3

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2001-2005
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)
Housing Element 2000-2005
Indicate year: 2000

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

CITY OF HESPERIA

Housing Needs of Families in the Jurisdiction By Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	1,082	4	3	4	4	5	5
Income >30% but <=50% of AMI	844	4	3	4	4	5	5
Income >50% but <80% of AMI	959	4	3	3	4	4	4
Elderly	463	4	4	3	4	2	4
Families with Disabilities	392	5	5	4	5	3	4
Race/Ethnicity: Black	208	N/A	3	4	4	4	4
Race/Ethnicity: Hispanic	1,530	N/A	3	4	4	4	4

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2002-2005
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)
Annual Action Plan: 2003-2004
City of Hesperia General Plan: Housing Element – Amended 9/5/2001

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdictions Served by the PHA

TOWN OF APPLE VALLEY

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	104	5	3	4	4	5	5
Income >30% but <=50% of AMI	105	5	3	4	4	5	5
Income >50% but <80% of AMI	166	5	3	3	4	4	4
Elderly	252	5	5	3	4	2	4
Families with Disabilities	216	5	5	4	5	3	4
Race/Ethnicity: Black	70	5	3	4	4	4	4
Race/Ethnicity: Hispanic	150	4	3	4	4	4	4

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction
Indicate year: 2002-2006
- U.S. Census data: the Comprehensive Housing Affordability Strategy (CHAS) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

1. Statement of Housing Needs

B. Housing Needs of Families on the Public Housing and Section 8 Tenant-Based Assistance Waiting Lists

State the housing needs of the families on the PHA's waiting list/s. Complete one table for each type of PHA-wide waiting list administered by the PHA.

Housing Needs of Families on the Waiting List (Public Housing)			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input checked="" type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	8,583		252
Extremely low income <=30% AMI	6,558	76	
Very low income (>30% but <=50% AMI)	1,685	20	
Low income (>50% but <80% AMI)	306	4	
Families with children	4,567	53	
Elderly families	667	8	
Families with Disabilities	728	8	
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	1,981	23	
2 BR	4,187	49	
3 BR	1,956	23	
4 BR	390	4	
5 BR	68	1	
5+ BR	1	0	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

1. Statement of Housing Needs

B. Housing Needs of Families on the Public Housing and Section 8 Tenant-Based Assistance Waiting Lists

Housing Needs of Families on the Waiting List (Housing Choice Voucher Program)			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	13,352	69	1,900
Extremely low income <=30% AMI	9,265	69	
Very low income (>30% but <=50% AMI)	3,635	27	
Low income (>50% but <80% AMI)	388	3	
Families with children	7,724	58	
Elderly families	1,027	8	
Families with Disabilities			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 17			
Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			

1. Statement of Housing Needs

C. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through Section 8 replacement housing resources
- Maintain or increase Section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- Maintain or increase Section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase Section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

Strategy 2: Increase the number of affordable housing units by:

Select all that apply

- Apply for additional Section 8 units should they become available
- Leverage affordable housing resources in the community through the creation of mixed - finance housing
- Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- Other: (list below)
Develop and/or acquire affordable housing units through joint ventures or use of available resources

1. Statement of Housing Needs

C. Strategy for Addressing Needs

(1) Strategies

Need: Specific Family Types: Families at or below 30% of median

Strategy: Target available assistance to families at or below 30 % of AMI

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based Section 8 assistance
- Employ admissions preferences aimed at families with economic hardships
- Adopt rent policies to support and encourage work
- Other: (list below)

Need: Specific Family Types: Families at or below 50% of median

Strategy: Target available assistance to families at or below 50% of AMI

Select all that apply

- Employ admissions preferences aimed at families who are working
- Adopt rent policies to support and encourage work
- Other: (list below)

Need: Specific Family Types: The Elderly

Strategy: Target available assistance to the elderly:

Select all that apply

- Seek designation of public housing for the elderly
- Apply for special-purpose vouchers targeted to the elderly, should they become available
- Other: (list below)
Develop elderly public housing through joint ventures

1. Statement of Housing Needs

C. Strategy for Addressing Needs

(1) Strategies

Need: Specific Family Types: Families with Disabilities

Strategy: Target available assistance to Families with Disabilities:

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the Section 504 Needs Assessment for Public Housing
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)
Work with non-profits that target housing assistance to families with disabilities.

Need: Specific Family Types: Races or ethnicities with disproportionate housing needs

Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:

Select if applicable

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- Other: (list below)

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- Counsel Section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the Section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)

1. Statement of Housing Needs

C. Strategy for Addressing Needs

Other Housing Needs & Strategies: (list needs and strategies below)

(2) Reasons for Selecting Strategies

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Countywide Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2004 grants)		
a) Public Housing Operating Fund	4,342,166	
b) Public Housing Capital Fund	4,525,000	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	53,691,755	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant	0	N/A
i) HOME	0	N/A
Other Federal Grants (list below)		
Housing Replacement	0	Public Housing Capital Improvements
2. Prior Year Federal Grants (unobligated funds only) (list below)		
Shelter Plus Care	2,125,000	Section 8 Tenant Based Assistance
Housing Replacement	43,350	Public Housing Capital Improvements
Resident Opportunities & Self Sufficiency	650,000	Public Housing Supportive Services
3. Public Housing Dwelling Rental Income		
Conventional Program	4,617,700	Public Housing Operations
Authority-Owned Public Housing	3,332,900	Public Housing Operations
4. Other income (list below)		
Interest/Miscellaneous Income	1,041,300	Public Housing Operations
4. Non-federal sources (list below)	N/A	N/A
Total resources	74,369,171	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

(1) Eligibility

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- When families are within a certain number of being offered a unit: 20 to 50
- When families are within a certain time of being offered a unit: 2 to 3 weeks
- Other: (describe)

b. Which non-income (screening) factors do the PHA use to establish eligibility for admission to public housing (select all that apply)?

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe)
Unlawful detainer history
Credit history

c. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2). Waiting List Organization

a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

- Community-wide list
- Sub-jurisdictional lists
- Site-based waiting lists
- Other (describe)

b. Where may interested persons apply for admission to public housing?

- PHA main administrative office
- PHA development site management office
- Other (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(2) Waiting List Organization

c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection (3) **Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year?¹⁴

2. Yes No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?
If yes, how many lists?

3. Yes No: May a family be on more than one list simultaneously?
If yes, how many lists? 14

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists
- At the development to which they would like to apply
- Other (list below)
PHA brochure

(3) Assignment

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- One
- Two
- Three or More

b. Yes No: Is this policy consistent across all waiting list types?

c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(4) Admissions Preferences

a. Income targeting:

- Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

b. Transfer policies:

In what circumstances will transfers take precedence over new admissions?

- Emergencies
 Overhoused
 Underhoused
 Medical justification
 Administrative reasons determined by the PHA (e.g., to permit modernization work)
 Resident choice: (state circumstances below)
 Other: (list below)
Employment
Education

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(4) Admissions Preferences

c. Preferences

1. Yes No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection **(5) Occupancy**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(4) Admissions Preferences

c. Preferences

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

3 Date and Time

Former Federal preferences:

Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
Victims of domestic violence
Substandard housing
Homelessness
High rent burden

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- 1 Veterans and veterans' families
- 2 Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- 3 Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers
- Not applicable: the pool of applicant families ensures that the PHA will meet income-targeting requirements

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(5) Occupancy

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- The PHA-resident lease
- The PHA's Admissions and (Continued) Occupancy policy
- PHA briefing seminars or written materials
- Other source (list)
- Public Housing Authority brochure

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- At an annual reexamination and lease renewal
- Any time family composition changes
- At family request for revision
- Other (list)

(6) Deconcentration and Income Mixing

a. Yes No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. Yes No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

- Adoption of site-based waiting lists
If selected, list targeted developments below:
- Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments
If selected, list targeted developments below:
- Employing new admission preferences at targeted developments
If selected, list targeted developments below:
- Other (list policies and developments targeted below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(6) Deconcentration and Income Mixing

d. Yes No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income mixing
- Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

Unless otherwise specified, all questions in this section apply only to the tenant-based Section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- Criminal or drug-related activity only to the extent required by law or regulation
 - Criminal and drug-related activity, more extensively than required by law or regulation
 - More general screening than criminal and drug-related activity (list factors below)
 - Other (list below)
 - Outstanding debt to this Housing Authority
 - Megan's Law
- b. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
 - Other (describe below)
If requested in writing and completed Request for Tenancy Approval has been submitted, the PHA will furnish prospective owners with the following: family's current address, name, and address of the current landlord, (if available).

3. PHA Policies Governing Eligibility, Selection, and Admissions
B. Section 8

(2) Waiting List Organization

a. With which of the following program waiting lists is the Section 8 tenant-based assistance waiting list merged? (select all that apply)

- None
- Federal public housing
- Federal moderate rehabilitation
- Federal project-based certificate program
- Other federal or local program (list below)

b. Where may interested persons apply for admission to Section 8 tenant-based assistance? (select all that apply)

- PHA main administrative office
- Other (list below)
- By telephoning main administrative office during times specified in publicized open enrollments
- Housing Authority web site when publicized enrollment is open.

(3) Search Time

a. Yes No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below:

Participants are unavailable to search due to medical reason.

Prospective rental unit did not pass inspection.

Additional time requested due to personal hardships.

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

(4) Admissions Preferences

a. Income targeting

- Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the Section 8 program to families at or below 30% of median area income?

b. Preferences

1. Yes No: Has the PHA established preferences for admission to Section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose Section 8 assistance programs**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

(4) Admissions Preferences

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

Date and Time

Former Federal preferences

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- 1 Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)

- Date and time of application
- Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)

- This preference has previously been reviewed and approved by HUD
- The PHA requests approval for this preference through this PHA Plan

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

(4) Admissions Preferences

6. Relationship of preferences to income targeting requirements: (select one)

- The PHA applies preferences within income tiers
- Not applicable: the pool of applicant families ensures that the PHA will meet income-targeting requirements

(5) Special Purpose Section 8 Assistance Programs

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose Section 8 program administered by the PHA contained? (select all that apply)

- The Section 8 Administrative Plan
- Briefing sessions and written materials
- Other (list below)

b. How does the PHA announce the availability of any special-purpose Section 8 programs to the public?

- Through published notices
- Other (list below)
- Advocacy Groups

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

(1) Income Based Rent Policies

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions.

a. Use of discretionary policies: (select one)

- The PHA will not employ any discretionary rent-setting policies for income-based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

---or---

- The PHA employs discretionary policies for determining income-based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- \$0
 \$1-\$25
 \$26-\$50

2. Yes No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below:

- (i) When the family has lost eligibility for or is awaiting an eligibility determination for a federal, state, or local assistance program, including a family that includes a member who is a non-citizen lawfully admitted for permanent residence under the Immigration and Nationality Act who would be entitled to public benefits but for title IV of the Personal Responsibility and Work Opportunity Act of 1996;
- (ii) When the family would be evicted because it is unable to pay the minimum rent;
- (iii) When the income of the family has decreased because of changed circumstances, such as loss of employment;
- (iv) When a death has occurred in the family; and
- (v) Other hardship circumstances determined by the Housing Authority or HUD.

4. PHA Rent Determination Policies

A. Public Housing

(1) Income Based Rent Policies

c. Rents set at less than 30% than adjusted income

1. Yes No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:
- Fixed percentage (other than general rent-setting policy)
If yes, state percentage/s and circumstances below:
- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

- Yes for all developments
- Yes but only for some developments
- No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

- For all developments
- For all general occupancy developments (not elderly, disabled, or elderly only)
- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion
- For certain size units; e.g., larger bedroom sizes
- Other (list below)

4. PHA Rent Determination Policies

A. Public Housing

(1) Income Based Rent Policies

e. Ceiling rents

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

- Market comparability study
- Fair market rents (FMR)
- 95th percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The "rental value" of the unit
- Other (list below)

f. Rent re-determinations: Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: \$100
- Other (list below)

g. Yes No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

(2) Flat Rents

In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- The Section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper
- Survey of similar unassisted units in the neighborhood
- Other (list/describe below)

4. PHA Rent Determination Policies

B. Section 8 Tenant-Based Assistance

Unless otherwise specified, all questions in this section apply only to the tenant-based Section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Payment Standards

Describe the voucher payment standards and policies.

a. What is the PHA's payment standard? (select the category that best describes your standard)

- At or above 90% but below 100% of FMR
- 100% of FMR
- Above 100% but at or below 110% of FMR
- Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- The PHA has chosen to serve additional families by lowering the payment standard
- Reflects market or submarket
- Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- Reflects market or submarket
- To increase housing options for families
- Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

- Annually
- Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- Success rates of assisted families
- Rent burdens of assisted families
- Other (list below)

4. PHA Rent Determination Policies

B. Section 8 Tenant-Based Assistance

(2) Minimum Rent

a. What amount best reflects the PHA's minimum rent? (select one)

- \$0
 \$1-\$25
 \$26-\$50

b. Yes No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

- 1) When the family has lost eligibility for or is waiting an eligibility determination for a federal, state, or local assistance program;
- 2) When the family would be evicted as a result of the imposition of the minimum rent requirement;
- 3) When the income of the family has decreased because of changed circumstances, including loss of employment;
- 4) When a death has occurred in the family; and
- 5) Other circumstances determined by the Housing Authority or HUD.

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

A. Capital Fund Activities

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

(1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name)

-or-

The Capital Fund Program Annual Statement is provided starting on the next page: (if selected, copy the CFP Annual Statement from the Table Library and insert here)

7. Capital Improvement Needs

A. Capital Fund Activities

(1) Capital Fund Program Annual Statement

Capital Fund Program (CFP)		
Part I: Summary		
Capital Fund Grant Number CA16-P019-501-03 FFY of Grant Approval: <u>(09/2003)</u>		
<input checked="" type="checkbox"/> Original Annual Statement		
Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	907,117.00
3	1408 Management Improvements	765,000.00
4	1410 Administration	400,000.00
5	1411 Audit	-
6	1415 Liquidated Damages	-
7	1430 Fees and Costs	250,000.00
8	1440 Site Acquisition	-
9	1450 Site Improvement	627,500.00
10	1460 Dwelling Structures	791,990.00
11	1465.1 Dwelling Equipment-Nonexpendable	246,133.00
12	1470 Nondwelling Structures	100,000.00
13	1475 Nondwelling Equipment	125,000.00
14	1485 Demolition	-
15	1490 Replacement Reserve	-
16	1492 Moving to Work Demonstration	-
17	1495.1 Relocation Costs	10,000.00
18	1499 Development Activities	-
19	1501 Collateralization of Debt Service	-
20	1502 Contingency	362,847.00
21	Amount of Annual Grant (Sum of lines 2-20)	4,585,587.00
22	Amount of line 21 Related to LBP Activities	50,000.00
23	Amount of line 21 Related to Section 504 Compliance	49,968.69
24	Amount of line 21 Related to Security – Soft Costs	30,600.00
25	Amount of line 21 Related to Security – Hard Costs	497,500.00
26	Amount of line 21 Related to Energy Conservation Measures	333,124.60

7. Capital Improvement Needs

A. Capital Fund Activities

(1) Capital Fund Program Annual Statement

Capital Fund Program (CFP)			
Part II: Supporting Table			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
19-002	Curbs, Gutters, Sidewalks	1450.00	88,000.00
	Street Resurfacing	1450.00	25,000.00
	Security Fencing	1450.00	75,000.00
19-010	Roofing	1460.00	125,000.00
	Concrete	1450.00	40,000.00
	AC's	1465.10	24,000.00
	Security Lighting	1450.00	32,500.00
	Wall Funaced/FAU's	1465.10	44,000.00
	Security Fencing	1450.00	49,500.00
	Flooring	1460.00	35,000.00
	Window Treatments	1460.00	10,000.00
	Vacate Alley	1450.00	30,000.00
	Rehab Community Center	1470.00	25,000.00
	Landscaping	1450.00	75,000.00
PHA Wide	Family Self-Sufficiency	1408.00	81,000.00
	Welfare Reform Initiatives	1408.00	225,000.00
	Fair Housing	1408.00	22,500.00
	Economic Development	1408.00	135,000.00
	Homeownership	1408.00	72,000.00
	Resident Management Training	1408.00	27,000.00
	Staff Development	1408.00	45,000.00
	Security	1408.00	27,000.00
	Tenant Accounting System Upgrades	1408.00	36,000.00
	Inventory Management System	1408.00	22,500.00
	Preventative Maintenance Evaluation	1408.00	36,000.00
	Human Resources Program	1408.00	13,500.00
	PHAS Reporting System Upgrade	1408.00	22,500.00
	LBP Abatement	1460.00	50,000.00
	Modernize Units	1460.00	415,740.00
	Roofing	1460.00	50,000.00
	Concrete	1450.00	50,000.00
Fencing	1450.00	50,000.00	
Landscaping/Grading	1450.00	100,000.00	
Security Lighting	1450.00	12,500.00	

7. Capital Improvement Needs

A. Capital Fund Activities

(1) Capital Fund Program Annual Statement

Capital Fund Program (CFP) Part II: Supporting Table			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
PHA Wide	Water Heaters	1465.10	32,883.00
	Evap. Coolers/AC's	1465.10	54,000.00
	Wall Furnaces/FAU's	1465.10	56,250.00
	Flooring	1460.00	56,250.00
	Window Treatments	1460.00	50,000.00
	Replace Stoves/etc.	1465.10	35,000.00
	Non-Dwelling Structures	1470.00	75,000.00
	Non-Dwelling Equipment	1475.00	125,000.00
	Operations	1406.00	907,117.00
	Fees & Costs	1430.00	250,000.00
	Relocation	1495.10	10,000.00
	Contingency	1502.00	362,847.00
Administration	1410.00	400,000.00	

Capital Fund Program (CFP) Part III: Implementation Schedule		
Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)
19-002	March 2005	September 2006
19-010	March 2005	September 2006
PHA Wide	March 2003	September 2006

7. Capital Improvement Needs

A. Capital Fund Activities

(1) Capital Fund Program Annual Statement

Capital Fund Program Replacement Housing Factor (CFPRHF)		
Part I: Summary		
Capital Fund Grant Number CA16-R019-501-03 FFY of Grant Approval: <u>(09/2003)</u>		
<input checked="" type="checkbox"/> Original Annual Statement		
Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	-
3	1408 Management Improvements	-
4	1410 Administration	-
5	1411 Audit	-
6	1415 Liquidated Damages	-
7	1430 Fees and Costs	-
8	1440 Site Acquisition	-
9	1450 Site Improvement	-
10	1460 Dwelling Structures	-
11	1465.1 Dwelling Equipment-Nonexpendable	-
12	1470 Nondwelling Structures	-
13	1475 Nondwelling Equipment	-
14	1485 Demolition	-
15	1490 Replacement Reserve	-
16	1492 Moving to Work Demonstration	-
17	1495.1 Relocation Costs	-
18	1499 Development Activities	25,440.00
19	1501 Collateralization of Debt Service	-
20	1502 Contingency	-
21	Amount of Annual Grant (Sum of lines 2-20)	25,440.00
22	Amount of line 21 Related to LBP Activities	-
23	Amount of line 21 Related to Section 504 Compliance	-
24	Amount of line 21 Related to Security – Soft Costs	-
25	Amount of line 21 Related to Security – Hard Costs	-
26	Amount of line 21 Related to Energy Conservation Measures	-

7. Capital Improvement Needs

A. Capital Fund Activities

(1) Capital Fund Program Annual Statement

Capital Fund Program Replacement Housing Factor (CFPRHF)			
Part II: Supporting Table			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
19-043	Replacement Housing Factor	1499.00	25,440.00

Capital Fund Program Replacement Housing Factor (CFPRHF)		
Part III: Implementation Schedule		
Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)
19-043	March 2005	September 2006

7. Capital Improvement Needs

A. Capital Fund Activities

(2) Optional 5-Year Action Plan

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

- a. Yes No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)
- b. If yes to question a, select one:
- The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name)
- or-
- The Capital Fund Program 5-Year Action Plan is provided starting on the next page: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

7. Capital Improvement Needs

A. Capital Fund Activities

(2) Optional 5-Year Action Plan

Capital Fund Program Five -Year Action Plan					
Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino		Locality: San Bernardino/San Bernardino County, CA		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1 PHA FY: 2003	Work Statement for Year 2 FFY Grant: CA16-P019-501-04 PHA FY: 2004	Work Statement for Year 3 FFY Grant: CA16-P019-501-05 PHA FY: 2005	Work Statement for Year 4 FFY Grant: CA16-P019-501-06 PHA FY: 2006	Work Statement for Year 5 FFY Grant: CA16-P019-501-07 PHA FY: 2007
CA16P019-001	See Annual Statement	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-002		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-003		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-004		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-005		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-006		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-007		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-008		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-009		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	\$37,600.00
CA16P019-010		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	61,253.00
CA16P019-012		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-013		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16P019-017 (a)		-	-	-	-
CA16P019-017 (b)		\$22,630.00	\$6,840.00	\$14,478.00	-
CA16P019-018 (a)		-	-	-	-
CA16P019-018 (b)		-	25,628.00	39,500.00	-
CA16P019-019		-	18,650.00	-	55,500.00
CA16P019-020		23,400.00	-	7,500.00	-
CA16P019-021		-	-	-	-
CA16P019-022		-	-	-	-
CA16P019-023		27,460.00	31,625.00	-	-
CA16P019-024		-	17,125.00	19,500.00	20,000.00
CA16P019-025		-	7,425.00	50,000.00	-

Capital Fund Program Five -Year Action Plan

Part I: Summary

PHA Name: Housing Authority of the County of San Bernardino Locality: San Bernardino/San Bernardino County, CA

Original 5-Year Plan

Revision No:

Development Number/Name/HA-Wide	Year 1 PHA FY: 2003	Work Statement for Year 2 FFY Grant: CA16-P019-501-04 PHA FY: 2004	Work Statement for Year 3 FFY Grant: CA16-P019-501-05 PHA FY: 2005	Work Statement for Year 4 FFY Grant: CA16-P019-501-06 PHA FY: 2006	Work Statement for Year 5 FFY Grant: CA16-P019-501-07 PHA FY: 2007
CA16P019-026	See Annual Statement	-	-	-	-
CA16P019-027		\$5,000.00	-	\$25,000.00	-
CA16P019-028		-	-	-	-
CA16P019-029		-	\$17,250.00	-	-
CA16P019-030		-	-	-	\$42,525.00
CA16P019-031 (a)		-	-	-	-
CA16P019-031 (b)		34,095.00	36,500.00	23,000.00	-
CA16P019-031 (c)		33,345.00	46,000.00	23,000.00	-
CA16P019-031 (d)		29,300.00	37,630.00	11,000.00	-
CA16P019-031 (e)		-	113,520.00	-	25,500.00
CA16P019-031 (f)		-	-	-	-
CA16P019-032 (a)		-	-	-	12,000.00
CA16P019-032 (b)		-	-	-	92,500.00
CA16P019-032 (c)		-	-	-	75,000.00
CA16P019-032 (d)		4,950.00	-	50,500.00	-
CA16P019-032 (e)		10,700.00	10,625.00	39,075.00	-
CA16P019-034 (a)		94,235.00	27,875.00	-	-
CA16P019-034 (b)		26,640.00	19,250.00	17,950.00	-
CA16P019-034 (c)		-	-	-	-
CA16P019-035 (a)		-	-	15,800.00	17,000.00
CA16P019-035 (b)		20,060.00	-	17,500.00	-
CA16P019-035 (c)		63,775.00	62,495.00	15,000.00	-
CA16P019-035 (d)		-	10,250.00	6,200.00	-
CA16P019-035 (e)		38,200.00	16,940.00	27,450.00	38,250.00
CA16P019-036 (a)		19,295.00	11,925.00	25,500.00	-
CA16P019-036 (b)		-	12,850.00	-	15,000.00
CA16P019-042 (a)		-	-	-	25,500.00
CA16P019-042 (b)		-	16,925.00	-	25,500.00

Capital Fund Program Five -Year Action Plan

Part I: Summary

PHA Name: Housing Authority of the County of San Bernardino Locality: San Bernardino/San Bernardino County, CA

Original 5-Year Plan
 Revision No:

Development Number/Name/HA-Wide	Year 1 PHA FY: 2003	Work Statement for Year 2 FFY Grant: CA16-P019-501-04 PHA FY: 2004	Work Statement for Year 3 FFY Grant: CA16-P019-501-05 PHA FY: 2005	Work Statement for Year 4 FFY Grant: CA16-P019-501-06 PHA FY: 2006	Work Statement for Year 5 FFY Grant: CA16-P019-501-07 PHA FY: 2007
CA16P019-042 (c)	See Annual Statement	\$105,928.00	-	\$38,675.00	-
CA16P019-042 (d)		-	\$8,250.00	-	-
Non-Dwelling Structures & Equip		225,000.00	225,000.00	225,000.00	\$225,000.00
Administration		400,000.00	400,000.00	400,000.00	400,000.00
Other		622,847.00	622,847.00	622,847.00	622,847.00
Operations		907,117.00	907,117.00	907,117.00	907,117.00
PHA Wide		1,056,610.00	1,199,545.00	1,274,995.00	921,995.00
PHA Management Improvements		765,000.00	625,500.00	639,000.00	915,000.00
CFP Funds Listed for 5-year Planning		\$4,535,587.00	\$4,535,587.00	\$4,535,587.00	\$4,535,587.00
Replacement Housing Factor Funds		\$25,440.00	\$25,440.00	\$25,440.00	\$25,440.00

7. Capital Improvement Needs

A. Capital Fund Activities

(2) Optional 5-Year Action Plan

Capital Fund Program Five -Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year: 2 FFY Grant: CA16-P019-501-04 PHA FY: 2004			Activities for Year: 3 FFY Grant: CA16-P019-501-05 PHA FY: 2005		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	CA16P019-017 (b)-7 Units	Entry Doors & Screens	\$5,830.00	CA16P019-017 (b)-7 Units	Entry Doors & Screens	\$6,840.00
		Driveways & Sidewalks	16,800.00	CA16P019-018 (b)-13 Units	Wall Furnaces/FAU's	16,200.00
	CA16P019-020-8 Units	Security Lighting	2,500.00		Water Heaters	9,428.00
		Replace Interior Doors	8,000.00	CA16P019-019-24 Units	Entry Doors & Screens	12,050.00
		Replace Concrete	7,500.00		Security Lighting	6,600.00
		Water Heaters	5,400.00	CA16P019-023-9 Units	Evap. Coolers	10,800.00
	CA16P019-023-9 Units	Evap. Coolers	9,720.00		Replace Interior Doors	12,500.00
		Replace Interior Doors	10,250.00		Entry Doors & Screens	8,325.00
		Entry Doors & Screens	7,490.00	CA16P019-024-8 Units	Replace Parking Lot	17,125.00
	CA16P019-027-10 Units	Security Lighting	5,000.00	CA16P019-025-10 Units	Water Heaters	7,425.00
	CA16P019-031 (b)-9 Units	Replace Interior Doors	10,250.00	CA16P019-029-10 Units	Replace Parking Lot	17,250.00
		Security Lighting	4,000.00	CA16P019-031-9 Units	Replace Interior Doors	12,500.00
		Evap. Coolers	9,720.00		Security Lighting	6,900.00
		Wall Furnaces/FAU's	10,125.00		Evap. Coolers	10,350.00
	CA16P019-031(c)-9 Units	Evap. Coolers	9,720.00		Water Heaters	6,750.00
		Replace Interior Doors	10,250.00	CA16P019-031 (c)-9 Units	Evap. Coolers	10,800.00
		Security Lighting	4,000.00		Security Lighting	6,900.00
		Security Fencing	9,375.00		Fencing	10,300.00
	CA16P019-031 (d)-10 Units	Repair Stairways & Decks	6,000.00	CA16P019-031 (d)-10 Units	Water Heaters	6,750.00
		Replace Interior Doors	12,500.00		Wall Furnaces/FAU's	11,250.00
Evap. Coolers		10,800.00	Replace Interior Doors		14,750.00	
CA16P019-032 (d)-6 Units	Entry Doors & Screens	4,950.00	Security Lighting		2,750.00	
CA16P019-032 (e)-25 Units	Entry Doors & Screens	10,700.00	Evap. Coolers	11,880.00		
Subtotal CFP Estimated Cost			\$190,880.00			\$236,423.00

Capital Fund Program Five -Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: 2 FFY Grant: CA16-P019-501-04 PHA FY: 2004			Activities for Year: 3 FFY Grant: CA16-P019-501-05 PHA FY: 2005		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	CA16P019-034 (a)-47 Units	Evap. Coolers	\$50,760.00	CA16P019-031 (d)-10 Units	Rain Gutters	\$8,250.00
		Security Lighting	11,750.00	CA16P019-031 (e)-24 Units	Security Lighting	6,600.00
		Water Heaters	31,725.00		Wall Furnaces/FAU's	29,700.00
	CA16P019-034 (b)-8 Units	Concrete	10,000.00		Water Heaters	17,820.00
		Replace Interior Doors	8,000.00	Replace Interior Doors	59,400.00	
		Evap. Coolers	8,640.00	CA16P019-032 (e)-25 Units	Replace Parking Lot	10,625.00
	CA16P019-035 (b)-8 Units	Replace Interior Doors	8,000.00	CA16P019-034 (a)-47 Units	Security Lighting	13,000.00
		Entry Doors & Screens	6,660.00	CA16P019-034 (b)-8 Units	Water Heaters	14,875.00
		Water Heaters	5,400.00		Concrete	8,250.00
	CA16P019-035(c)-15 Units	Security Lighting	6,200.00	CA16P019-035 (c)-15 Units	Replace Exterior Trim	11,000.00
		Evap. Coolers	16,200.00		Evap. Coolers	17,820.00
		Security Fencing	18,750.00		Entry Doors & Screens	15,200.00
		Entry Doors & Screens	12,500.00		Wall Furnaces/FAU's	18,450.00
		Water Heaters	10,125.00		Water Heaters	11,025.00
	CA16P019-035 (e)-8 Units	Concrete	10,000.00	CA16P019-035 (d)-27 Units	Exterior Doors	10,250.00
		Entry Doors & Screens	6,660.00	CA16P019-035 (e)-8 Units	Concrete	11,000.00
		Water Heaters	5,400.00		Water Heaters	5,940.00
		Carport Roofing	7,500.00	CA16P019-036 (a)-6 Units	Wall Furnaces/FAU's	7,425.00
		Evap. Coolers	8,640.00	CA16P019-036 (b)-13 Units	Water Heaters	4,500.00
	CA16P019-036 (a)-6 Units	Replace Interior Doors	3,500.00		CA16P019-036 (b)-13 Units	Entry Doors & Screens
		Wall Furnaces/FAU's	6,750.00	CA16P019-042 (b)-16 Units	Concrete	12,525.00
		Entry Doors & Screens	4,995.00	CA16P019-042 (b)-16 Units	Security Lighting	4,400.00
		Water Heaters	4,050.00		CA16P019-042 (d)-31 Units	Concrete
	CA16P019-042 (c)-22 Units	Entry Doors & Screens	18,315.00			
		Replace Interior Doors	19,500.00			
		Security Lighting	5,500.00			
		Evap. Coolers	23,760.00			
	Subtotal CFP Estimated Cost			\$329,280.00		

Capital Fund Program Five -Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year: 2 FFY Grant: CA16-P019-501-04 PHA FY: 2004			Activities for Year: 3 FFY Grant: CA16-P019-501-05 PHA FY: 2005		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	CA16P019-042 (c)-22 Units	Water Heaters	\$14,103.00			
		Wall Furnaces/FAUs	24,750.00			
	PHA Wide	LBP Abatement	61,000.00	PHA Wide	LBP Abatement	\$41,000.00
		Modernize Units	429,714.00		Modernize Units	600,649.00
		Roofing	50,000.00		Roofing	50,000.00
		Concrete	50,000.00		Concrete	50,000.00
		Fencing	50,000.00		Fencing	50,000.00
		Landscaping/Grading	80,000.00		Landscaping/Grading	75,000.00
		Security Lights	32,796.00		Security Lights	29,796.00
		Water Heaters	33,750.00		Water Heaters	33,750.00
		Evap. Coolers/AC's	54,000.00		Evap. Coolers/AC's	54,000.00
		Wall Furnaces/FAU's	56,250.00		Wall Furnaces/FAU's	56,250.00
		Flooring	75,000.00		Flooring	75,000.00
		Window Treatments	49,100.00		Window Treatments	49,100.00
		Replace Stove/etc.	35,000.00		Replace Stove/etc.	35,000.00
	PHA Management Improvement.	Family Self Sufficiency	81,000.00	PHA Management Improvements.	Family Self Sufficiency	108,000.00
		Welfare Reform Initiatives	225,000.00		Welfare Reform Initiatives	45,000.00
		Fair Housing	22,500.00		Fair Housing	22,500.00
		Economic Development	135,000.00		Economic Development	45,000.00
		Homeownership	72,000.00		Homeownership	126,000.00
		Resident Management Training	27,000.00		Staff Development	67,500.00
		Staff Development	45,000.00		Resident Programs	67,500.00
		Security	27,000.00		Computer System Upgrade	144,000.00
Tenant Accounting Upgrade		36,000.00				
Human Resources Program	13,500.00					
Subtotal CFP Estimated Cost			\$1,729,463.00			\$1,825,045.00

Capital Fund Program Five -Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year: 2 FFY Grant: CA16-P019-501-04 PHA FY: 2004			Activities for Year: 3 FFY Grant: CA16-P019-501-05 PHA FY: 2005		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	PHA Management Improvements.	Inventory Management System	\$22,500.00			
		Preventive Maintenance Evaluation	36,000.00			
		PHAS Reporting System Upgrade	22,500.00			
	Non-Dwelling Structures & Equipment		225,000.00	Non-Dwelling Structures & Equipment		\$225,000.00
	Operations		907,117.00	Operations		907,117.00
	Other	Fees & Costs	250,000.00	Other	Fees & Costs	250,000.00
		Relocation	10,000.00		Relocation	10,000.00
		Contingency	362,847.00		Contingency	362,847.00
	Administration		400,000.00	Administration		400,000.00
	Subtotal CFP Estimated Cost			\$2,235,964.00		
Total CFP Estimated Cost			\$4,485,587.00			\$4,535,586.00

7. Capital Improvement Needs

A. Capital Fund Activities

(2) Optional 5-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year: 4 FFY Grant: CA16-P019-501-06 PHA FY: 2006			Activities for Year: 5 FFY Grant: CA16-P019-501-07 PHA FY: 2007		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	CA16P019-017 (b)-7 Units	Flooring	\$10,500.00	CA16P019-009-20 Units	Security Fencing	\$37,600.00
		Rain Gutters	3,978.00	CA16P019-010-40 Units	Security Porch Lighting	1,500.00
	CA16P019-018 (b)-13 Units	Resurface Parking Areas	12,500.00	CA16P019-019-24 Units	Water Service Upgrade	59,753.00
		Replace Windows	27,000.00		Replace Windows	55,500.00
	CA16P019-020-8 Units	Security Fencing	7,500.00	CA16P019-024-8 Units	Evap. Coolers	12,500.00
	CA16P019-024-8 Units	Security Fencing	7,500.00	CA16P019-030-10 Units	Security Lighting	7,500.00
		Flooring	12,000.00		Replace Windows	42,525.00
	CA16P019-025-10 Units	Remodel Bathrooms	50,000.00	CA16P019-031 (e)-24 Units	Security Fencing	25,500.00
	CA16P019-027-10 Units	Resurface Parking Areas	17,500.00	CA16P019-032 (a)-20 Units	Entry Doors & Screens	12,000.00
		Rain Gutters	7,500.00	CA16P019-032 (b)-20 Units	Carpports	92,500.00
	CA16P019-031 (b)-9 Units	Flooring	13,500.00	CA16P019-032 (c)-43 Units	Replace Windows	75,000.00
		Repair Laundry Rooms	9,500.00	CA16P019-035 (a)-12 Units	Security Lighting	4,500.00
	CA16P019-031 (c)-9 Units	Flooring	13,500.00	CA16P019-035 (e)-8 Units	Water Heaters	12,500.00
		Repair Laundry Room	9,500.00		Security Fencing	22,500.00
	CA16P019-031 (d)-10 Units	Repair Laundry Room	8,500.00		Security Lighting	3,250.00
		Rain Gutters	2,500.00	Evap. Coolers	12,500.00	
	CA16P019-032 (d)-6 Units	Replace Windows	24,000.00	CA16P019-036 (b)-13 Units	Resurface Parking Areas	15,000.00
		Replace Driveways	11,625.00	CA16P019-042 (a)-19 Units	Security Fencing	25,500.00
		Security Fencing	5,875.00	CA16P019-042 (b)-19 Units	Security Fencing	25,500.00
		Flooring	9,000.00			
	CA16P019-032 (e)-25 Units	Security Fencing	16,575.00			
		Flooring	22,500.00			
	Subtotal CFP Estimated Cost			\$303,300.00		

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: 4 FFY Grant: CA16-P019-501-06 PHA FY: 2006			Activities for Year: 5 FFY Grant: CA16-P019-501-07 PHA FY: 2007			
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost	
See Annual Statement	CA16P019-034 (b)-8 Units	Replace Parking Lot	\$5,750.00				
		Replace Exterior Trim	2,000.00				
	CA16P019-034 (b)-8 Units	Replace Windows	10,200.00				
	CA16P019-035 (a)-12 Units	Replace Windows	15,800.00				
	CA16P019-035 (b)-8 Units	Flooring	12,000.00				
		Garage Doors	5,500.00				
	CA16P019-035 (c)-15 Units	Replace Windows	15,000.00				
	CA16P019-035 (d)-27 Units	Insulate Attics/etc.	6,200.00				
	CA16P019-035 (e)-8 Units	Resurface Parking Lot	5,250.00				
		Flooring	12,000.00				
		Replace Windows	10,200.00				
	CA16P019-036 (a)-6 Units	Flooring	9,000.00				
		Roofing	16,500.00				
	CA16P019-042 (c)-22 Units	Landscape Sprinklers	9,800.00				
		Garage Doors	28,875.00				
	PHA Wide	PHA Wide	LBP Abatement	86,000.00	PHA Wide	LBP Abatement	\$50,000.00
			Modernize Units	603,099.00		Modernize Units	360,099.00
			Roofing	50,000.00		Roofing	75,000.00
			Concrete	50,000.00		Concrete	50,000.00
			Fencing	50,000.00		Fencing	50,000.00
			Landscaping/Grading	100,000.00		Landscaping/Grading	89,100.00
			Security Lights	32,796.00		Security Lights	32,796.00
			Water Heaters	33,750.00		Water Heaters	33,750.00
Evap. Coolers/AC's			54,000.00	Evap. Coolers/AC's		40,000.00	
Wall Furnaces/FAUs			56,250.00	Wall Furnaces/FAUs		56,250.00	
Flooring			75,000.00	Flooring		50,000.00	
Window Treatments			49,100.00	Window Treatments		20,000.00	
Subtotal CFP Estimated Cost			\$1,404,070.00	\$906,995.00			

7. Capital Improvement Needs

B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

- Yes No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)
b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name:
2. Development (project) number:
3. Status of grant: (select the statement that best describes the current status)

- Revitalization Plan under development
 Revitalization Plan submitted, pending approval
 Revitalization Plan approved
 Activities pursuant to an approved Revitalization Plan underway

- Yes No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?
If yes, list development name/s below:

- Yes No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?
If yes, list developments or activities below:

- Yes No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?
If yes, list developments or activities below:

Replacement funds will be used for a down payment to acquire a pre-existing four-plex according to §941.102 a3 in FY 2003 to replace four units, which were demolished. Acquisitions personnel are currently searching for an appropriate site for project 19-043.

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1. Yes No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to Section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)

2. Activity Description

- Yes No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)

Demolition/Disposition Activity Description	
1a. Development name:	
1b. Development (project) number:	
2. Activity type: Demolition <input type="checkbox"/>	
Disposition <input type="checkbox"/>	
3. Application status (select one)	
Approved <input type="checkbox"/>	
Submitted, pending approval <input type="checkbox"/>	
Planned application <input type="checkbox"/>	
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)	
5. Number of units affected:	
6. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	
7. Timeline for activity:	
a. Actual or projected start date of activity:	
b. Projected end date of activity:	

9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

1. Yes No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by Section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description

Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.

Designation of Public Housing Activity Description	
1a. Development name:	803 W Brockton Ave
1b. Development (project) number:	CA16P019009
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA’s Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission:	<u>07/02/61</u>
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously approved Designation Plan?
6. Number of units affected:	20
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities

2. Activity Description

Designation of Public Housing Activity Description
1a. Development name: Mt. Vernon Manor 1b. Development (project) number: CA16P019010
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>29/11/67</u>
5. If approved, will this designation constitute a (select one) <input type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously approved Designation Plan?
7. Number of units affected: 40 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description
1a. Development name: Barstow Seniors Complex 1b. Development (project) number: CA16P019012
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>01/02/72</u>
5. If approved, will this designation constitute a (select one) <input type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously approved Designation Plan?
8. Number of units affected: 40 7. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

A. Assessments of Reasonable Revitalization Pursuant to Section 202 of the HUD FY 1996 HUD Appropriations Act

1. Yes No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under Section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

2. Activity Description

- Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

Conversion of Public Housing Activity Description
1a. Development name: 1b. Development (project) number:
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)
4. Status of Conversion Plan (select the statement that best describes the current status) <input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway

10. Conversion of Public Housing to Tenant-Based Assistance

A. Assessments of Reasonable Revitalization Pursuant to Section 202 of the HUD FY 1996 HUD Appropriations Act

2. Activity Description

5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)

- Units addressed in a pending or approved demolition application (date submitted or approved: _____)
- Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____)
- Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____)
- Requirements no longer applicable: vacancy rates are less than 10 percent
- Requirements no longer applicable: site now has less than 300 units
- Other: (describe below)

B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937

C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. Yes No: Does the PHA administer any homeownership programs administered by the PHA under an approved Section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under Section 5(h), the HOPE I program, or Section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

2. Activity Description

- Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: Scattered Sites 1b. Development (project) number: CA16-P019-017
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input checked="" type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (20/05/2003)
5. Number of units affected: 9 6. Coverage of action: (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development

11. Homeownership Programs Administered by the PHA

A. Public Housing

2. Activity Description

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: Scattered Sites 1b. Development (project) number: CA16-P019-032
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input checked="" type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA's Homeownership Plan/Program <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: <u>(20/05/2003)</u>
6. Number of units affected: 20 6. Coverage of action: (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: Scattered Sites 1b. Development (project) number: CA16-P019-035
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input checked="" type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA's Homeownership Plan/Program <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: <u>(20/05/2003)</u>
7. Number of units affected: 21 6. Coverage of action: (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development

11. Homeownership Programs Administered by the PHA

A. Public Housing

2. Activity Description

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: Scattered Sites 1b. Development (project) number: CA16-P019-042
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input checked="" type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA's Homeownership Plan/Program <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: <u>(20/05/2003)</u>
8. Number of units affected: 73 6. Coverage of action: (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development

11. Homeownership Programs Administered by the PHA

B. Section 8 Tenant Based Assistance

1. Yes No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to component 12; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

a. Size of Program

- Yes No: Will the PHA limit the number of families participating in the Section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- 25 or fewer participants
 26 - 50 participants
 51 to 100 participants
 more than 100 participants

b. PHA-established eligibility criteria

- Yes No: Will the PHA’s program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?

If yes, list criteria below:

12. PHA Community Service and Self-Sufficiency Programs

[24 CFR Part 903.7 9 (l)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

14. PET POLICY

[24 CFR Part 903.7 9 (n)]

Ownership Conditions. A resident of a dwelling unit in public housing may have one (1) or more common household pets present in the dwelling unit if the resident maintains each pet:

- A. Responsibly;
- B. In accordance with applicable California and local health, animal control, and animal anti-cruelty laws and regulations.

Neutered. All cats and dogs will be neutered upon reaching the age of reproductive maturity.

Additional Requirements. Pets kept on premises will be subject to the following requirements:

- A. Payment of a non-refundable nominal fee of twenty-five dollars (\$25) per pet;
- B. A refundable deposit of one hundred dollars (\$100) per pet to cover the cost of cleaning or fumigating the premises or repairing any damages caused by or in connection with the pet;
- C. Resident is liable for any cost in excess of nominal fee and deposit; and
- D. Pets must be inoculated in accordance with California and local laws.

Pet Restraint. All cats and dogs must be appropriately and effectively restrained and under the control of a responsible individual while on the common areas of the project.

Registration. Pet owners must register their pets with the Housing Authority (Authority) before it is brought onto the project premises, and must update the registration at least annually. The registration must include:

- A. A certificate signed by a licensed veterinarian stating that the pet has received all inoculations required by applicable State and local laws; and has been neutered in accordance with Sec. 9.01 of the Authority's Statement of Policies and Conditions Governing Admissions and Continued Occupancy;
- B. Information sufficient to identify the pet and to demonstrate that it is a common household pet;

14. PET POLICY

Registration.

- C. The name, address, and phone number of one or more responsible parties who will care for the pet if the pet owner dies, is incapacitated, or is otherwise unable to care for the pet; and
- D. A photograph of each pet to be kept in unit.

Refusal to Register Pet. The Authority will refuse to register the pet if:

- A. The pet is not a common household pet;
- B. The keeping of the pet would violate any applicable house pet rule;
- C. The pet owner fails to provide complete pet registration information or fails annually to update the pet registration; or
- D. The Authority reasonably determines, based on the pet owner's habits and practices, that the pet owner will be unable to keep the pet in compliance with the pet rules and other lease obligations. The pet's temperament may be considered as a factor in determining the prospective pet owner's ability to comply with the pet rules and other lease obligations.

Notice. The pet rules shall require the project owner to notify the pet owner if the project owner refuses to register a pet. The notice shall state the basis for the action.

Limitations on the Number of Animals in a Unit Based on Unit Size. The number of pets will not exceed two (2) per household.

Prohibitions Against Dangerous Animals and Other Animals. No pet may be kept on the premises that has a known propensity for disturbing neighbors, is liable to cause personal injury to humans or other pets, or is liable to cause damage to the premises or grounds. Only domesticated animals as defined by California State law may be kept on the premises.

Size and Weight. No pet in excess of twenty (20) pounds may be kept on the premises. The height will be no greater than ten inches at the shoulder.

14. PET POLICY

Responsibility of Tenant With Regard to Pet(s).

- A. Tenant shall not permit the pet to cause any damage, discomfort, annoyance, nuisance, or in any way inconvenience or cause complaints from any other tenant or neighbor;
- B. All animal waste from litter boxes or cages is to be picked up and disposed of in sealed plastic bags and placed in the appropriate garbage receptacle;
- C. Birds will be properly caged; and
- D. No pet may be kept for the purpose of commercial breeding.

Removal of Pet. Any pet that disturbs the peace and quiet of other tenants or neighbors through noise (barking, etc.) odors, animal waste, biting, scratching, aggressive or inappropriate behavior, or other nuisance must be removed from the premises.

Notice of Pet Rule Violation. If the Authority determines on the basis of objective facts, supported by written statements, that a pet owner has violated a rule governing the owning or keeping of pets, the Authority may serve a written notice of pet rule violation on the pet owner. The notice of pet rule violation must:

- A. Contain a brief statement of the factual basis for the determination and the pet rule or rules alleged to be violated;
- B. State that the pet owner has ten (10) days from the effective date of service of the notice to correct the violation (including removal of the pet) or to make a written request for a meeting to discuss the violation;
- C. State that the pet owner is entitled to be accompanied by another person of his or her choice at the meeting; and
- D. State that the pet owner's failure to correct the violation, to request a meeting, or to appear at a requested meeting may result in initiation of procedures to terminate the pet owner's tenancy.

Pet Rule Violation Meeting. If the pet owner makes a timely request for a meeting to discuss an alleged pet rule violation, the Authority will establish a mutually agreeable time and place for the meeting but no later than fifteen (15) days from the effective date of service of the notice of pet rule violation (unless the Authority agrees to a later date). At the pet rule violation meeting, the pet owner and Authority shall discuss any alleged pet rule violation and attempt to correct it. The Authority may, as a result of the meeting, give the pet owner additional time to correct the violation.

14. PET POLICY

Notice for Pet Removal. If the pet owner and Authority are unable to resolve the pet rule violation at the pet rule violation meeting, or if the Authority determines that the pet owner has failed to correct the pet rule violation within any additional time provided for this purpose, the Authority will serve a written notice on the pet owner requiring the pet owner to remove the pet. The notice will:

- A. Contain a brief statement of the factual basis for the determination and the pet rule or rules that have been violated;
- B. State that the pet owner must remove the pet within ten (10) days of the effective date of service of the notice of pet removal (or the meeting, if notice is served at the meeting); and
- C. State that failure to remove the pet may result in initiation of procedures to terminate the pet owner's tenancy.

Protection of the Pet.

- A. If the health or safety of a pet is threatened by the death or incapacity of the pet owner, or by other factors that render the pet owner unable to care for the pet, the Authority may contact the responsible party or parties listed in the pet registration required under Sec. 9.04 of the Authority's Statement of Policies and Conditions Governing Admissions and Continued Occupancy;
- B. If the responsible party or parties are unwilling or unable to care for the pet, or the Authority, despite reasonable efforts, has been unable to contact the responsible party or parties, the Authority may contact the appropriate California or local authority (or designated agent of such an authority) and request the removal of the pet;
- C. If there is no State or local authority (or designated agent of such an authority) authorized to remove a pet under these circumstances the Authority may enter the pet owner's unit, as provided in Sec. 5.31 of the Authority's Statement of Policies and Conditions Governing Admissions and Continued Occupancy to remove the pet, and place the pet in a facility that will provide care and shelter until the pet owner or a representative of the pet owner is able to assume responsibility for the pet, but not longer than thirty (30) days.
- D. The cost of the animal care facility provided under this section shall be borne by the pet owner. If the pet owner (or the pet owner's estate) is unable or unwilling to pay, the cost of the animal care facility may be paid from the deposit.

14. PET POLICY

Initiation of Procedures to Remove a Pet or Terminate the Pet Owner's Tenancy. The Authority may not initiate procedures to terminate a pet owner's tenancy based on a pet rule violation, unless:

- A. The pet owner has failed to remove the pet or correct a pet rule violation within the applicable time period specified in this section (including any additional time permitted by the Authority); and
- B. The pet rule violation is sufficient to begin procedures to terminate the pet owner's tenancy under the terms of the lease and applicable regulations.

Grounds For Termination of Lease. Failure to remove an unregistered pet from premises will be grounds for termination of lease in accordance with Sections 5.20–.23 of the Authority's Statement of Policies and Conditions Governing Admissions and Continued Occupancy.

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

- 1. Yes No: Is the PHA required to have an audit conducted under Section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?
(If no, skip to component 17.)
- 2. Yes No: Was the most recent fiscal audit submitted to HUD?
- 3. Yes No: Were there any findings as the result of that audit?
- 4. Yes No: If there were any findings, do any remain unresolved?
If yes, how many unresolved findings remain? _____
- 5. Yes No: Have responses to any unresolved findings been submitted to HUD?
If not, when are they due (state below)?

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: High performing and small PHAs are not required to complete this component.

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
 - Attached at Attachment (File name)
 - Provided below:
 - a. Provide better security (e.g., lighting, senior security, etc.).
 - b. Increase the size of the print on the lease agreements.
 - c. Provide more education to the residents about public housing rules and regulations.
 - d. Hold head of households responsible for their children and visitors.
 - e. Offer drug counseling to residents.
 - f. Develop a buddy system for the elderly.
 - g. Develop a uniform grievance and complaint form for tenant use, and place these forms at all management points.
 - h. Address the human needs of the families living in public housing, and you will see more harmony within each neighborhood.
 - i. Create an aggressive advertising campaign that encourages private owners to rent to Section 8 tenants.
 - j. Replace private management companies with Housing Authority staff.
 - k. Survey all members of the families including children.
 - l. Encourage teenagers to assist the elderly and disabled neighbors with tasks, such as watering the grass and putting out the trash.
 - m. Develop some specific public relations activities.

3. In what manner did the PHA address those comments? (select all that apply)
 - Considered comments, but determined that no changes to the PHA Plan were necessary.
 - The PHA changed portions of the PHA Plan in response to comments
List changes below:
 - Other: (list below)

18. Other Information

B. Description of Election process for Residents on the PHA Board

1. Yes No: Does the PHA meet the exemption criteria provided Section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2. Yes No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

a. Nomination of candidates for place on the ballot: (select all that apply)

- Candidates were nominated by resident and assisted family organizations
- Candidates could be nominated by any adult recipient of PHA assistance
- Self-nomination: Candidates registered with the PHA and requested a place on ballot
- Other: (describe)

b. Eligible candidates: (select one)

- Any recipient of PHA assistance
- Any head of household receiving PHA assistance
- Any adult recipient of PHA assistance
- Any adult member of a resident or assisted family organization
- Other (list)

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and Section 8 tenant-based assistance)
- Representatives of all PHA resident and assisted family organizations
- Other (list)

18. Other Information

C. Statement of Consistency with the Consolidated Plan

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

County of San Bernardino

1. Consolidated Plan jurisdiction: (County of San Bernardino)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

City of San Bernardino

1. Consolidated Plan jurisdiction: (City of San Bernardino)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

18. Other Information

C. Statement of Consistency with the Consolidated Plans

City of Fontana

1. Consolidated Plan jurisdiction: (City of Fontana)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

City of Ontario

1. Consolidated Plan jurisdiction: (City of Ontario)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

18. Other Information

C. Statement of Consistency with the Consolidated Plans

City of Chino

1. Consolidated Plan jurisdiction: (City of Chino)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

City of Rancho Cucamonga

1. Consolidated Plan jurisdiction: (City of Rancho Cucamonga)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

18. Other Information

C. Statement of Consistency with the Consolidated Plans

City of Victorville

1. Consolidated Plan jurisdiction: (City of Victorville)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

City of Rialto

1. Consolidated Plan jurisdiction: (City of Rialto)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

18. Other Information

C. Statement of Consistency with the Consolidated Plans

City of Hesperia

1. Consolidated Plan jurisdiction: (City of Hesperia)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

Town of Apple Valley

1. Consolidated Plan jurisdiction: (Town of Apple Valley)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

D. Other Information Required by HUD

Use this section to provide any additional information requested by HUD.

Attachments

Attachment A

Capital Fund Program (CFP) Grant Number: CA16-P019-501-02 Federal FY of Grant: 2002 Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino				<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003	
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Costs	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	\$1,007,908.00	\$1,007,908.00	\$15,000.00	\$15,000.00
3	1408 Management Improvements	790,000.00	790,000.00	790,000.00	98,712.06
4	1410 Administration	410,100.00	410,100.00	178,328.44	144,899.55
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	250,000.00	250,000.00	250,000.00	111,724.05
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	429,500.00	330,000.00	276,533.92	136,817.20
10	1460 Dwelling Structures	1,336,030.00	1,626,397.83	1,538,739.48	723,948.65
11	1465.1 Dwelling Equipment-Nonexpendable	277,840.00	290,000.00	260,467.79	164,817.24
12	1470 Nondwelling Structures	100,000.00	100,000.00	75,000.00	23,071.51
13	1475 Nondwelling Equipment	25,000.00	150,000.00	129,988.39	50,987.81
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	10,000.00	10,000.00	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collateralization of Debt Service	-	-	-	-
20	1502 Contingency	403,163.00	75,135.17	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	5,039,541.00	5,039,541.00	3,514,058.02	1,469,978.07
22	Amount of line 21 Related to LBP Activities	200,000.00	2,935.00	2,935.00	2,935.00
23	Amount of line 21 Related to Section 504 Compliance	61,301.10	67,391.93	62,272.24	30,767.49
24	Amount of line 21 Related to Security – Soft Costs	31,600.00	31,600.00	31,600.00	3,948.48
25	Amount of line 21 Related to Security – Hard Costs	220,625.00	80,000.00	41,913.26	33,479.07
26	Amount of line 21 Related to Energy Conservation Measures	408,674.00	449,279.57	415,148.24	205,116.62

Attachment A

Capital Fund Program (CFP) Grant Number: CA16-P019-501-02 Federal FY of Grant: 2002 Part II: Supporting Pages							
PHA Name: Housing Authority of the County of San Bernardino			<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003				
Development No./HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Costs		Total Actual Costs		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
19-017 (a)	Entry Doors & Screens	1460.00	\$14,975.00	\$14,975.00	\$14,975.00	\$4,699.00	Ongoing
	Concrete	1450.00	15,000.00	-	-	-	Deferred to HA
	Evap. Coolers/AC's	1465.10	16,425.00	-	-	-	Deferred to HA
	Security Lighting	1450.00	7,500.00	-	-	-	Deferred to HA
	Wall Furnaces/FAU's	1465.10	17,750.00	-	-	-	Deferred to HA
19-018 (b)	Security Fencing	1450.00	16,500.00	-	-	-	Deferred to HA
	Replace Interior Doors	1460.00	19,250.00	19,250.00	19,250.00	-	Ongoing
	Concrete	1450.00	16,000.00	-	-	-	Deferred to HA
	Security Lighting	1450.00	6,500.00	-	-	-	Deferred to HA
19-021	Replace Interior Doors	1460.00	4,500.00	4,500.00	4,500.00	-	Completed
	Entry Doors & Screens	1460.00	1,665.00	1,665.00	1,665.00	-	Completed
	Evap. Coolers/AC's	1465.10	2,160.00	-	-	-	Deferred to HA
19-025	Security Fencing	1450.00	10,000.00	-	-	-	Deferred to HA
	Replace Interior Doors	1460.00	22,500.00	22,500.00	22,500.00	-	Ongoing
	Security Lighting	1450.00	8,000.00	-	-	-	Deferred to HA
	Evap. Coolers/AC's	1465.10	10,800.00	-	-	-	Deferred to HA
19-028	Entry Doors & Screens	1460.00	8,325.00	8,325.00	8,325.00	-	Ongoing
	Replace Interior Doors	1460.00	22,500.00	22,500.00	22,500.00	-	Ongoing
	Security Fencing	1450.00	10,875.00	-	-	-	Deferred to HA
	Resurface Parking Areas	1450.00	10,625.00	-	-	-	Deferred
	Evap. Coolers/AC's	1465.10	10,800.00	-	-	-	Deferred to HA
19-029	Security Fencing	1450.00	16,250.00	-	-	-	Deferred to HA
	Replace Interior Doors	1460.00	22,500.00	22,500.00	22,500.00	-	Ongoing
	Security Lighting	1450.00	8,000.00	-	-	-	Deferred to HA
	Evap. Coolers/AC's	1465.10	10,800.00	-	-	-	Deferred to HA

Capital Fund Program (CFP) Grant Number: CA16-P019-501-02 Federal FY of Grant: 2002							
Part II: Supporting Pages							
PHA Name: Housing Authority of the County of San Bernardino		<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003					
Development No./HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Costs		Total Actual Costs		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
19-030	Entry Doors & Screens	1460.00	1,325.00	247.83	247.83	247.83	Completed
	Replace Interior Doors	1460.00	22,500.00	22,500.00	22,500.00	10,000.00	Ongoing
	Evap. Coolers/AC's	1465.10	10,800.00	-	-	-	Deferred to HA
	Security Fencing	1450.00	7,750.00	-	-	-	Deferred to HA
10-031 (a)	Replace Interior Doors	1460.00	24,750.00	24,750.00	24,750.00	-	Ongoing
	Evap. Coolers/AC's	1465.10	11,880.00	-	-	-	Deferred to HA
	Water Heaters	1465.10	7,425.00	-	-	-	Deferred to HA
	Security Lighting	1450.00	4,000.00	-	-	-	Deferred to HA
19-035 (c)	Replace Interior Doors	1460.00	33,750.00	33,750.00	33,750.00	10,033.37	Ongoing
	Flooring	1460.00	22,500.00	-	-	-	Deferred to HA
19-035 (d)	Flooring	1460.00	21,750.00	-	-	-	Deferred to HA
	Replace Interior Doors	1460.00	60,750.00	60,750.00	60,750.00	5,000.00	Ongoing
19-042 (d)	Flooring	1460.00	27,750.00	-	-	-	Deferred to HA
	Security Porch Lights	1460.00	7,750.00	-	-	-	Deferred to HA
PHA Wide	LBP Abatement	1460.00	200,000.00	2,935.00	2,935.00	2,935.00	Ongoing
	Modernize Units	1460.00	615,740.00	1,000,250.00	953,205.23	529,275.64	Ongoing
	Roofing	1460.00	75,000.00	65,000.00	57,224.55	25,581.98	Ongoing
	Concrete	1450.00	75,000.00	150,000.00	94,989.66	62,775.13	Ongoing
	Fencing	1450.00	75,000.00	50,000.00	24,238.81	24,238.81	Ongoing
	Landscaping/Grading	1450.00	100,000.00	100,000.00	100,000.00	22,167.47	Ongoing
	Security Lighting	1450.00	42,500.00	30,000.00	17,674.45	9,240.26	Deferred to HA
	Water Heaters	1465.10	33,750.00	85,000.00	74,009.39	43,026.47	Ongoing
	Evap. Coolers/AC's	1465.10	54,000.00	75,000.00	65,767.67	54,841.90	Ongoing
	Wall Furnaces/FAU's	1465.10	56,250.00	95,000.00	85,690.73	60,289.61	Ongoing
	Flooring	1460.00	56,250.00	250,000.00	186,379.83	90,867.45	Ongoing
	Window Treatments	1460.00	50,000.00	50,000.00	50,000.00	21,245.06	Ongoing
	Replace Stoves/etc.	1465.10	35,000.00	35,000.00	35,000.00	6,659.26	Ongoing
	Non-Dwelling Structures	1470.00	100,000.00	100,000.00	75,000.00	23,071.51	Ongoing
	Non-Dwelling Equipment	1475.00	25,000.00	150,000.00	129,988.39	50,987.81	Ongoing
Operations	1406.00	1,007,908.00	1,007,908.00	15,000.00	15,000.00	Ongoing	

Capital Fund Program (CFP) Grant Number: CA16-P019-501-02 Federal FY of Grant: 2002
 Part II: Supporting Pages

PHA Name: Housing Authority of the County of San Bernardino **Performance and Evaluation Report for Program Year Ending 03/31/2003**

Development No./HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Costs		Total Actual Costs		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	Fees & Costs	1430.00	250,000.00	250,000.00	250,000.00	111,724.05	Ongoing
	Relocation	1495.10	10,000.00	10,000.00	-	-	On Hold
	Contingency	1502.00	403,163.00	4,722.13-	-	-	Ongoing
	Administration	1410.00	410,100.00	410,100.00	178,328.44	144,899.55	Ongoing
	Family Self Sufficiency	1408.00	125,000.00	125,000.00	125,000.00	18,912.06	Ongoing
	Welfare Reform Initiative	1408.00	175,000.00	175,000.00	175,000.00	21,000.00	Ongoing
	Fair Housing	1408.00	25,000.00	25,000.00	25,000.00	3,000.00	Ongoing
	Economic Development	1408.00	75,000.00	75,000.00	75,000.00	9,000.00	Ongoing
	Homeownership	1408.00	80,000.00	80,000.00	80,000.00	9,600.00	Ongoing
	Resident Management Training	1408.00	50,000.00	50,000.00	50,000.00	6,000.00	Ongoing
	Staff Development	1408.00	50,000.00	50,000.00	50,000.00	6,000.00	Ongoing
	Security	1408.00	30,000.00	30,000.00	30,000.00	3,600.00	Ongoing
	Accounting System Upgrade	1408.00	70,000.00	70,000.00	70,000.00	8,400.00	Ongoing
	Work Order System Upgrade	1408.00	50,000.00	50,000.00	50,000.00	6,000.00	Ongoing
	Preventative Maintenance	1408.00	60,000.00	60,000.00	60,000.00	7,200.00	Ongoing
Emergency Site Repair	1450.00	-	39,631.00	39,631.00	18,395.53	Ongoing	
Emergency Dwelling Repair	1460.00	-	30,782.04	30,782.04	24,063.32	Ongoing	

Attachment A

Capital Fund Program (CFP) Grant Number: CA16-P019-501-02 Federal FY of Grant: 2002							
Part III: Implementation							
PHA Name: Housing Authority of the County of San Bernardino				<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003			
Development No./HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
19-017 (a)	March 2004			September 2005			
19-018 (b)	March 2004			September 2005			
19-021	March 2004			September 2005			
19-025	March 2004			September 2005			
19-028	March 2004			September 2005			
19-029	March 2004			September 2005			
19-030	March 2004			September 2005			
19-031 (a)	March 2004			September 2005			
19-035 (c)	March 2004			September 2005			
19-035 (d)	March 2004			September 2005			
19-042 (d)	March 2004			September 2005			
PHA Wide	March 2004			September 2005			

Attachment B

Capital Fund Program (CFP) Grant Number: CA16-R019-501-00 Federal FY of Grant: 2000 Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino		<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003			
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Costs	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	-	-	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	-	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	-	-	-	-
11	1465.1 Dwelling Equipment-Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	\$18,340.00	-	\$18,340.00	\$18,340.00
19	1501 Collateralization of Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$18,340.00	-	\$18,340.00	\$18,340.00
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security – Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security – Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conservation Measures	-	-	-	-

Attachment B

Capital Fund Program (CFP) Grant Number: CA16-R019-501-00 Federal FY of Grant: 2000 Part II: Supporting Pages							
PHA Name: Housing Authority of the County of San Bernardino			<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003				
Development No./HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Costs		Total Actual Costs		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
19-043	Replacement Housing Factor	1499.00	\$18,340.00	-	\$18,340.00	\$18,340.00	Investment Status

Capital Fund Program (CFP) Grant Number: CA16-R019-501-00 Federal FY of Grant: 2000 Part III: Implementation							
PHA Name: Housing Authority of the County of San Bernardino			<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003				
Development No./HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
19-043	March 2002		March 2002	September 2003		June 2002	

Attachment C

Capital Fund Program (CFP) Grant Number: CA16-R019-501-01 Federal FY of Grant: 2001 Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino		<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003			
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Costs	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds	-	-	-	-
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	-	-	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	-	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	-	-	-	-
11	1465.1 Dwelling Equipment-Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	\$25,014.00	-	\$25,014.00	\$25,014.00
19	1501 Collateralization of Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$25,014.00	-	\$25,014.00	\$25,014.00
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security – Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security – Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conservation Measures	-	-	-	-

Attachment C

Capital Fund Program (CFP) Grant Number: CA16-R019-501-01 Federal FY of Grant: 2001 Part II: Supporting Pages							
PHA Name: Housing Authority of the County of San Bernardino			<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003				
Development No./HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Costs		Total Actual Costs		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
19-043	Replacement Housing Factor	1499.00	\$25,014.00	-	\$25,014.00	\$25,014.00	Investment Status

Capital Fund Program (CFP) Grant Number: CA16-R019-501-01 Federal FY of Grant: 2001 Part III: Implementation							
PHA Name: Housing Authority of the County of San Bernardino			<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003				
Development No./HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
19-043	March 2003		March 2002	September 2004		June 2002	

Attachment D

Capital Fund Program (CFP) Grant Number: CA16-R019-501-02 Federal FY of Grant: 2002 Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino		<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003			
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Costs	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	-	-	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	-	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	-	-	-	-
11	1465.1 Dwelling Equipment-Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	\$28,266.00	-	-	-
19	1501 Collateralization of Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$28,266.00	-	-	-
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security – Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security – Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conservation Measures	-	-	-	-

Attachment D

Capital Fund Program (CFP) Grant Number: CA16-R019-501-02 Federal FY of Grant: 2002 Part II: Supporting Pages							
PHA Name: Housing Authority of the County of San Bernardino			<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003				
Development No./HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Costs		Total Actual Costs		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
19-043	Replacement Housing Factor	1499.00	\$28,266.00	-	-	-	

Capital Fund Program (CFP) Grant Number: CA16-R019-501-02 Federal FY of Grant: 2002 Part III: Implementation							
PHA Name: Housing Authority of the County of San Bernardino			<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 03/31/2003				
Development No./HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
19-043	March 2004			September 2005			

Attachment E

HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO SUBSTANTIAL DEVIATION AND SIGNIFICANT AMENDMENT AGENCY ANNUAL PLAN (FYE 2003 AND 5-YEAR PLAN (FYE 2000-2004))

Definition

The Housing Authority of the County of San Bernardino will utilize the following definition of “Significant Amendment or Modification.”

The Housing Authority of the County of San Bernardino will consider the following to be “Significant Amendments or Modifications”:

- ?? Changes to rent or admissions policies or organization of the waiting list;
- ?? Additions of non-emergency work (items not included in the Annual Statement or 5-Year Action Plan) or change in use of replacement reserve funds under the Capital Fund; and
- ?? Any changes with regard to demolition or disposition, designation, homeownership programs or conversion activities.

An exception to this definition will be made for any of the above that are adopted to reflect changes in HUD regulatory requirements.

Attachment F

Statement of Progress in Meeting the 5-Year Plan Mission and Goals

The Housing Authority of the County of San Bernardino is making excellent progress in meeting its 5-year plan goals and in accomplishing its mission. During FY 2002 we applied for 100 welfare-to-work vouchers and 500 incremental vouchers. We have received 385 vouchers from HUD.

Over the past 12 months, we have increased our non-HUD affordable housing stock through a joint venture development of 68 seniors units. During FY 2003, we started joint venture development of 45 affordable seniors units and will acquire 48 family units.

In FY 2002 we achieved high performer status in both PHAS and SEMAP. We scored 94 percent in PHAS and 96 percent in SEMAP.

Our efforts to deconcentrate poverty in HUD conventional developments have been successful and have provided a good balance of lower and higher income families. Three more developments are better balanced and 23 developments show an increase in average incomes over last year. Partnerships with community service providers, nonprofit organizations, and local universities have resulted in successful self-sufficiency training programs for our residents. We have received two Resident Opportunity and Self-Sufficiency grants for a total of \$650,000 to help fund our Welfare-to-Work programs. In addition, we will receive approval for a \$1,000,000 grant from the California Workforce Investment Act Governor's Discretionary Fund.

Under the Section 8 Homeownership Program, eight families have closed escrow. We have also submitted our application to the Special Applications Center for a public housing homeownership program. We have partnered with CitiBank to make loans available. Neighborhood Housing Services has agreed to provide pre- and post-purchase counseling, education, and training.

Attachment G

Resident Membership of the PHA Governing Board

Member

Loretta Guillen
Jessie Munoz

Service

July 10, 2001 to July 1, 2003 *
August 14, 2001 to July 1, 2003 *

A resident board member is selected by the following method:

First, a candidate must be active in and have excellent participation in the PHA's Resident Advisory Board;

Second, a candidate is nominated by the Executive Director;

Third, a candidate is appointed by the chairman of the county board of supervisors and serves for a two-year term as a tenant commissioner.

* Reappointment requested from the County Board of Supervisors

Attachment H

Membership of the Resident Advisory Board (RAB)

Elisabelle Brady

Charles Browder

Loretta Guillen

Sylvia Miller

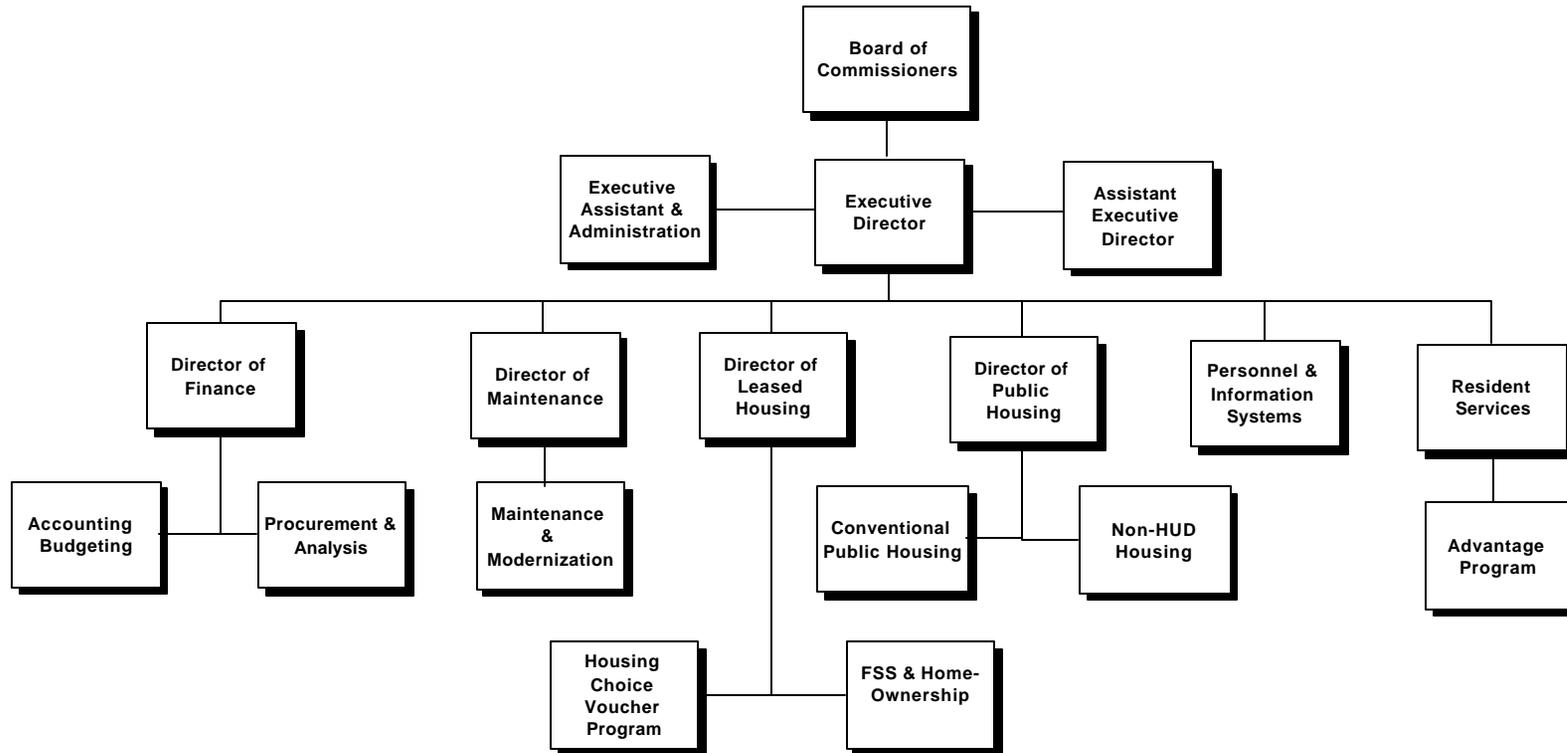
Doreen V. Morales

Jessie Munoz

Melanie Van Straten

Attachment I

Housing Authority of the County of San Bernardino Organization Chart



Attachment J

Project-Based Voucher Program

In 2002 and 2003, the Housing Authority of the County of San Bernardino (HACSB) intends to convert four hundred (400) tenant-based vouchers to project-based assistance as a demonstration program to provide housing to eligible low-income seniors. The HACSB's present portfolio includes 8,244 tenant-based units. The proposed demonstration program of four hundred project-based vouchers is approximately seven percent (7%), well within the option of converting up to twenty percent (20%) of our tenant-based voucher allocation to project-based assistance.

The general location of the project-based units is within the cities of San Bernardino, Fontana, Yucaipa, Victorville, Redlands, Montclair, and/or rural communities in the County of San Bernardino with populations of less than 15,000.

Project basing is consistent with the HACSB's Annual and Five-Year Agency Plan because project basing of the units, rather than tenant basing of the same subsidy assistance, is a more efficient and effective means of providing assistance to qualified low-income seniors. The HACSB has initially provided project-based vouchers only to government agencies and 501 (c) 3 non-profit property owners and operators of housing who demonstrated that the contract is consistent with the goals of deconcentration of poverty and of expansion of housing and economic opportunities. Project-based vouchers have not been issued in areas where the census data reflects a poverty rate in excess of twenty percent (20%).

The HACSB project-based demonstration program was needed in order to promote safe affordable housing for seniors and will improve the social and economic well being of the community. Only units that fully met federal Housing Quality Standards were provided project-based vouchers under this demonstration program. Developments near public facilities and services were favored in order to provide senior residents access to needed community resources. If this demonstration program is successful, the HACSB will expand the program to include the remainder of the county and private landlords.