



Moving to Work

Annual Plan

Fiscal Year 2009-2010

Stepping stones to an enriched quality of life...



...changing programs to accomplish the local vision.

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I. INTRODUCTION

Background – The Housing Authority of the County of San Bernardino (HACSB) has just completed its first full year as a participant in the United States Department of Housing and Urban Development’s (HUD) Moving to Work (MTW) Demonstration. Through the course of our participation, we submitted an Initial MTW Plan (for Fiscal Year 2009) to HUD, which was approved on September 25, 2008 and a Revised Initial Plan that was approved on June 29, 2009. Many of the Activities contained in the FY 2009 Annual MTW Plan will be finalized during the summer of 2009 and some have been partially implemented. As such, the FY 2010 Annual MTW Plan that the HACSB has prepared continues to articulate the initial vision of the Agency that was recently presented to HUD but also proposes a number of additional Activities to further the operational efficiency of HACSB, the self-sufficiency of its clients and the expansion of housing opportunities. Through these on-going and new MTW Activities, HACSB will continue to move closer to meeting its MTW Goals and Objectives.

Overview of Agency’s Goals and Objectives - As the Agency has begun implementing its local MTW Program, HACSB has been guided by its long-term MTW goals as well as its 30 year Strategic Plan, Mission, Vision and Values.

Through the MTW program, HACSB aims to accomplish the following goals:

- ***Operational efficiency through innovation*** – *Maximizing HACSB’s economic viability and sustainability*
- ***Self-Sufficiency*** – *Facilitating opportunities for families and individuals to become self-sufficient and financially independent to transition from dependency on housing subsidy*
- ***Expand housing opportunities through repositioned assets*** – *Providing quality affordable housing opportunities in mixed-income communities with access to excellent quality of life services*

Operational Efficiency Through Innovation - One of the key benefits of participating in MTW is regulatory relief that allows HACSB to streamline its business processes to operate more cost-effectively and efficiently. HACSB will maximize this flexibility and implement innovative business solutions, amend policies, and redesign processes and procedures that will reduce administrative complexity, costs and staff time. MTW activities implemented under the goal of operational efficiency and innovation will improve staff morale, reduce program fraud, increase accuracy, and make the program more understandable to the community and clients.

Promote Self-Sufficiency - Building on the success of its affordable housing programs and increased flexibility provided through the MTW demonstration, HACSB has developed strategies to increase family self-sufficiency.

Expand Housing Opportunities through Repositioned Assets - Creating quality housing choice for low-income families is a top priority of the HACSB. Through its Initial Plan the Agency has already begun repositioning assets in order to better serve the community.

New Activities - The Agency will be implementing the following MTW Activities in FY 2010.

	Activity	Plan Year Adopted	Goal
13	Local Inspection Standards	FY 2010	Operational Efficiency
14	Local Asset Management Program	FY 2010	Operational Efficiency
15	Pilot Work Requirement	FY 2010	Self-Sufficiency

Ongoing Activities – HACSB will continue to implement all of the activities adopted in FY 2009. Only one activity, Local Policies for Portability, is being modified by the FY 2010 Annual Plan.

	Activity	Plan Year Adopted	Goal
1	Single Fund Budget with Full Flexibility	FY 2009	Expanding Housing Opportunities
2	Strategic Investment Policies	FY 2009	Expanding Housing Opportunities
3	Alternate Assessment Programs	FY 2009	Operational Efficiency
4	Bi-Annual Recertifications	FY 2009	Operational Efficiency
5	Local Verification Policies	FY 2009	Operational Efficiency
6	Elimination of Assets	FY 2009	Operational Efficiency
7	Controlled Program Moves	FY 2009	Operational Efficiency
8	Local Policies for Portability	FY 2009	Self-Sufficiency
9	Elimination of Earned Income Disallowance	FY 2009	Self-Sufficiency
10	Minimum Rent	FY 2009	Self-Sufficiency
11	Local Project-Based Voucher Program	FY 2009	Expanding Housing Opportunities
12	Local Payment Standards	FY 2009	Expanding Housing Opportunities

II. GENERAL OPERATING INFORMATION

HACSB administers almost 11,000 units of housing assistance throughout the County of San Bernardino consisting of Public Housing, Section 8 Housing Choice Vouchers, Shelter Plus Care Vouchers, Veterans Administration Supportive Housing (VASH) Vouchers and other local programs.

HOUSING STOCK INFORMATION

HUD Unit Summary – The chart below summarizes the Public Housing units at the beginning of the year, the changes in units anticipated during the year and the total units projected at the end of the current plan year. This chart also summarizes the authorized number of MTW Housing Choice Vouchers and authorized Project Based Vouchers at the beginning of the year; Project Based Vouchers to be added during the year; authorized Non-MTW vouchers; and, the total Housing Choice Vouchers authorized at the end of the current plan year.

HACSB HOUSING STOCK SUMMARY – HUD PROGRAMS			
Public Housing	Number of Units	Housing Choice Vouchers	Number of Vouchers
Total Public Housing Units Under ACC	1,676	MTW Tenant Based Vouchers Beginning of Year	7,328
Units Permanently Off-Line	9	Project Based Vouchers Beginning of Year	349
Total Public Housing Units Available for Occupancy	1,667	MTW Vouchers to be Project Based During the Year	71
Units to be Removed from the ACC During the Year	702	TOTAL MTW VOUCHERS	7,748
Units to be Added During the Year	0	Non MTW Vouchers	170
TOTAL ALL UNITS END OF YEAR	965	TOTAL ALL VOUCHERS	7,918

Public Housing – As noted above, HACSB plans to remove 702 units from the existing Public Housing ACC; 367 units will be demolished and the sites redeveloped as Mixed Income Housing Developments. The balance of 335 will be disposed of to an affiliate non-profit entity of the Housing Authority. The chart on the following page lists the individual sites and number of units that will be removed from the Public Housing ACC. The first four sites: 19-001, 19-002, 19-008 and 19-009 will be redeveloped as the Mixed Income communities and will contain some new public housing units, but development plans have not yet been finalized and new unit types and counts have not been determined.

PUBLIC HOUSING UNITS TO BE DEMOLISHED		
Development(s)	Type	Number of Units
CA16P019-001 (Redlands-Lugonia)	Family	50
CA16P019-002 (San Bernardino-Waterman)	Family	252
CA16P019-008 (Redlands-Lugonia)	Family	45
CA16P019-009 (Redlands-Lugonia)	Elderly	20
TOTAL UNITS TO BE DEMOLISHED		367

Justification for Demolition – The above units have been identified for removal from the Public Housing ACC through demolition because these units are no longer financially or physically viable to maintain as public housing. More detailed information will be submitted with the demolition application to the Special Applications Center (SAC) during the plan year.

PUBLIC HOUSING UNITS TO BE DISPOSED		
Development(s)	Type	Number of Units
CA16P019-017 (Scattered – AMP 6 – Bloom/O/F)	Family	28
CA16P019-020 (Scattered – AMP 6 – Montclair)	Family	8
CA16P019-021 (Scattered – AMP 6 – Ontario)	Family	2
CA16P019-022 (Scattered – AMP 8 – Victorville)	Family	9
CA16P019-023 (Scattered – AMP 6 – Fontana)	Family	9
CA16P019-024 (Scattered – AMP 5 – Redlands)	Family	8
CA16P019-025 (Scattered – AMP 9 – 29 Palms)	Family	10
CA16P019-026 (Scattered – AMP 6 – Ontario)	Family	8
CA16P019-028 (Scattered – AMP 0 –Yucca Valley)	Family	10
CA16P019-029 (Scattered – AMP 9 – 29 Palms)	Family	10
CA16P019-030 (Scattered – AMP 6 – Ontario)	Family	10
CA16P019-031 (Scattered – AMP 6, 8, 9)	Family	45
CA16P019-032 (Scattered – AMP 5, 6)	Family	63
CA16P019-034 (Scattered – AMP 8 –Hesp/Ad/AV)	Family	32

CA16P019-035 (Scattered – AMP 5, 6, 8)	Family	49
CA16P019-036 (Scattered – AMP 5, 6 – Red/O/F)	Family	19
CA16P019-042 (Scattered – AMP 5, 8-Yucaia/AV)	Family	15
TOTAL UNITS TO BE DISPOSED		335

Justification for Disposition – The above units have been identified for removal from the Public Housing ACC through disposition because they are no longer financially viable to maintain as public housing units. San Bernardino is the largest county geographically in the 48 contiguous states and the distance and small size of these properties makes them impossible to operate based on current financial resources. It is the intent of HACSB to transfer these properties to a related entity of the Authority and utilize Section 8 Project Based Assistance to support the actual operational costs of these properties. A cost analysis determining the financial feasibility under the Project Based Voucher Program will be completed during the plan year prior to application submission to the Special Applications Center (SAC).

Capital Fund Program – The Capital Fund Program Five Year Plan and Budget is included as Appendix C. The Agency will continue its capital improvements at the Medical Center Housing site (19-03, AMP 3). In addition, the Agency will be obligating and expending its Recovery Act funds in accordance with the plan.

The most significant capital expenditures planned for this plan year using Capital Funds, Recovery Act funds, Energy Performance Contract and Capital Fund Financing funds are at the Medical Center Housing site (19-03) which consists of a total of 296 units. Work at this site includes lead based paint abatement (previously encapsulated and managed in place), energy related improvements including replacement of existing windows to dual pane energy efficient windows, replacement of water main supply lines and damaged sewer laterals. New roofs will also be installed on the buildings and buildings will be painted and weatherized. Details of smaller planned capital projects are described in Appendix C.

Housing Choice Voucher Program – It is the intent of HACSB to apply for additional Housing Choice Vouchers during this plan year upon approval of demolition and/or disposition of public housing units as described. We will also increase the number of Project Based Vouchers for those properties that HACSB will redevelop and anticipate that 71 additional Project Based units will be committed to the new Vista Del Sol development. This new development is a joint venture between HACSB and its affiliate non-profit, Housing Partners I, Inc. Further information can be found on page 10.

Authority Owned (Non-HUD) Housing Stock – In addition to the HUD programs and units identified above, HACSB owns 1,132 residential housing units and 4 commercial units. Many of these units are affordable for families earning 80% or less of the Area Median Income (AMI) as a result of public funds acquired for the acquisition and/or development, such as HOME and Redevelopment Housing Set-Aside funds. The chart

below lists the residential properties and total number of units in each property in the HACSB Authority Owned (Non-HUD) Housing Portfolio. We have planned to increase our Authority Owned housing stock portfolio by 100 units in FY 2010.

HACSB HOUSING STOCK SUMMARY – AUTHORITY OWNED PORTFOLIO		
SECTION 8 PROJECT BASED ASSISTANCE PROPERTIES		
Property Name	City	Total Units
Fontana (Redwood Terrace)	Fontana	68
Robert O. Townsend	Montclair	48
Arrowhead Woods	San Bernardino	51
Grandview Towers	Twin Peaks	40
Desert Village	Victorville	46
Yucaipa Crest	Yucaipa	45
Yucaipa Terrace	Yucaipa	51
TOTAL SECTION 8 PROJECT BASED UNITS		349

HACSB HOUSING STOCK SUMMARY – AUTHORITY OWNED PORTFOLIO		
Property Name	City	Total Units
Chehalis	Apple Valley	30
Muni	Apple Valley	7
Desert View	Baker	24
9 th Street	Colton	3
Canyon Villas	Colton	46
Acacia	Fontana	28
Las Palmas	Fontana	16
A Avenue	Hesperia	4
Sunnyside	Hesperia	30
Mesa Gardens	Hesperia	29
Sequoia	Hesperia	35
Stone Creek	Loma Linda	20
Van Leuven 14/8	Loma Linda	22
Mentone (State)	Mentone	34
Crafton	Mentone	5
Kingsley Patio	Montclair	34
Bahia	Ontario	3
Frankish Building	Ontario	16
Brockton	Redlands	8
Hampton Court	Redlands	24
Lombard	Redlands	4
Stillman	Redlands	9
Merrill	Rialto	24

Kendall	San Bernardino	37
Yucca	San Bernardino	14
Kendall Park	San Bernardino	52
Andalusia	Victorville	164
Sunset Gardens	Yucaipa	39
Third Street	Yucaipa	19
Scattered Sites	Various	3
TOTAL OTHER AUTHORITY OWNED HOUSING UNITS		783
TOTAL ALL AUTHORITY OWNED HOUSING STOCK		1,132

LEASING INFORMATION

Summary – The chart below provides a utilization analysis for the Housing Choice Voucher Program. Based on available Annual Budget Authority, HACSB is not able to sustain the allocated baseline vouchers. Thus, leasing information provided further in this Plan is premised on the ABA supportable vouchers as reflected below.

HOUSING CHOICE VOUCHER UTILIZATION ANALYSIS		
Projected Year End (FY 2010)	MTW Vouchers	Annual Budget Authority
Baseline	8,244	\$61,618,448
Under Contract	7,000	\$61,618,448
Utilization Percentage	85%	100%

HACSB LEASING INFORMATION (FY 2010)					
Public Housing		Housing Choice Vouchers		Authority Owned Housing Units	
Total Units	965	Total MTW Vouchers Based on ABA	7,000	Total Units	1,132
Total Units Leased	936	Total MTW Vouchers Leased	7,000	Total Units Leased	1,042
Percent of Units Leased	97%	Percent of MTW Voucher Utilization	100%	Percent of Units Leased	92%
		Total Non MTW Vouchers	170		
		Total Non MTW Vouchers Leased	170		
		Percent of Non MTW Vouchers Leased	100%		

Anticipated Leasing Issues – As noted on the chart on page 7, Housing Choice Voucher Program utilization is expected to be 100%; however, the lease rate is expected to drop to 85%. One contributing factor is the increase in our per unit costs (from \$716.90 in October, 2008 to \$735.78 in June, 2009) and another is a shortfall in Housing Assistance Payment funding for Calendar Year 2009 in the amount of \$4.5 million. HACSB has requested for HUD to recalculate its Calendar Year 2009 HAP funding, but has not received a response to-date. We have also submitted an

application to HUD under the \$100 million set aside requesting an adjustment in our annual budget authority based on significant increases in renewal costs due to unforeseen circumstances: unemployment in San Bernardino County has risen to 12.9% far above the national average of 8.5%.

We expect to continue to honor vouchers currently under contract, but until such time that funding is adjusted to support our actual costs, we are unable to re-issue terminated vouchers during this fiscal year.

Relocation of residents from public housing units will commence during the plan year based on approval of demolition and disposition activities previously described. We intend to apply for new Housing Choice Vouchers as demolition and disposition applications are approved. Thus, relocation resources will include available public housing units, other affordable housing units available, and Housing Choice Vouchers.

WAITING LIST INFORMATION

Summary – The chart below provides a summary of the waiting list applicants by income and household type for both the Public Housing Program and the Housing Choice Voucher Program. The waiting list for the Housing Choice Voucher Program is currently closed and we do not anticipate opening the list during this plan year. Based on redevelopment strategies and funding constraints we do not anticipate selecting any new applicants from the Housing Choice Voucher Program waiting list during this plan year.

The public housing waiting list is project based and remains open at all sites. Based on redevelopment strategies for the current plan year, we anticipate closing the waiting lists for all properties designated above for demolition and/or disposition. Upon approval of the demo/dispo application, all applicants will be notified of the pending action for the property and will be advised of alternate properties where they can apply for housing.

HACSB WAITING LISTS DEMOGRAPHICS								
Family Type	Public Housing Waiting List				Housing Choice Voucher Waiting List			
	ELI (30% AMI)	VLI (50% AMI)	LI (80% AMI)	TOTAL PH	ELI (30% AMI)	VLI (50% AMI)	LI (80% AMI)	TOTAL HCV
Elderly	562	94	18	674	1,200	377	59	1,636
Disabled	219	30	0	249	277	85	24	386
All Other	6,491	1,024	296	7,811	19,681	4,948	942	25,491
TOTAL¹	7,220	1,141	314	8,675	21,122	5,317	1,019	27,458
PUBLIC HOUSING AND HOUSING CHOICE VOUCHER WAITING LIST INCOME SUMMARY								
TOTAL EXTREMELY LOW INCOME APPLICANTS								28,342
TOTAL VERY LOW INCOME APPLICANTS								6,458
TOTAL LOWER INCOME APPLICANTS								1,333
TOTAL APPLICANTS ALL PROGRAMS								36,133

¹ Applicants who were both Elderly and Disabled were excluded from the total to prevent double counting (56 in Public Housing and 55 in the Housing Choice Voucher program).

III. NON-MTW RELATED INFORMATION

Strategic Plan - Prior to receiving the MTW designation, a comprehensive 30 year strategic plan served as a guiding map for HACSB to ensure that all assisted families are working toward and achieve independence from government aid as well as ensuring the financial viability and sustainability of the Agency.

Many of the strategies articulated in the strategic plan are also initiatives and activities identified under the MTW Plan; some are outside of the MTW Plan. This plan incorporates the shared initiatives and strategies. Future MTW Plans will also include those strategies that are unique to the non-HUD activities of the Agency. For example, HACSB has multiple strategies related to Human Resources that are only tangentially related to MTW. However, a combined "Master Plan" for the Agency that will be developed in future MTW Plans will provide a clearer overall roadmap for the Agency's future and will more easily facilitate accomplishment of the established goals.

Non-MTW HUD Voucher programs – In addition to the Housing Choice Voucher Program, HACSB administers other HUD voucher programs, such as the Mainstream, Shelter + Care and HOPWA programs.

- **Mainstream** – This program is designed to provide rental assistance to persons with disabilities to enable them to rent suitable and accessible housing in the private market. Currently 91 persons are assisted under this program.
- **Shelter + Care (SPC)**- This program provides rental assistance for hard to serve homeless persons with disabilities in connection with supportive services funded from sources outside the program. Currently 36 persons are assisted under this program.
- **Housing Opportunities for People with AIDS (HOPWA)**- HACSB has partnered with Foothill Aids Project to offer rental assistance and supportive services to persons with AIDS. Currently 46 persons are assisted under this program.

Local Programs - In addition to HUD Programs, HACSB has a portfolio of other affordable housing properties and administers two local Rental Assistance programs.

- **Tenant Based Assistance (TBA)** – This program is funded by HOME funds and serves 125 families. The TBA program is modeled after the federal Housing Choice Voucher program and HACSB administers the TBA identically to the HUD HCV Program.
- **Master Leasing Program** – This program is funded by State of California Mental Health funds and serves 17 mentally ill or developmentally disabled families in a group home setting. Case management and comprehensive support services are provided for residents participating in this program.

Other Affordable Rental Housing – As discussed on page 5, HACSB owns 1,132 Authority Owned (Non-HUD) residential units. Many of those units are affordable as a result of public funds, such as HOME and Redevelopment Housing Set-Aside funds.

Affiliate Non-Profit – Housing Partners I, Inc. (HPI, I) is an affiliate non-profit of HACSB. In FY 2010, HPI, I will be completing construction on a new 71 unit senior development (Vista Del Sol) in North Redlands. Through funding received from the County of San Bernardino and the City of Redlands, approximately 75% of the development will be affordable at no more than 80% of the Area Median Income (AMI). This project, which began in 2006, is a great example of the cooperative efforts between HACSB, the City of Redlands, the County of San Bernardino and Housing Partners I, Inc. to bring an affordable housing development to fruition.

IV. LONG-TERM MTW PLAN

Mission - The Mission of the Housing Authority of the County of San Bernardino is: *“Empower all individuals and families in need, to achieve an enriched quality of life by providing housing opportunities and resources throughout San Bernardino County.”* The goals established in the MTW Agreement and the corresponding MTW activities are designed to support HACSB’s Mission.

Vision – The long term strategic vision of the Housing Authority of the County of San Bernardino is: *“Become a vital community partner and national leader in the delivery of affordable housing services.”*

Values - The HACSB strives to be a key participant in supporting and improving the community it serves. HACSB seeks to streamline its program and establish a higher standard of services to the community. To this end, the Agency has adopted the following core values that will guide it towards achieving its Mission and Vision:

- Respect
- Safety
- Integrity
- Service

Goals – Our long term MTW Plan aims to accomplish the following goals:

- **Operational Efficiency through Innovation** – *Maximizing HACSB’s economic viability and sustainability*
- **Self-Sufficiency** – *Facilitating opportunities for families and individuals to become self-sufficient and financially independent to transition from dependency on housing subsidy*
- **Expand Housing Opportunities through Repositioned Assets** – *Providing quality affordable housing opportunities in mixed-income communities with access to excellent quality of life services*

Goal 1 - Operational Efficiency through Innovation - One of the key benefits of participating in MTW is regulatory relief that allows HACSB to streamline its business processes to operate more cost-effectively and efficiently. HACSB will maximize this flexibility and implement innovative business solutions, amend policies, and redesign processes and procedures that will reduce administrative complexity, costs and staff time. MTW activities implemented under the goal of operational efficiency and innovation will improve staff morale, reduce program fraud, increase accuracy, and make the program more understandable to the community and clients. The following strategies (originally contained in HACSB’s Strategic Plan) will direct the MTW activities under this goal:

- Create programs to achieve zero fraud

- Serve as an excellent steward of resources and related programs
- Create a workplace environment that attracts and attains employees who feel they are making a difference
- Earn respect and recognition by the Community that values the work and services that HACSB provides.

The specific MTW Activities included in this FY 2010 Plan that address these strategies include:

- Local Inspection Standards
- Local Asset Management Program

Goal 2 - Promote Self-Sufficiency - Building on the success of its affordable housing programs and increased flexibility provided through the MTW demonstration, HACSB has developed strategies to increase family self-sufficiency. The following long-term strategies (originally contained in HACSB's 30 year Strategic Plan) will help improve the quality of lives of HACSB assisted families:

- Transform client mindset from entitlement to empowerment
- Execute networking, partnership and delivery systems to enhance personal and family development
- Expand and diversify funding sources for resident services

The specific MTW activities in this MTW Plan that address these strategies include a modification to a previous activity:

- Local policies for portability

Goal 3 - Expand Housing Opportunities through Repositioned Assets - Creating quality housing choice options for low-income families is a top priority of HACSB. Through its Initial Plan the Agency has already begun repositioning assets in order to better serve the community. HACSB is implementing the following long-term strategies (in its 30 year Strategic Plan) to expand housing opportunities:

- Have an increasingly diverse number of funding sources
- Build, buy and rehab housing stock
- Maintain excellent stewardship of resources and related programs

While there are no specific activities that address this goal in FY 2010, HACSB will be moving forward on the implementation of Local Payment Standards which are expected to expand housing opportunities for low-income families.

V. PROPOSED MTW ACTIVITIES

General – The activities described below are conceptual plans based on current information and preliminary impact analysis. Various scenarios of design and implementation of these activities will be undertaken that will result in more detailed impact analysis for program participants as well as for the financial sustainability of the agency. HACSB also envisions developing more detailed and refined benchmark measurements as the details of each activity are developed and implemented. These finalized benchmarks will be included in the MTW Annual Report. Detailed implementation plans will be developed for each activity; data collection and analysis will be ongoing; and implementation plans will be revised as needed.

GOAL 1: OPERATIONAL EFFICIENCY AND INNOVATION

The following activities have been identified as additional initiatives that HACSB desires to implement in FY 2010 under this goal.

Activity 13: Local Inspection Standards

- A. Description** - HACSB will develop and implement local inspection standards for the Housing Choice Voucher program that will increase the Agency's operational efficiency as well as provide better housing options to low-income families. The Agency will develop a property rating system and will determine frequency of inspections based on the rating assigned to the specific property. Some properties may be inspected bi-annually while some properties will continue to be inspected annually. Properties that do not meet the minimal rating criteria will not be accepted on the program.
- B. Statutory Objective** – This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures.
- C. Anticipated Impacts** – This activity will enable the Agency to develop local inspection standards that meet the need of the community, allow for flexibility, produce a reduction in administrative burden for both the Agency and landlords, and will provide incentives to HACSB to increase quality housing choice options for low-income families.
- D. Baselines, proposed benchmarks, and metrics to assess outcomes** – There will be at least three baselines for this Activity. One baseline will be the number of inspections conducted on an annual basis (initial, annual and special) for the year prior to implementation. The metric for this baseline will be the number of inspections by type. The benchmark will be the reduction in inspections on an annual basis. The expected outcome is an overall reduction in the number of inspections conducted by HACSB.

The second baseline will be the average staff time to conduct each type of inspection based on a time study that will be conducted prior to implementation of this activity. The metric for this baseline will be the average staff time per inspection

by type. The benchmark will be a reduction in the staff time to complete an inspection and the expected outcome is an overall reduction in the amount of time it takes to process an inspection by type.

The third baseline will be the number of properties by category using private sector real estate standards (A, B, C, D and F properties) upon implementation. The metric will be the number of properties in each category type. The benchmark will be the increase in the number of type A and B properties and elimination of type D and F properties that receive subsidy under the HACSB Housing Choice Voucher program. The outcome will be better quality housing units for program participants.

Baseline	Metric	Benchmark	Outcome
# of inspections conducted prior year by type	# of inspections conducted annually by type	Reduction in # of inspections conducted by type	Reduced inspections required
Average staff time to complete inspection by type prior year	Average staff time to complete inspections by type	Reduction in staff time to complete inspections	Reduced staff time to complete inspections
Number of properties in each rating category prior year	Number of properties in each category	Increase in A and B properties; elimination of D and F properties	Improved quality of housing units for participants

E. Data Collection and Protocols – A baseline report will be developed to identify the total number of inspections by type over the past 12 months prior to implementation. A time study will be conducted to determine the average time to conduct an inspection by type. A property rating system will be developed with the specific criteria that establish the ratings to be used and each current property will be assigned a rating at the time of the next inspection.

F. Authorization Cited – HACSB is authorized to undertake this initiative through Attachment C (D)(5) which waives certain provisions of Sections 8(o)(8) of the 1937 Act and 24 CFR982 Subpart I.

Activity 14: Local Asset Management Program

A. Description - HACSB will develop a local asset management program based on private sector property management principles. This activity will initially be implemented at two asset management projects (AMP's) that are programmed to remain as traditional public housing in HASCB's portfolio. Detailed reports will be developed to capture all financial, operational and social performance indicators of the property. Working with the local chapter of the Institute of Real Estate Management (IREM) or other comparable entity, similar private sector properties will be identified. An agreement will be established with the local property management company managing the identified properties to collect the same financial, operational and social data. Ongoing analysis will be completed to track and identify operational similarities and differences. Using this data, HACSB will develop realistic property performance expectations based on the actual performance of the local real estate market and the local Asset Management Program will be finalized.

B. Statutory Objective – This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures.

C. Anticipated Impacts – This activity will enable the Agency to develop and implement an Asset Management Program that is more reflective of the actual real estate market in San Bernardino County. Comparing the public housing properties with the actual real estate market practices in San Bernardino will enable us to make more informed decisions about long term maintainability of the properties in the public housing portfolio.

D. Baselines, proposed benchmarks, and metrics to assess outcomes – The baseline will be the results of the initial financial, operational and social data collected for the initial property where this activity will be implemented. The metrics will be results of the financial, operational and social data collected for the private sector property used for comparison. The benchmark will be variance in the data points between the public housing property and the private sector property. The outcome will be a local Asset Management Program that establishes realistic property performance goals based on conditions of the local real estate market.

Baseline	Metric	Benchmark	Outcome
Financial, operational and social data to be collected at initial PH property.	Financial, operational and social data to be collected from private sector property.	Variance in financial, operational and social data between PH and private properties	Realistic property performance goals in the local market.

E. Data Collection and Protocols – A detailed report of current financial, operational and social data will be developed. The same data will be collected for private sector properties. Both data sets will be analyzed to identify similarities and variances. Using this data, the local Asset Management performance expectations will be established including fees for service; required rent levels (and operating subsidy) to cover actual operating costs; and, replacement reserves to support future capital needs.

F. Authorization Cited – HACSB is authorized to undertake this initiative through the First Amendment to the Moving to Work Agreement which deleted Section II.F. of the Amended and Restated Agreement and replaced it with 6. Local Asset Management Program within MTW.

GOAL 2: PROMOTE FAMILY SELF-SUFFICIENCY

The following activities have been identified as additional initiatives that HACSB desires to implement in FY 2010 under this goal.

Activity 15: Pilot Work Requirement

A. Description – HACSB will implement a pilot work requirement for residents of the Medical Center Asset Management Project (AMP). The primary property in this AMP: Medical Center Apartments has been identified as a property that will remain as traditional public housing in the HACSB portfolio and a capital investment of \$7 million will be made at this property over the next two years.

Improving the quality of life for residents is not limited to an improved physical environment but also through assuring that residents work towards individual self-improvement. As such, HACSB will be implementing a pilot work requirement in this community to encourage all work-able family members to seek and maintain employment, training, volunteer work or other levels of engagement that improve their social and economic well-being and prepare them for self-sufficiency.

HACSB has analyzed “best practices” and “lessons learned” of other Moving to Work Agencies that have implemented work requirements. The experiences of these agencies as well as the local experiences of the State of California Welfare to Work Program will guide how a mandatory work requirement will be implemented.

During FY 2010 HACSB will begin planning the pilot work requirement including determination of the following:

- Definition of “work”
- Number of hours required by each adult household member
- Phase in of work requirement policy
- Hardship exemptions
- Community partners to provide supportive services, job training and employment opportunities
- Partnership with the school system to ensure enrollment of school-age children
- Quantitative and Qualitative data analysis to measure success and outcomes



Typical Public Housing Unit at the Medical Center Apartments

**Shared Common
Space and
Two Units
at the
Medical Center
Apartments**



- B. Relation to Statutory Objectives** - This activity relates to the statutory objective to provide incentives to families to achieve self-sufficiency.
- C. Anticipated Impact** – The anticipated impact of this activity is increased earned income for residents of the Medical Center AMP, decreased school truancy, increased training program, technical school and college enrollment, strengthened relationships with critical community partners, reduced crime and improved community perception of the area, and increased rental income for HACSB.
- D. Baselines, proposed benchmarks, and metrics to assess outcomes**– The baseline is the number of work-able individuals residing at the Medical Center AMP that are currently engaged in a work related activity. The metrics will be number of individuals residing at this AMP that engage in work-related activities. The benchmark will be an increase of 50% in the number of work-able individuals that become engaged in work related activities in year 1 and an additional 50% in year 2. The outcome will be improved social conditions at the property.

A second baseline is the current total monthly tenant rent charged at the Medical Center AMP. The metrics for this baseline will be the increase in the amount of tenant rent charged. The benchmark will be an increase in tenant rent charged of 2% per year. The outcome will be increased tenant rent revenue to support the operating costs of the property.

Baseline	Metric	Benchmark	Outcome
# of current work-able residents engaged in a work related activity	Individuals engaging in work related activity	Increase of 50% per year for 2 years of individuals engaging in work related activities	Improved social conditions at the property.
Total monthly rent charged	Increase in the amount of tenant rent charged	Increase of 2% per year of tenant rent charged	Increased revenue to support property operations.

E. Data Collection and Protocols - A detailed report will be developed for all key demographic data for the residents of this AMP. The chart below identifies many of the key elements that will be included in this report to assist in the development of the work requirements. HACSB will work with community stakeholders, our resident advisory board, the school system, the workforce investment board and other organizations in our community to assure that ample opportunities are available for residents to meet the work related requirements.

Medical Center AMP Baseline Family Characteristics	
Total number of households	328
Total number of household members	1167
Total members over 62 and older	43
Disabled	
Total members 17 and under	625
Total families on TANF	131
Highest annual adjusted income	\$84,572
Number of zero income families	13
Average annual adjusted income	\$13,459
Number of families with income over California Minimum Wage (\$8/hr)	96
Number of adult members with earned income	
Average family size	3.6 household members
Largest family size	10
Number of single person families	38
Number of families on site-based waiting list	
Average number of evictions per year	

F. Authorizations - HACSB is authorized to undertake this initiative through Attachment C(3)(b) which waives certain provisions of Section 16(b) and 8(o)(4) of the 1937 Act and 24 CFR 5.603, 5.609, 5.611, 5.628, and 982.201.

VI. ONGOING MTW ACTIVITIES

In the Initial Plan (2009) submitted to HUD, HACSB proposed and adopted 12 Moving to Work Activities. These activities will continue as described in the FY 2008-2009 Plan with the exception of Local Policies for Portability. This activity will be modified as described further below.

Activity 1: Single Fund Budget with Full Flexibility

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

a. Description - HACSB will combine resources (Public Housing Operating Funds; Public Housing Capital Fund and Housing Choice Voucher funding) under a single fund block grant.

b. Statutory Objective – This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures.

c. Anticipated Impacts – This activity will enable the Authority to allocate federal resources to support the local initiatives described under this plan and provide flexibility to redistribute resources among federal programs based on actual needs.

d. Baselines, proposed benchmarks, and metrics to assess outcomes –

Baseline	Metric	Benchmark	Outcome
Per unit funds by program	Allocation of funds	Decrease of per unit cost at the end of the MTW Agreement	Programs funded based on need

e. Data Collection and Protocols – Financial data from fiscal year 2009 will be used to establish the baseline and an annual financial report and analysis will be developed to measure actual annual costs and percent of total funding of each program.

B. Status Update - HACSB has begun initial analysis of fungibility needs of each program based on the agreed upon MTW activities to determine how the block grant funds will be allocated for the upcoming fiscal year assuring that all programs are sufficiently funded to continue successful administration and operations. HACSB is also working to modify its current financial tracking and reporting systems to support the MTW reporting requirements under the FDS and VMS systems.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 2: Strategic Investment Policies

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

- a. **Description** - HACSB will adopt investment policies consistent with California Government Code to the extent such policies are in compliance with applicable OMB circulars and other federal laws. HACSB shall invest only in securities authorized under state law that will allow the flexibility to invest productively, efficiently and securely.
- b. **Statutory Objective** – This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures.
- c. **Anticipated Impacts** – This activity will enable the Authority to achieve a portfolio that is safer, more liquid and contains a competitive yield. Under California investment policies, HACSB will be able to invest in stronger investment instruments with lower transaction costs, thus increasing overall investment returns.
- d. **Baselines, proposed benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Average interest rate earned on HUD investments during FY 2009	Interest rate earned on investments	.01% increase per year.	Increased overall investment returns

- e. **Data Collection and Protocols** – Investment data from 2009 will be used to establish the baseline. An investment report will be developed that charts the earnings on State eligible investments against the earnings on HUD eligible investments each year. This report will determine if the benchmark has been achieved using this new portfolio investment strategy.

B. Status Update - HACSB has begun analysis of investment options available under California state law and their historical financial performance. Additional analysis will continue and projections will be made of current funds available for both short term and long term investments and recommendations provided as to what additional investment opportunities with positive performance would be utilized by HACSB for future investment. A schedule will be developed for moving investments to new opportunities as appropriate.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 3: Alternate Assessment Programs

Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

- a. **Description** – HACSB will opt out of the HUD SEMAP and PHAS systems and will establish its own program assessment system designed to measure the quality and timeliness of work performed under the MTW Agreement.
- b. **Statutory Objective** – This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures.
- c. **Anticipated Impacts** – This activity will enable the Authority to establish an organizational performance assessment system that measures the outcomes of program performance based on the local goals and objectives established by HACSB.
- d. **Baselines, proposed benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Key program indicators to be established by 9/30/09	Performance level of each indicator established	Performance score of 90% or greater for all program indicators	Overall increased program performance relative to local goals.

- e. **Data Collection and Protocols** – Program indicators to be measured will be established by September 30, 2009 (FYE). Data will be collected to confirm current status of each performance indicator as of this date and an initial rating will be assigned. Reports will be developed to track the performance indicators on an ongoing basis and a rating will be assigned at the end of each fiscal year. Detailed action plans will be implemented for any indicator that decreases from the previous year.

B. Current Status – HACSB is working to develop additional performance metrics for Public Housing operations and Housing Choice Voucher administration beyond the mandatory metrics required under the MTW Agreement. HACSB is also participating with the wider MTW community to assess whether a universal alternate measurement system is an option to be considered for future implementation.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 4: Bi-Annual Recertifications

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

- a. **Description** - HACSB will conduct re-certifications every two years for elderly and disabled households that have no other adult members and for which there is no earned income for both the Public Housing and Housing Choice Voucher programs.
- b. **Statutory Objectives** - This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures
- c. **Anticipated Impacts** - This activity is projected to generate significant staff time reduction and will reduce reporting burdens for the affected families.
- d. **Baselines, benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Total number of staff hours to complete annual recertification	Hours to complete recertification (estimate of 1.5)	staff hours reduced by 1,816 in HCV and 263 in PH	Total number of staff hours reduced
Actual number of families required to complete recertification packet annually	Number of families completing recertification packets annually	Families completing annual recertification packets will decrease by 2,000	Reduced reporting burden for families as less families complete recertification packets.

- e. **Data Collection and Protocols** - A time study will be conducted to confirm the estimated time for completion of annual re-certifications for the affected families under this activity. The actual number of families converted to bi-annual re-certifications will be tracked and a report will be provided that confirms the exact amount of reduced staff time.

B. Current Status - The Agency is currently developing implementation plans for this activity with an estimated implementation date of early Fall 2009. HACSB is also developing plans to communicate with all affected participants to inform them of this particular policy change as well as other MTW initiatives. Finally, HACSB is preparing to conduct the final data analysis, including a time study, to determine the baselines as outlined in the FY 2009 Initial Plan prior to implementation.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 5: Local Verification Policies

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

- a. **Description** - HACSB will implement local verification policies for both the Public Housing and Housing Choice Voucher programs. Verification for new admissions will be limited to documents provided by the applicant; no third party verification will be required. Verification for annual and/or interim re-certifications will continue to be based on the HUD EIV reports and HACSB will establish a local schedule of values that will govern when third party verification will be required. All verifications will remain valid for a period of six months from the date received.
- b. **Statutory Objectives** - This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures .
- c. **Anticipated Impact** - This activity is projected to generate a significant reduction in staff time and reduce other operating costs such as postage.
- d. **Baselines, benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Average minutes of staff time to process third party verification	Minutes per verification (estimate of 15)	Number of staff hours reduced	Total number of staff hours reduced (estimate of 1,939 HCV and 428 PH)
Current annual cost of postage for third party verifications	Cost of postage per third party verification	Reduction in postage costs	Total amount spent on postage is reduced (estimate of \$8,300/year)

- e. **Data Collection and Protocols** - A time study will be conducted to confirm the estimated time for completion of third party verification under this activity. The actual number of third party verifications that would have been issued without this activity will be tracked and a report will be provided that confirms the reduced staff time and the reduced postage costs.

B. Current Status - The Agency is currently developing implementation plans for this activity with an estimated implementation date of early Fall 2009. HACSB is also developing plans to communicate with all affected participants to inform them of this particular policy change as well as other MTW initiatives. Finally, HACSB is preparing to conduct the final data analysis, including a time study, to determine the baselines as outlined in the FY 2009 Initial Plan prior to implementation.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 6: Elimination of Assets

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

- a. **Description** – HACSB will eliminate assets in the calculation of tenant rent. Information related to assets will no longer be collected and income from assets will not be considered as part of the rent calculation formula. The elimination of assets from the rent calculation will be applicable in both the Public Housing and Housing Choice Voucher programs.
- b. **Statutory Objectives** – This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures.
- c. **Anticipated Impact** - The anticipated impact of this activity is to generate staff time reductions. A possible unanticipated impact could be a reduction in rental revenue in the Public Housing program and an increase in Housing Assistance Payments in the Housing Choice Voucher program.
- d. **Baselines, benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Average minutes of staff time to collect and calculate asset income	Minutes per household	Number of staff hours reduced	Total number of staff hours reduced (874 for HCV and 184 for PH)

- e. **Data Collection and Protocols** - A time study will be conducted to confirm the average completion time of annual re-certifications without assets to estimate time saved from elimination of assets from the recertification process. A financial analysis will be completed to determine the reduction in tenant rent in the public housing program and the increased HAP payments in the HCV program. These costs will be compared with the savings from staff time reductions to determine if the anticipated savings have been realized.

B. Current Status - The Agency is currently developing implementation plans for this activity with an estimated implementation date of early Fall 2009. HACSB is also developing plans to communicate with all affected participants to inform them of this particular policy change as well as other MTW initiatives. Finally, HACSB is preparing to conduct the final data analysis, including a time study, to determine the baselines as outlined in the FY 2009 Initial Plan prior to implementation.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 7: Controlled Program Moves

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

- a. **Description** – HACSB will limit voluntary program moves for Housing Choice Voucher participants to once every two years, only at the time of annual re-certification and upon verification from their current landlord that they are a tenant in good standing.
- b. **Statutory Objectives** - This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures.
- c. **Anticipated Impact** –The anticipated impact of this activity is a reduction in the number of families that voluntarily move each year and the corresponding reduction in staff time to process program moves every year.
- d. **Baselines, benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Percent of total program moves voluntarily each year	Percent of families that voluntarily move each year	No more than 4% of total program voluntarily moves each year and only at annual recertification	Families voluntarily move only at annual recertification and only bi-annually.
Number of staff hours annually spent to process program moves	# of hours to process a program move	50% reduction in total annual staff hours processing voluntary program moves	Reduced staff time to process program moves

- e. **Data Collection and Protocols** - A time study will be conducted to confirm the average time to complete the entire move process. The number of families approved for voluntarily moves will be tracked and a report developed to monitor the percent of families moving and the voucher success rate of these families. Analysis will be conducted to determine the resulting reduction in costs.

B. Current Status - The Agency is currently developing implementation plans for this activity with an estimated implementation date of early Fall 2009. HACSB is also developing plans to communicate with all affected participants to inform them of this particular policy change as well as other MTW initiatives. Finally, HACSB is preparing to conduct the final data analysis, including a time study, to determine the baselines as outlined in the FY 2009 Initial Plan prior to implementation.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 8: Local Policies for Portability

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB's Initial Plan.

- a. **Description** - As HACSB exercises its MTW flexibility its policies will begin to differ significantly from other Public Housing Authorities, as a result, HACSB will apply all MTW requirements to inbound and outbound portability. In order to achieve operational efficiency, HACSB must be able to apply its policies and procedures to all participants in its jurisdiction. HCV participants porting into San Bernardino County or porting out to another jurisdiction will all be required to comply with HACSB's MTW policies and requirements. HACSB will enforce the MTW requirements on outbound ports that are administered by the Receiving PHA through verification of compliance at the time of annual re-certifications. Families wanting to port into HACSB's jurisdiction will be advised of MTW requirements at the time of initial contact with HACSB and will only be permitted to port in if they are in compliance with all MTW requirements.
- b. **Relation to Statutory Objectives** – This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures. HACSB intends to use its MTW flexibility to implement innovative, streamlined approaches to providing housing assistance. HACSB understands that portability is critical to increasing housing choice options; however, operational efficiency would be compromised if the Agency had two sets of policies—one for portable families and another for families from the waiting list. In order to achieve the statutory objectives of MTW, the HACSB needs to be able to have one Housing Choice Voucher program with one set of policies and procedures.
- c. **Anticipated Impact** – The anticipated impact of this activity is to generate staff time reductions and reduce the accounts payable from initial PHAs. A possible unanticipated impact could be a decrease in housing choice for families who are interested in moving to San Bernardino County, but do not qualify because they are not compliant with the MTW requirements. HACSB will work with its largest inbound port agencies to educate them on any upcoming policy changes to ensure that the portability processes remain smooth and seamless for families.
- d. **Baselines, benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Average staff time spent to process portability.	Hours to process portability	20% reduction in port out and 50% reduction in port in Number of in-bounds not accepted and number of out-bounds not approved	Reduction in staff time to process portability

Accounts receivable due to untimely payments from Receiving PHA's	Percent of monthly HAP receivable from portability	Reduction of 5% of accounts each year.	Increase in cash available to make timely HAP payments.
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e. **Data Collection and Protocols** –A time study will be conducted to confirm the average time to complete processing of both an in-bound and out-bound portability family. The number of families porting in and porting out will be tracked to determine the percent of reduction and the corresponding savings in staff time. Portability data will be analyzed to determine the total number of families requesting to port in and total number requesting to port out. The percent of families not approved will be analyzed. A financial report will be developed to monitor the impact on the HCV accounts payable amount.

B. Current Status - The Agency is currently developing implementation plans for this activity with an estimated implementation date of early Fall 2009. HACSB is also developing plans to communicate with all affected participants to inform them of this particular policy change as well as other MTW initiatives. In addition, HACSB has begun communicating with surrounding PHAs to assist them in understanding the Agency's MTW status and how this may impact their clients. Staff also have begun communicating to any interested ports the Agency's MTW status and long-term plan to consider changes to the rent structure as well as possible work-requirements. Finally, HACSB is preparing to conduct the final data analysis, including a time study, to determine the baselines as outlined in the FY 2009 Initial Plan prior to implementation.

C. Proposed Modifications – The Agency will modify this activity for FY 2010. In this Annual Plan, HACSB has proposed to implement a pilot work requirement for one AMP in the Public Housing program. HACSB will also implement a pilot work requirement for the Housing Choice Voucher program as well.

HACSB will require that all work-able families desiring to port into HACSB must provide verification that they have employment in the jurisdiction of HACSB prior to execution of a Housing Assistance Payment contract. Over the course of the remainder of FY 2009 and during FY 2010 HACSB will analyze the implications of this policy, work with surrounding PHAs to determine the best implementation plan and develop clear guidelines and hardship exemptions to ensure that housing options for families are not unintentional reduced as a result of this policy.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 9: Elimination of Earned Income Disregard

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB’s Initial Plan.

- a. **Description** - HACSB will eliminate the HUD Mandatory Earned Income Disallowance (MEID) from the calculation of total tenant payment and replace it with the rent reform activities authorized under the MTW Agreement and exercised in MTW Plans.
- b. **Relation to Statutory Objectives** - This activity addresses the MTW statutory objective to give incentives to families with children whose head of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining employment and becoming economically self-sufficient.
- c. **Anticipated Impact** – The anticipated impact of this activity is to remove a false sense of financial security or perceived entitlement and guide families through the real world experience of budgeting and managing available financial resources, and prioritizing expenditures for basic needs including housing costs. An unanticipated impact will be an increase in rental revenue in the Public Housing program and reduced Housing Assistance Payments in the HCV program and staff time reductions.
- d. **Baselines, benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Outcome
Families receiving EID with earned income	Families that retain earned income	50% of families will retain earned income upon expiration of EID	Families working towards self-sufficiency
Average staff time to manage EID	Reduction in staff time to manage EID	Reduction of 1200 hours of staff time over 4 years.	Reduced staff time to manage EID and more time to manage MTW initiatives

e. **Data Collection and Protocols** –The current EID households will be tracked to determine if they retain earned income after elimination of program. A time study will be conducted to confirm the average time to manage the Earned Income Disallowance over the life of the exemption and hours saved in staff time will be calculated accordingly.

B. Current Status - The Agency is currently developing implementation plans for this activity with an estimated implementation date of early Fall 2009 and eventual total phase out by the Fall 2011. HACSB is also developing plans to communicate with all affected participants to inform them of this particular policy change as well as other MTW initiatives. Finally, HACSB is preparing to conduct the final data analysis, including a time study, to determine the baselines as outlined in the FY 2009 Initial Plan prior to implementation.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 10: Minimum Rent

A. Activity Plan Year – This activity was initially included in Plan Year 2009, HACSB's Initial Plan.

a. Description - HACSB will increase the minimum rent from \$50.00 to \$125.00 per month for all households in both the Public Housing and the Housing Choice Voucher Programs.

b. Relation to Statutory Objectives – This activity addresses the MTW statutory objective to give incentives to families with children whose head of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining employment and becoming economically self-sufficient.

c. Anticipated Impact – The anticipated impact of this activity is to decrease the number of zero income households and increase the number of households who will seek employment. An additional impact will be increased rental revenue in the Public Housing program and reduced Housing Assistance Payments in the HCV program.

d. Baselines, benchmarks, and metrics to assess outcomes –

Baseline	Metric	Benchmark	Outcome
8% of HCV families and 6.3% of PH households with TTP <\$125.00	Percent of households at minimum rent	< or = 1% of all households pay less than minimum rent.	Reduction in the number of households paying minimum rent
Current earned income from households with TTP<\$125.00	Aggregate amount of earned income from households with TTP<\$125	Increase earned income of these households by 1% per year.	Increased earned income of households
Limited rental revenue and additional HAP expense from households with TTP<\$125.00	Increase in rental revenue and decrease in HAP expense	Increase PH rental revenue from minimum rent households by 50% and HCV households by 6%	Additional revenue available to meet other local goals and assist more families

e. Data Collection and Protocols – A report will be developed to track the total number and percent of minimum rent families in each program each year. A financial report will be developed to measure the increased rental revenue and the decrease in average HAP for the minimum rent families.

B. Current Status - The Agency is currently developing implementation plans for this activity with an estimated implementation date of early Fall 2009. HACSB is also developing plans to communicate with all affected participants to inform them of this particular policy change as well as other MTW initiatives.

In the interim, while formal communication plans are being developed, staff are working with participants, including the Resident Advisory Board, to determine the best ways to implement these policies. Additionally, upon annual recertification staff are verbally communicating with participants to inform them of the upcoming change in the minimum rent. Finally, HACSB is preparing to conduct the final data analysis, including a time study, to determine the baselines as outlined in the FY 2009 Initial Plan prior to implementation.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 11: Local Project-Based Voucher Program

A. Activity Plan Year – This activity was described in Plan Year 2009, HACSB’s Initial Plan.

a. Description - HACSB will implement a local Project-Based Voucher (PBV) program to increase the availability of quality housing units. The local PBV Program will include the following components:

1. Project-based assistance at properties owned by the Authority or an affiliate of the Authority that are not public housing.
2. Establishment of a reasonable competitive process for project-basing leased housing assistance at units in which the Authority or a related affiliate has no ownership interest that meet existing Housing Quality Standards or any standards developed by the Agency pursuant to this MTW Agreement and approved by the Secretary, and that are owned by non-profit, and for-profit housing entities.
3. Adoption of alternate standards for determining the location of existing, newly constructed or substantially rehabilitated housing to receive subsidy in compliance with the requirements outlined in Attachment C of our MTW Agreement.

b. Relation to Statutory Objectives – This activity addresses the MTW statutory objective to increase housing choices for low-income families.

c. Anticipated Impact – The anticipated impact of this activity is an increase in the total affordable housing portfolio owned directly or indirectly by

HACSB and to increase the number of tenant based voucher families that voluntarily move to project based units because of improved quality of housing that does not exist in the existing rental housing inventory in San Bernardino County.

d. Baselines, benchmarks, and metrics to assess outcomes –

Baseline	Metric	Benchmark	Outcome
Number of non-HUD affordable housing units	Non-HUD affordable housing units and percent of new units occupied by tenant based voucher holders.	Increase in the number of Non-HUD affordable housing units (target at 100 per year) and 5% percent of new units occupied by tenant based voucher holders	An increase in the number of Non-HUD affordable housing units and more housing choice for tenant based households.

e. Data Collection and Protocol – A report will be developed to track the new housing units developed each year and the number of new units under PBV contracts. An initial occupancy report for each project will be used to determine the tenant based voucher holders that choose to relocate to these newly developed units.

B. Current Status – No work has been completed on this activity as of the writing of this new plan for 2010.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

Activity 12: Local Payment Standards

A. Activity Plan Year – This activity was described in Plan Year 2009, HACSB's Initial Plan.

a. Description - HACSB will implement Local Payment Standards that accurately reflect the varying rental submarkets that exist across San Bernardino County. A third party market study will be conducted to define the submarkets and the corresponding market rent.

b. Relation to Statutory Objectives – This activity addresses the MTW statutory objective to increase housing choices for low-income families.

c. Anticipated Impact – The anticipated impact of this activity is increased housing opportunities for participants, improved quality of units for families to choose and more accurate determination of rent to owner based on true market data.

d. Baselines, Metric and Benchmarks –

Baseline	Metric	Benchmark	Outcome
Current percent of families residing in impacted areas	Percent of families that move to less impacted areas; number of first time landlords in the program; and, number of Class B or greater multi-family apartment complexes accepting vouchers for the first time.	1% of program families move to less impacted areas per year; 25 first time landlords each year; and, 1 Class B or greater apartment complex each year.	Actual % of families that move to less impacted areas per year, actual number of first time landlords each year, and number of new Class B or greater apartment complexes added

e. Data Collection and Protocols – An independent extensive market study will be conducted to determine the local real estate submarkets and the payment standards applicable to each submarket. A report will be developed to track the movement of participants within each submarket and to track first time landlords.

B. Current Status - The Agency is currently researching local real estate market firms to see what data may currently be available on the County of San Bernardino rental submarkets and corresponding fair market rents. After evaluating what data is currently available, HACSB intends to procure an outside party to assist the Agency in determining appropriate payment standards for the Housing Choice Voucher program.

C. Proposed Modifications - There are no proposed modifications to this activity in FY 2010.

D. Outside Evaluators - HACSB will not be using outside evaluators to monitor and/or evaluate this activity.

VII. SOURCES AND USES OF FUNDS

A. Planned Sources and Uses of HUD Funds

1. **Planned Sources and Uses of MTW Funds-** The chart below summarizes the HACSB Consolidated MTW Budget for the Fiscal Year 2010 (October 1, 2009- September 30, 2010). This chart lists all planned revenue and expenditures for all funding sources that comprise the MTW Block Grant sources including Section 9 Operating Funds; Section 9 Capital Funds; Section 8 Housing Assistance Payments; and Section 8 Administrative Fees.

CONSOLIDATED SOURCES AND USES OF MTW FUNDS (FISCAL YEAR 2010)		
REVENUE (SOURCES)		
Housing Choice Voucher Program HAP	\$	61,618,448
Housing Choice Voucher Program Admin Fees	\$	6,498,032
Public Housing Operating Fund	\$	5,270,159
Public Housing Capital Fund	\$	8,024,458
Rental Income	\$	5,380,227
Miscellaneous Income	\$	588,146
Investment Income	\$	523,342
TOTAL REVENUE	\$	87,902,812
EXPENSE (USES)		
Administration and General Expense	\$	14,450,451
Utilities	\$	1,344,234
Operations and Maintenance	\$	6,841,388
Housing Assistance Payments	\$	61,618,448
Development and Capital Projects	\$	3,648,291
TOTAL EXPENSE	\$	87,902,812
OPERATING INCOME/(LOSS)	\$	0
Reserve Drawdown/(Buildup)	\$	0
NET INCOME/LOSS	\$	0

2. **Planned Sources and Uses of Non MTW Funds-** The chart below summarizes the HACSB Consolidated Non MTW Budget for the Fiscal Year 2010 (October 1, 2009- September 30, 2010). This chart lists all planned revenue and expenditures for other funds that are not eligible MTW Block Grant funds (including state and local funds). The budgeted net income is anticipated to be deposited to current operating reserves.

CONSOLIDATED SOURCES AND USES OF NON-MTW FUNDS (FISCAL YEAR 2010)		
REVENUE (SOURCES)		
Grants	\$	3,861,699
Rental Income	\$	8,329,954
Administrative Fees	\$	301,423
Investment Income	\$	825,786
Miscellaneous Income	\$	1,108,368
TOTAL REVENUE	\$	14,427,230
EXPENSE (USES)		
Administration and General Expense	\$	2,563,767
Utilities	\$	608,712
Operations and Maintenance	\$	4,487,020
Extraordinary Maintenance	\$	169,370
Housing Assistance Payments	\$	3,279,756
TOTAL EXPENSE	\$	11,108,625
OPERATING INCOME/(LOSS)	\$	3,318,605
Reserve Buildup	\$	3,318,605
NET INCOME/LOSS	\$	0

B. Planned Sources and Uses of State/Local Funds- The chart below summarizes the HACSB State and Local Funds Budget for the Fiscal Year 2010 (October 1, 2009- September 30, 2010). This chart lists all planned revenue and expenditures for all funding sources that comprise State and Local operating activities. The budgeted net income is anticipated to be deposited to current operating reserves.

SOURCES AND USES OF STATE AND LOCAL FUNDS (FISCAL YEAR 2010)		
REVENUE (SOURCES)		
Rental Income	\$	550,070
Investment Income	\$	66
Miscellaneous Income	\$	11,288
TOTAL REVENUE	\$	561,424
EXPENSE (USES)		
Administration and General Expense	\$	175,311
Utilities	\$	69,972
Operations and Maintenance	\$	300,934
TOTAL EXPENSE	\$	546,217
OPERATING INCOME/LOSS	\$	15,207
Reserve Buildup	\$	(15,207)
NET INCOME/LOSS	\$	0

C. Planned Sources and Uses of Central Office Cost Center- The chart below summarizes the HACSB Central Office Cost Center Budget for the Fiscal Year 2010 (October 1, 2009- September 30, 2010). This chart lists all planned revenue and expenditures for all central office cost center operations. The budgeted net loss is expected to be transferred out of other operating funds.

SOURCES AND USES OF CENTRAL OFFICE COST CENTER (FISCAL YEAR 2010)			
REVENUE (SOURCES)			
Management Fees	\$	4,421,092	
Miscellaneous Income	\$	628,481	
TOTAL REVENUE			\$ 5,049,573
EXPENSE (USES)			
Administration and General Expense	\$	4,691,375	
Utilities	\$	38,674	
Operations and Maintenance	\$	856,622	
TOTAL EXPENSE			\$ 5,586,671
Operating Transfers In/(Out)			\$ 537,098
NET INCOME/(LOSS)			\$ 0

D. Cost Allocation or Fee for Service Methodology

HACSB is utilizing the HUD prescribed Fee for Service approach with no deviations for Fiscal Year 2010.

E. Single Fund Flexibility

HACSB plans on using its single fund budget flexibility in FY 2010.

VIII ADMINISTRATIVE

- A. Resolution of the Board Of Commissioners** – Attached in the appendices is the Resolution of the Board of Commissioners adopting this Annual MTW Plan along with the Certificate of Compliance prescribed by HUD in Exhibit B of the MTW Agreement.

- B. Planned Ongoing Agency Evaluations of the Demonstration** – As of the submission of this plan, HACSB does not have any planned or ongoing Agency-directed evaluations of the MTW Demonstration.

Attached on following page.

RESOLUTION NO. 2244

**A RESOLUTION BY THE BOARD OF COMMISSIONERS OF THE HOUSING
AUTHORITY OF THE COUNTY OF SAN BERNARDINO ADOPTING THE
FISCAL YEAR 2009-2010 MOVING TO WORK ANNUAL PLAN**

WHEREAS, the Housing Authority of the County of San Bernardino entered into a Moving-to-Work (MTW) Agreement with the U.S. Department of Housing and Urban Development (HUD) on March 14, 2008, and

WHEREAS, on September 25, 2008, HUD approved the Housing Authority's Initial MTW Plan outlining its long term vision and goals; and

WHEREAS, the Housing Authority of the County of San Bernardino desires to implement the activities in its Fiscal Year 2009-2010 MTW Annual Plan that will increase operational efficiency and innovation; promote family self-sufficiency; reposition critical assets and expand housing opportunities;

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of the County of San Bernardino does hereby adopt the Fiscal Year 2009-2010 Moving to Work Annual Plan.

Adopted: July 8, 2009

C E R T I F I C A T E

I, Susan L. Benner, Secretary of the Housing Authority of the County of San Bernardino hereby certify that the attached Resolution No. 2244 was adopted by the Board of Commissioners by vote of the members present as the same appears in the Official Minutes of said Authority at a regular meeting of July 8, 2009

July 9, 2009
Date

Susan L. Benner
Susan L. Benner
Secretary

SEAL

Annual Moving to Work Plan PHA Certifications of Compliance

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

PHA Certifications of Compliance with Regulations: Board Resolution to Accompany the Annual Moving to Work Plan

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the PHA fiscal year beginning 09-10, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

1. The PHA made the proposed Plan and all information relevant to the public hearing available for public inspection at least 30 days before the hearing, published a notice that a hearing would be held and conducted a hearing to discuss the Plan and invited public comment.
2. The PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
3. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identify any impediments to fair housing choice within those programs, address those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and maintain records reflecting these analyses and actions.
4. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
5. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
6. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
7. The PHA has submitted with the Plan a certification with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
8. The PHA has submitted with the Plan a certification with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.
9. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
10. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
11. The PHA will provide HUD or the responsible entity any documentation that the Department needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58.
12. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
13. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
14. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
15. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments.).
16. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
17. All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its Plan and will continue to be made available at least at the primary business office of the PHA.

PHA Name

PHA Number/HA Code

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official Mario Saucedo	Title Chairman
Signature <i>x Mario Saucedo</i>	Date 7-8-09

Certification for a Drug-Free Workplace

U.S. Department of Housing and Urban Development

Applicant Name

Housing Authority of the County of San Bernardino

Program/Activity Receiving Federal Grant Funding

Moving to Work

Acting on behalf of the above named Applicant as its Authorized Official, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the sites listed below:

I certify that the above named Applicant will or will continue to provide a drug-free workplace by:

a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the Applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition.

b. Establishing an on-going drug-free awareness program to inform employees ---

(1) The dangers of drug abuse in the workplace;

(2) The Applicant's policy of maintaining a drug-free workplace;

(3) Any available drug counseling, rehabilitation, and employee assistance programs; and

(4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

c. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph a.;

d. Notifying the employee in the statement required by paragraph a. that, as a condition of employment under the grant, the employee will ---

(1) Abide by the terms of the statement; and

(2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

e. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph d.(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;

f. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph d.(2), with respect to any employee who is so convicted ---

(1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or

(2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs a. thru f.

2. **Sites for Work Performance.** The Applicant shall list (on separate pages) the site(s) for the performance of work done in connection with the HUD funding of the program/activity shown above: Place of Performance shall include the street address, city, county, State, and zip code. Identify each sheet with the Applicant name and address and the program/activity receiving grant funding.)

Check here if there are workplaces on file that are not identified on the attached sheets.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official

Susan Benner

Title

Executive Director

Signature

X *Susan Benner*

Date

7/9/09

form HUD-50070 (3/98)

ref: Handbook 7447.4, 7475.10, 7485.1 & .3

APPENDIX B: PUBLIC PROCESS

The following steps were taken by HACSB to ensure a thorough public process in the development and adoption of the FY 2009-2010 MTW Annual Plan:

- Monday, May 25: Public notice published in the San Bernardino Sun announcing the public hearing on Tuesday, June 23rd; text and Affidavit of Publication included as part of Appendix B
- Plan posted on HACSB's website and made available at HACSB offices
- Friday, June 5: Plan discussed and comments were solicited at the Resident Advisory Board meeting; meeting minutes included as part of Appendix B
- Tuesday, June 23: Public Hearing held; minutes included as part of Appendix B
- Wednesday, July 8: Approval by Board of Commissioners – Resolution included in Appendix A

SAN BERNARDINO COUNTY SUN

This space for filing stamp only

4030 N GEORGIA BLVD, SAN BERNARDINO, CA 92407
Telephone (909) 889-9666 / Fax (909) 885-1253

MARIA G. RAZO
HOUSING AUTHORITY/SAN BERNARDINO
715 E BRIER DR
SAN BERNARDINO, CA - 92408-2841

SBS#: 1602060

PROOF OF PUBLICATION

(2015.5 C.C.P.)

State of California)
County of SAN BERNARDINO) ss

Notice Type: HRGSB - NOTICE OF HEARING-SB

Ad Description: NOTICE OF PUBLIC HEARING-MTW PLAN FY 09-10

I am a citizen of the United States and a resident of the State of California; I am over the age of eighteen years, and not a party to or interested in the above entitled matter. I am the principal clerk of the printer and publisher of the SAN BERNARDINO COUNTY SUN, a newspaper published in the English language in the city of SAN BERNARDINO, county of SAN BERNARDINO, and adjudged a newspaper of general circulation as defined by the laws of the State of California by the Superior Court of the County of SAN BERNARDINO, State of California, under date 06/20/1952, Case No. 73084. That the notice, of which the annexed is a printed copy, has been published in each regular and entire issue of said newspaper and not in any supplement thereof on the following dates, to-wit:

05/25/2009

Executed on: 05/25/2009
At Los Angeles, California

I certify (or declare) under penalty of perjury that the foregoing is true and correct.

Maria Razo



Signature

NOTICE OF PUBLIC HEARING
On March 14, 2008, the U.S. Department of Housing and Urban Development (HUD) executed a ten-year Moving to Work (MTW) Agreement with the Housing Authority of the County of San Bernardino (HACSB) and on September 25, 2008, HUD approved HACSB's first Annual MTW plan. As an MTW agency, HACSB is provided with more flexibility and authorization to develop policies that are outside the limitations of certain HUD regulations in order to more successfully achieve its mission and program goals, and to enhance its ability to serve the needs of low-income people and communities in San Bernardino County. In continuing to develop its MTW program and address community and client needs, HACSB has prepared its Fiscal Year (FY) 2009-2010 MTW Plan. The FY 2009-2010 MTW Plan will be available to the public for review at the following location from Monday, May 25, 2009 through Tuesday, June 23, 2009:

**Housing Authority of the
County of San Bernardino
715 E. Brier Drive
San Bernardino, CA 92408**

The Fiscal Year 2009-2010 MTW Plan will also be available on HACSB's website at www.hacsb.com and any HACSB satellite office.

Notice is hereby given that the Housing Authority of the County of San Bernardino will conduct a public hearing on June 23, 2009 at 10:00 a.m. at 715 E. Brier Drive, San Bernardino, CA 92408. If a citizen wishes to challenge the nature of the above action(s) in court he/she may be limited to raising only those issues he/she or someone else raised at the public hearing described in this notice, or in written correspondence delivered Monday through Friday to the Secretary's Office located at 715 E. Brier Drive, San Bernardino, CA 92408 prior to the hearing.

In accordance with the Rehabilitation Act of 1973, the Housing Authority will make reasonable efforts to accommodate persons with disabilities. Please call (909) 890-0644 at least three days in advance if you require special accommodations. To receive copies of this notice in Spanish, please call (909) 890-0644. 5/25/09

SBS-1602060#

**MINUTES OF A REGULAR MEETING
OF THE RESIDENT ADVISORY BOARD COUNCIL
June 5, 2009**

Members of the Resident Advisory Board Council (RAB) met in a regular meeting at 715 E. Brier Drive, San Bernardino, California at 10:00 a.m. on June 5, 2009

Called to order: Roberto Talavera 10:00 a.m.

Upon roll call, the following were **P-Present, A-Absent, L-Late, or E-Excused**

MEMBERS

Johanna Carlos - **P**
Yvonne Downing - **P**
Yvonne Ellerbe - **P**
Valinda Lowe - **P**
Sylvia Miller - **P**
Roberto Talavera - **P**
Rhonda Scott – **P**
Loretta Guillen - **P**
Jessie Munoz - **P**

Coordinators

Janice Simmons - **P**
Robert Scott – **P**
Estella Nunez – **P**
George Hogan – **P**
Darlene McIntosh – **P**

Agenda Items:

Item #1- There was no absences.

Item #2- May 8, 2009 Minutes. Miller made the motion to approve the minutes for May 8, 2009, Downing second.

Item #3- May 22 & 28, 2009 Minutes. Miller made the motion to approve minutes for May 22 & 28, 2009 with corrections to the meeting held on the 28th address change from 425 to 402 Alder, second by Jessie.

Item #4- Angle Food: Pastor Don conducted an overview with regards to Angle Food Ministries providing food assistance to families across America.

Item #5- Senior/Annual Inspection Awareness: Yvonne Downing opened up discussion on providing annual inspection workshops for assisting residents with cleaning units/house keeping classes. Discussion on the average cost of unit damage. Miller made motion to plan for house keeping class or workshop for the near future, Jessie second.

Item #6- Ethic and Conduct/Bylaws - To be placed on agenda for July 17, 2009 meeting.

Item #7-Appoint Ad hoc Committee – Ad hoc Committee was appointed with meeting to be held on June 19, 2009 at 11:00 am following the strategic breakfast at the Waterman Gardens Community Room.

Item #8 –Business Cards Distribution-Yvonne Ellerbe reports that the business cards were not complete however, stated that she would mail them out to everyone by the weekend of June 6, 2009. Miller made motion for Yvonne Ellerbe to put in writing a letter for reimbursement for the cost of the materials for the business cards.

Item #9 – FY 09-10 MTW Plan-Maria Razo introduced herself as the Deputy Executive Director for the Office of Business Administration. She conducted a full overview introduction regarding the Moving to Work Demonstration, gave background information and discussed the plan effective October 1, 2009. Discussion included: General Operating Information, Non MTW Information, Long Term MTW Plan, Proposed MTW Activities, Ongoing MTW Activities, Sources and Uses of Funds. Maria explained each of the three new activities included in the plan. The Advisory Council participants expressed positive and strong support for all of the new and ongoing activities and were in agreement with the proposal of the MTW Annual Plan.

Item # 10-RSC Update Monthly Report:

Estella- Briefly discussed Crossing Jordan/Club Live.

Darlene- Discussed Cert Training, Top Flight Bridges Program available to Colton, High School exit exams, Option House workshop regarding sexual assaults and more set for June 17, 2009 at 10:00 am.

Robert- discussed WIB- city urban youth has their grant and they are planning to expand program. Pride Program Summer Fair event set for August 8, 2009. Art Show for Senior Awareness.

George- discussed that there is very few vendors wanting to come out and participate with resources to the Barstow site. Barstow held a fair with 20 vendors, however, very low resident support.

Janice- discussed that on May 28th she helped 33 youths with the summer youth employment process. Youth Specialist from EDD came out and discussed the importance of being a team leader and the school drop out rate as well as young parents gave hope to a lot of the children in the Redlands community. Cert Trainings set for June 9 and July 8, 2009. Senior Expo set for June 10, 2009. Janice also shared several other resources to the RSC's and RAC's.

Item # 11 - RAC Members Monthly Reports:

Robert- discussed Summer Youth and Cert Training.

Rhonda- discussed Back to School Event and donations of pen and pencils.

Johanna- has not had monthly meeting as of yet for June.

Yvonne D. - discussed Senior Programs and Cert Training

Sylvia – discussed helping youths in the community with the application process for the summer youth employment program and the outreach event for club live to be held on June 19, 2009 at 3:00 pm.

Yvonne E. – discussed Cert Training and she recruited individual, outreach to churches for donation of food.

Valinda – discussed teen employment.

Item # 11- Future RAC Meetings - July 17, 2009 and an Ad hoc Committee meeting will be held on June 19, 2009 at the Waterman Gardens Community Room.

Item # 12 Concerns/questions

The meeting was motioned to be **adjourned** by Ms. Miller 2nd by Ms. Downing at 12:25p.m.

Respectfully submitted,

Sylvia Miller

**HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO
MOVING-TO-WORK ANNUAL PLAN PUBLIC HEARING
HELD ON JUNE 23, 2009**

The Housing Authority of the County of San Bernardino (Housing Authority), California held a public hearing for the 2009-2010 Moving to Work (MTW) Annual Plan at the Housing Authority's Administration Office at 715 East Brier Drive, San Bernardino, CA 92408 on June 23, 2009.

Present: Alison Crawford, Director, Administrative Services
 Marcia Waggoner, Deputy Executive Director, Office of Housing Programs

I. Purpose of the Public Hearing

The purpose of the hearing was to provide interested parties with an opportunity to present questions and/or comments regarding the Housing Authority of the County of San Bernardino's Fiscal Year 2009-2010 Moving to Work Annual Plan before it is submitted to the U.S. Department of Housing and Urban Development (HUD) for final approval.

II. Opening Remarks

The purpose of the MTW demonstration is to give participating public housing authorities (Agencies) the flexibility to design and test innovative approaches to providing and administering housing assistance that accomplished the three primary objectives: To achieve programmatic efficiency and reduce costs; to promote self-sufficiency among assisted families; and to increase housing choices for low-income households.

Each Housing Authority participating in this demonstration, such as the Housing Authority of the County of San Bernardino, is required to submit an Annual Plan that describes its goals and objectives for the upcoming year. Our plan was made available for public viewing on May 25, 2009. The plan was advertised in the San Bernardino Sun (county newspaper), on the Housing Authority's website, and were copies were available at all Housing Authority offices.

III. Call for Public Comments

The public hearing convened at 10:00 a.m. with Alison Crawford, Director, Administrative Services, presiding. Ms. Crawford explained that the purpose of this hearing was to provide interested parties with an opportunity to present questions and/or comments regarding the FY 2009-2010 Moving to Work Annual Plan before it is submitted to the U.S. Department of Housing and Urban Development (HUD) for final approval.

IV. Comments

There were no members of the public nor representatives of any other agencies in attendance, and the hearing was adjourned at 10:15 a.m.

MTW Annual Plan Public Hearing (June 23, 2009)

At 10:58 a.m. Mischa Jackson-Kennedy, Attorney with Inland Counties Legal Services entered the Administrative office inquiring about the public hearing. Ms. Jackson was informed that the public hearing was over. She provided the front staff with her business card and left the building. Ms. Crawford called Ms. Jackson and left a voice message stating that the public hearing was closed; however, Ms. Jackson could submit her questions and/or concerns in writing and the Housing Authority would respond.

APPENDIX C: CAPITAL FUND- FIVE YEAR PLAN & BUDGET

Housing Authority of the County of San Bernardino
Capital Fund Program- Five Year Plan & Budget (2010-2014)

AMP 202	Development	City	Units	Budget	Plan Year	Activities
	Cal 19-18 - N. Berkeley St.	San Bernardino	6	50,000	2010	Landscape/Fencing/504
	Cal 19-19 - W. Evans St.	San Bernardino	24	50,000	2010	Landscape/Fencing/504/Exterior Stairway
	Cal 19-32 - Genevieve	San Bernardino	8	50,000	2010	Landscape/Fencing/504/Exterior Stairway
	Cal 19-32 - Genevieve	San Bernardino	8	143,750	2011	R/R Roof
	Cal 19-18 - 2nd St.	San Bernardino	4	23,500	2011	Site Improvement
	Cal 19-18 - 4th Street	San Bernardino	6	150,000	2012	R/R Roof
	Cal 19-14 - Lugo Ave.	San Bernardino	8	75,000	2012	Site Improvement
	Cal 19-18 N. Berkeley St.	San Bernardino	6	75,000	2012	Site Improvement
	Waterman Gardens	San Bernardino	246	406,115	2012	Redevelopment Activity
	Cal 19-18 - King Street	San Bernardino	2	50,000	2013	Site Improvement
	Cal 19-31 - N. "E" Street	San Bernardino	24	75,000	2013	Site Improvement
	Cal 19-34 - Lynnwood	San Bernardino	15	50,000	2013	Site Improvement
	Waterman Gardens	San Bernardino	246	406,115	2013	Redevelopment Activity
	Cal 19-14 - Lugo Ave.	San Bernardino	8	150,000	2014	R/R Roof and Repair Subfloors
	Cal 19-19 - W. Evans St.	San Bernardino	24	100,000	2014	Repair Subfloors
	Cal 19-31 - N. "E" Street	San Bernardino	24	100,000	2014	Repair Subfloors
	Cal 19-18 - 4th Street	San Bernardino	6	75,000	2014	Site Improvement
	Waterman Gardens	San Bernardino	246	406,115	2014	Redevelopment Activity
	Total- AMP 202			2,435,595		

AMP 203	Development	City	Units	Budget	Plan Year	Activities
	Medical Center	San Bernardino	296	200,000	2010	Exterior Improvements/Electrical/Plumbing
	Medical Center	San Bernardino		12,500	2010	Com Center/Office Upgrades
	Cal 19-18 - W. 8th St.	San Bernardino	6	25,000	2011	Repave Driveway
	Medical Center	San Bernardino		20,000	2011	Com Center/Office Upgrades
	Medical Center	San Bernardino	296	140,700	2011	Exterior Improvements/Electrical/Plumbing
	Cal 19-18 - N. Davidson	San Bernardino	6	150,000	2012	R/R Roof/Repair subfloors
	Cal 19-18 - 11th Street	San Bernardino	2	75,000	2012	R/R Roof/Repair subfloors
	Cal 19-18 - Turrill	San Bernardino	2	75,000	2012	R/R Roof/Repair subfloors
	Medical Center	San Bernardino	296	200,000	2012	Electrical/Plumbing Improvements
	Cal 19-18 - W. 8th St.	San Bernardino	6	55,000	2012	Site Improvement
	Cal 19-18 - W. 7th St.	San Bernardino	6	55,000	2012	Site Improvement
	Cal 19-18 - W. 8th St.	San Bernardino	6	125,000	2013	R/R Roof/Repair subfloors
	Cal 19-18 - W. 7th St.	San Bernardino	6	125,000	2013	R/R Roof/Repair subfloors
	Medical Center	San Bernardino	296	175,000	2013	Electrical/Plumbing Improvements
	Cal 19-18 - "J" Street	San Bernardino	2	65,000	2014	R/R Roofs
	Cal 19-18 - "J" Street	San Bernardino	2	50,000	2014	Site Improvement
	Medical Center	San Bernardino	296	200,000	2014	Electrical/Plumbing Improvements
	Total- AMP 203			1,748,200		

**Housing Authority of the County of San Bernardino
Capital Fund Program- Five Year Plan & Budget (2010-2014)**

AMP 205	Development	City	Units	Budget	Plan Year	Activities
	Redlands - Lugonia Site	Redlands	113	406,115	2010	Redevelopment Activities
	Cal 19-05 - Redlands	Redlands	75	200,000	2010	Electrical/Plumbing/Exterior Improvements
	Cal 19-05 - Redlands	Redlands		250,000	2010	Street Improvements/R/R Waterlines
	Cal 19-32 - E. 9th St.	Highland	12	150,000	2011	R/R Roof
	Cal 19-05 - Redlands	Redlands		12,500	2011	Com Center/Office Upgrades
	Redlands - Lugonia Site	Redlands	113	406,115	2011	Redevelopment Activities
	Cal 19-05 - Redlands	Redlands		25,000	2012	Com Center/Office Upgrades
	Cal 19-05 - Redlands	Redlands	75	75,000	2013	R/R Waterlines
	Cal 19-05 - Redlands	Redlands	75	137,500	2013	Electrical/Plumbing/Interior Improvements
	Cal 19-05 - Redlands	Redlands		25,000	2014	Com Center/Office Upgrades

Total- AMP 205

1,687,230

AMP 206	Development	City	Units	Budget	Plan Year	Activities
	Cal 19-06 - Chino	Chino	50	200,000	2010	Electrical/Plumbing/Exterior Improvements
	Cal 19-04 - Colton	Colton	85	12,500	2010	Com Center/Office Upgrades
	Cal 19-04 - Colton	Colton	85	200,000	2011	Electrical/Plumbing/Exterior Improvements
	Cal 19-06 - Chino	Chino	50	43,750	2011	R/R waterlines
	Cal 19-06 - Chino	Chino	50	40,000	2012	R/R waterlines
	Cal 19-06 - Chino	Chino		15,000	2013	Com Center/Office Upgrades
	Cal 19-06 - Chino	Chino	50	143,398	2013	Electrical/Plumbing/Exterior Improvements
	Cal 19-04 - Colton	Colton	85	153,398	2014	Electrical/Plumbing/Interior Improvements
	Cal 19-04 - Colton	Colton	85	125,000	2014	R/R waterlines

Total- AMP 206

933,046

AMP 207	Development	City	Units	Budget	Plan Year	Activities
	Cal 19-07 - Barstow	Barstow	60	93,398	2010	Electrical/Plumbing/Exterior Improvements
	Cal 19-07 - Barstow	Barstow	60	175,000	2011	Electrical/Plumbing/Exterior Improvements
	Cal 19-13 - Barstow	Barstow	88	171,698	2011	Electrical/Plumbing/Exterior Improvements
	Cal 19-07 - Barstow	Barstow		12,500	2011	Com Center/Office Upgrades
	Cal 19-07 - Barstow	Barstow	60	72,000	2012	Electrical/Plumbing/Exterior Improvements
	Cal 19-13 - Barstow	Barstow	88	71,398	2012	Electrical/Plumbing/Exterior Improvements
	Cal 19-07 - Barstow	Barstow		10,000	2013	Com Center/Office Upgrades
	Cal 19-07 - Barstow	Barstow	60	137,500	2013	Electrical/Plumbing/Exterior Improvements
	Cal 19-13 - Barstow	Barstow	88	75,000	2014	Electrical/Plumbing/Exterior Improvements

Total- AMP 207

818,494

Housing Authority of the County of San Bernardino
 Capital Fund Program- Five Year Plan & Budget (2010-2014)

AMP 208	City	Units	Budget	Plan Year	Activities
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no planned activities at this time

Total - AMP 208
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AMP 209	City	Units	Budget	Plan Year	Activities
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no planned activities at this time

Total - AMP 209
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AGENCY WIDE	Development Account	Budget	Plan Year	Activities
Operations		500,000	2010-2014	Operations
Management Improvements		700,000	2010-2014	
Administration		400,000	2010-2014	
Fees & Costs		200,000	2010-2014	Architects, Inspection Costs
Audit		10,000	2010-2014	Audit Program
Non-Dwelling Equipment		10,000	2010-2014	Misc equipment
Relocation Costs		25,000	2010-2014	
Debt Service Pledge		642,716	2010-2014	CFFP

Total - Agency Wide
 X5
12,438,580

Grand Total - All AMP's
20,061,145

**Housing Authority of the County of San Bernardino
Capital Fund Program- ARRA Funds Budget**

AMP 202	Development	City	Units	Budget	Plan Year	Activities
	Cal 19-02 - Waterman Gardens	San Bernardino	246	40,000	2009	Redevelopment Activities

Total- AMP 202 40,000

AMP 203	Development	City	Units	Budget	Plan Year	Activities
	Cal 19-03 - Medical Center	San Bernardino		25,000	2009	A&E Costs

Total- AMP 203 25,000

AMP 205	Development	City	Units	Budget	Plan Year	Activities
	Cal 19-05 - Redlands	Redlands	75	650,000	2009	LBP Removal/Exterior Improvements
	Cal 19-05 - Redlands	Redlands	75	400,000	2009	R/R Windows
	Cal 19-05 - Redlands	Redlands	75	420,000	2009	R/R Roofs
	Redlands - Lugonia Site	Redlands	113	217,689	2009	Redevelopment Activities

Total- AMP 205 1,687,689

AMP 206	Development	City	Units	Budget	Plan Year	Activities
	Cal 19-04 - Colton	Colton	85	750,000	2009	LBP Removal/Exterior Improvements
	Cal 19-04 - Colton	Colton	85	500,000	2009	R/R Windows
	Cal 19-04 - Colton	Colton	85	476,000	2009	R/R Roofs
	Cal 19-04 - Colton	Colton		35,000	2009	Com Center/Office Upgrades
	Cal 19-06 - Chino	Chino	50	400,000	2009	LBP Removal/Exterior Improvements
	Cal 19-06 - Chino	Chino	50	300,000	2009	R/R Windows
	Cal 19-06 - Chino	Chino	50	280,000	2009	R/R Roofs
	Cal 19-06 - Chino	Chino		35,000	2009	Com Center/Office Upgrades
	Cal 19-10 - Colton	Colton		25,000	2009	A&E Costs

Total- AMP 206 2,801,000

Housing Authority of the County of San Bernardino
Capital Fund Program- ARRA Funds Budget

AMP 207	Development	City	Units	Budget	Plan Year	Activities
	no planned activities at this AMP					

Total- AMP 207 _____

AMP 208	Development	City	Units	Budget	Plan Year	Activities
	no planned activities at this time					

Total- AMP 208 _____

AMP 209	Development	City	Units	Budget	Plan Year	Activities
	no planned activities at this time					

Total- AMP 209 _____

AGENCY WIDE	Development Account	City	Units	Budget	Plan Year	Activities
	Management Improvements			40,000	2009	IT Software
	Administration			400,000	2009	
	A&E Fees & Costs			50,000	2009	

Total - Agency Wide 490,000

Grand Total- All AMP's 5,043,689

APPENDIX D: SUMMARY CHART OF MTW ACTIVITIES

The chart below provides a summary listing of the MTW Activities that are proposed by HACSB for FY 2010 as well as the previous year's Activities.

	Activity	Plan Year Adopted	Goal
1	Single Fund Budget with Full Flexibility	FY 2009	Expanding Housing Opportunities
2	Strategic Investment Policies	FY 2009	Expanding Housing Opportunities
3	Alternate Assessment Programs	FY 2009	Operational Efficiency
4	Bi-Annual Recertifications	FY 2009	Operational Efficiency
5	Local Verification Policies	FY 2009	Operational Efficiency
6	Elimination of Assets	FY 2009	Operational Efficiency
7	Controlled Program Moves	FY 2009	Operational Efficiency
8	Local Policies for Portability	FY 2009	Self-Sufficiency
9	Elimination of Earned Income Disallowance	FY 2009	Self-Sufficiency
10	Minimum Rent	FY 2009	Self-Sufficiency
11	Local Project-Based Voucher Program	FY 2009	Expanding Housing Opportunities
12	Local Payment Standards	FY 2009	Expanding Housing Opportunities
13	Local Inspection Standards	FY 2010	Operational Efficiency
14	Local Asset Management Program	FY 2010	Operational Efficiency
15	Pilot Work Requirement	FY 2010	Self-Sufficiency