



# Moving to Work

**Fiscal Year 2010-2011 ANNUAL PLAN**

Building Communities, Changing Lives...



**Initial Submission: July 15, 2010**

**Final Submission: September 30, 2010**

**Housing Authority of the County of San Bernardino**

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## TABLE OF CONTENTS

<b>SECTION</b>	<b>TITLE</b>	<b>PAGE</b>
I	Introduction	1
II	General Operating Information	4
III	Non-MTW Information	10
IV	Long Term MTW Plan	13
V	Proposed MTW Activities	16
VI	Ongoing MTW Activities	26
VII	Sources and Uses of Funds	49
VIII	Administrative	53

### APPENDICES

A	Board Resolution Adopting Plan	54
B	Public Process (including Public Hearing Minutes)	60
C	Capital Fund-Five Year Plan and Budget	64
D	Summary Chart of MTW Activities	73
E	Impact Analysis	74
F	Sample Communications to Residents/Participants, Landlords and Community (MTW Fact Sheets)	79

## TABLE OF CONTENTS

<b>SECTION</b>	<b>TITLE</b>	<b>PAGE</b>
I	Introduction	1
II	General Operating Information	4
III	Non-MTW Information	10
IV	Long Term MTW Plan	13
V	Proposed MTW Activities	16
VI	Ongoing MTW Activities	26
VII	Sources and Uses of Funds	49
VIII	Administrative	53

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A	Board Resolution Adopting Plan	54
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E	Impact Analysis	74
F	Sample Communications to Residents/Participants, Landlords and Community (MTW Fact Sheets)	79

## I. INTRODUCTION

**Background** – The Housing Authority of the County of San Bernardino (HACSB) is currently in its second year of participation in the U.S. Department of Housing and Urban Development’s (HUD) Moving to Work (MTW) Demonstration Program in Fiscal Year (FY) 2010 (October 1, 2009 to September 30, 2010). An initial MTW plan and a comprehensive revised Initial Plan were submitted and approved by HUD for the period covering FY 2009. Our FY 2010 MTW Annual Plan was approved by HUD on September 30, 2009. Shortly thereafter we submitted and HUD approved an Amendment to the FY 2010 MTW Annual Plan to incorporate the proposed HOPE VI Revitalization Plan for the Lugonia Avenue public housing site in Redlands, California. We have also submitted a Second Amendment to the FY 2010 plan which initiated Activity 16: Operating Subsidy for Vista del Sol. The Non-Traditional/Local Use of Funds flexibility has allowed us to provide affordable housing to 53 seniors. We are committed to achieving significant results throughout the term of our Agreement in order to meet the three statutory objectives, our long term vision and the affordable housing needs of the residents of the County of San Bernardino.

**Overview of Agency’s Goals and Objectives** - As HACSB implements its local MTW Program, it has been guided by its long-term MTW goals as well as its strategic plan, mission, vision and values. Immediately prior to our designation as an MTW Agency, we embarked on a 30 year strategic planning process. The flexibility granted by our MTW designation coupled with our 30 year strategic plan will help us realize our goals and objectives.

Through the MTW program and our strategic plan, HACSB aims to accomplish the following through our established goals and objectives

- **Goal 1 - *Operational efficiency through innovation*** – *Maximizing HACSB’s economic viability and sustainability through the following objectives:*
  - Ensure excellent and efficient stewardship of resources and programs
  - Maintain a workplace environment that attracts and retains capable employees who feel they are making a difference
  - Develop a communication program that effectively disseminates information inside and outside the Agency
  - Provide world class customer service
- **Goal 2 - *Self-Sufficiency*** – *Facilitating opportunities for families and individuals to become self-sufficient and financially independent to transition from dependency on housing subsidy through the following objectives:*
  - Ensure that each client has, is committed to, and is implementing a feasible and inspiring (to them) plan for economic independence or life improvement.
    - Transform client mindset from entitlement to empowerment
    - Partner with external organizations to support clients in acquiring life skills, education and training
    - Assist clients in transitioning to Home Ownership/Market housing
- **Goal 3 - *Expand housing opportunities through repositioned assets*** – *Providing quality affordable housing opportunities in mixed-income communities with access to excellent quality of life through the following objectives:*

- Have an increasingly diverse number of funding sources to provide the programs and services described in the strategic plan
- Improve HACSB's existing housing stock
- Increase building stock to meet the low income requirements of San Bernardino County

**New Activities** - HACSB is proposing the following 4 new activities in this FY 2011 MTW Annual Plan to help us achieve our goals and meet the statutory objectives of our MTW Agreement.

<b>PROPOSED ACTIVITIES</b>		
<b>ACTIVITY</b>	<b>DESCRIPTION</b>	<b>STATUTORY OBJECTIVE</b>
<b>Activity 17</b>	Local Income Inclusion	Self-Sufficiency
<b>Activity 18</b>	Property Management Innovation	Operational Efficiency
<b>Activity 19</b>	Pilot Local FSS program	Self-Sufficiency
<b>Activity 20</b>	Term Limits	Self-Sufficiency

**Ongoing Activities** – HACSB will continue to implement the following activities that were approved in our FY 2009 and FY 2010 MTW Annual Plans.

<b>ONGOING ACTIVITIES</b>			
<b>ACTIVITY</b>	<b>DESCRIPTION</b>	<b>STATUTORY OBJECTIVE</b>	<b>PLAN YEAR</b>
<b>Activity 1</b>	Single Fund Budget	Operational Efficiency	FY 2009
<b>Activity 2</b>	Strategic Investment Policies	Operational Efficiency	FY 2009
<b>Activity 4</b>	Biennial Recertifications	Operational Efficiency	FY 2009
<b>Activity 5</b>	Local Verification Policies	Operational Efficiency	FY 2009
<b>Activity 6</b>	Elimination of Assets	Operational Efficiency	FY 2009
<b>Activity 7</b>	Controlled Program Moves	Operational Efficiency	FY 2009
<b>Activity 8</b>	Local Policies for Portability	Self-Sufficiency	FY 2009
<b>Activity 9</b>	Elimination of Earned Income Disallowance	Self-Sufficiency	FY 2009
<b>Activity 10</b>	Minimum Rent	Self-Sufficiency	FY 2009
<b>Activity 11</b>	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009
<b>Activity 12</b>	Local Payment Standards	Expanding Housing Opportunities	FY 2009
<b>Activity 13</b>	Local Inspection Standards	Operational Efficiency	FY 2010
<b>Activity 14</b>	Local Asset Management Program	Operational Efficiency	FY 2010
<b>Activity 15</b>	Pilot Work Requirement	Self-Sufficiency	FY 2010
<b>Activity 16</b>	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010

**Postponed Activity** - HACSB will work with other MTW agencies to develop an alternate assessment program to replace the current SEMAP and PHAS systems.

<b>POSTPONED ACTIVITY</b>			
<b>ACTIVITY</b>	<b>DESCRIPTION</b>	<b>OBJECTIVE</b>	<b>PLAN YEAR</b>
<b>Activity 3</b>	Alternate Assessment Program	Operational Efficiency	FY 2009



**A youth workshop held at the Waterman Gardens Public Housing Community (San Bernardino, CA)**

## II. GENERAL OPERATING INFORMATION

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

### HOUSING STOCK INFORMATION

**Public Housing** – The chart below summarizes the Public Housing units at the beginning of the fiscal year, the changes anticipated during the year and the total units projected at the end of the current plan year. HACSB began FY 2010 with 1,670 housing units under ACC. However, 9 of these units previously had been permanently converted to non dwelling units for resident service purposes such as head start centers, child care, and education centers. In addition, two units were sold to current residents under the Section 32 Homeownership Program to low income families. We also plan to dispose of 335 units by 9/30/2010: therefore the expected unit count available for occupancy by 10/1/2010 is 1,324. No additional units are expected to be added during FY 2011. The planned unit changes in FY 2011 are detailed in the Demolition Plans section.

Public Housing	Number of Units
Total Public Housing Units under ACC - Beginning of Year	1,333
Units Permanently offline	9
Total Public Housing Units Available for Occupancy	1,324
Units to be removed from ACC during the Year	115
Units to be added during the year	0
<b>TOTAL ALL UNITS EXPECTED END OF YEAR</b>	<b>1,209</b>

**Demolition Plans** - In the current fiscal year, we applied for a HOPE VI grant for the demolition of 115 units in Redlands, CA, commonly referred to as the Lugonia Avenue Public Housing site; however, we were not successful in obtaining an award. We plan to submit a HOPE VI and/or Choice Neighborhoods application in the upcoming fiscal year. If approved, the units will be demolished and the site will be redeveloped as a Mixed Use/Income Community consisting of 228 units (an increase from the original unit count of 115). The Lugonia Avenue public housing redevelopment that is the subject of this specific application and request for funding is PIC number CA16P019-001, 008 and 009, which is part of AMP CA019000150. The units below 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.

PUBLIC HOUSING UNITS TO BE DEMOLISHED		
Development(s)	Type	Number of Units
CA16P019-001 (Redlands-Lugonia)	Family	50
CA16P019-008 (Redlands-Lugonia)	Family	45
CA16P019-009 (Redlands-Lugonia)	Elderly	20
<b>TOTAL UNITS TO BE DEMOLISHED</b>		<b>115</b>

Preliminary plans are underway for the demolition and reconstruction of the Waterman Gardens development (site 019-002). It is anticipated that the existing 256 Public Housing units will be replaced one-for-one and a substantial number of additional affordable units will be added in the form of a Mixed Use/Mixed Income community.

**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), Colton (19-04), Chino (19-06) (both AMP 6), and Redlands (19-05, AMP 5). In addition, the Agency will commence the master planning process for the comprehensive redevelopment of the Waterman Gardens site in San Bernardino (19-02, AMP 2).

The most significant capital expenditures planned for this year using Capital Funds, American Recovery and Reinvestment Act (ARRA) funds, Energy Performance Contract and Capital Fund Financing funds are spread over the 4 sites listed above (Medical Center, Colton, Chino, and Redlands) which include 545 housing units. Work continues to include lead based paint abatement, 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. Competitive ARRA funding awarded to HACSB will also provide for the installation of solar photovoltaic panels as a pilot project at the Medical Center site. Details of smaller planned capital projects are described in Appendix C.



Before and an after (artist rendition) pictures at Medical Center

**MTW Vouchers** - The charts below summarize the baseline number of MTW Vouchers, Project Based Vouchers and authorized number of Non MTW Vouchers at the beginning of the year along with changes expected during FY 2011.

<b>MTW Vouchers</b>	<b>Number of Vouchers</b>
MTW Tenant Based Vouchers -Beginning of Year (non PBV)	7,373
MTW Project Based Vouchers -Beginning of Year (PBV)	710
Expected Additions/Deletions during plan year (Tenant Based or Project Based)	0
<b>TOTAL AUTHORIZED VOUCHERS EXPECTED AT THE BEGINNING OF YEAR</b>	<b>8,083</b>

<b>Non MTW Vouchers</b>	<b>Number of Vouchers</b>
Mainstream	100
HOPWA	45
VASH	35
Stepping Stones	75
New Horizons	46
Good Samaritan	17
Master Leasing	35
Local Tenant Based Assistance	125
Expected Additions/Deletions during plan year	(-125+25) =(100)
<b>TOTAL NON MTW VOUCHERS EXPECTED BEGINNING OF YEAR</b>	<b>378</b>

Due to a grant issued by HUD Veterans Affairs Supportive Housing, we have been authorized to assist an additional 25 families in our VASH program. The Local Tenant Based Assistance program is expected to end in FY 2011 due to an end into the funding stream.

**Authority Owned (Non-HUD) Housing Stock** – In addition to the HUD programs and units identified above, HACSB owns 1,191 residential housing units and 4 commercial units (Frankish Building). 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. In 2010, HACSB sold 241 units to its affiliate nonprofit HPI Property Acquisitions LLC. A detailed list of these properties can be found in Section III – Non MTW Related Information under the Affiliate Non Profit section.

<b>HACSB HOUSING STOCK SUMMARY – AUTHORITY OWNED PORTFOLIO</b>		
<b>Property Name</b>	<b>City</b>	<b>Total Units</b>
Muni Property	Apple Valley	7
Desert View	Baker	24
Scenic View	Barstow	156
Virginia Village	Barstow	144
9 <sup>th</sup> Street Property	Colton	3
Canyon Villas	Colton	46
Las Palmas	Fontana	16
Redwood Terrace	Fontana	68
A Avenue	Hesperia	4
Sunnyside	Hesperia	30
Mesa Gardens	Hesperia	29
Sequoia	Hesperia	35
Stone Creek	Loma Linda	20
Stone Creek Apts. Van Leuven (14/8)	Loma Linda	22
Mentone (State)	Mentone	34
Crafton	Mentone	5
Kingsley Patio	Montclair	34
Bahia	Ontario	3
Frankish Building	Ontario	20
Brockton	Redlands	8
Hampton Court	Redlands	24
Lombard	Redlands	4
Stillman	Redlands	9
Merrill	Rialto	24
Arrowhead Woods	San Bernardino	51
Yucca	San Bernardino	14
Grandview Towers	Twin Peaks	40
Andalusia	Victorville	164

Sunset Gardens	Yucaipa	39
Third Street	Yucaipa	19
Yucaipa Crest	Yucaipa	45
Yucaipa Terrace	Yucaipa	51
Scattered Sites	Various	3
<b>TOTAL ALL AUTHORITY OWNED HOUSING STOCK</b>		<b>1,195</b>

### LEASING INFORMATION

<b>HACSB LEASING INFORMATION (FY 2011)</b>					
<b>Public Housing</b>		<b>Housing Choice Vouchers</b>		<b>Authority Owned Housing Units</b>	
Total Units	1,209	Total MTW Vouchers Based on ABA	8,083	Total Units	1,195
Total Units Leased	1,185	Total MTW Vouchers Leased	8,083	Total Units Leased	1,159
<b>Percent of Units Leased</b>	<b>98%</b>	<b>Percent of MTW Voucher Utilization</b>	<b>100%</b>	<b>Percent of Units Leased</b>	<b>97%</b>
		Total Non MTW Vouchers	378		
		Total Non MTW Vouchers Leased	332		
		<b>Percent of Non MTW Vouchers Leased</b>	<b>89%</b>		

**Anticipated Leasing Issues** – In April 2010, HACSB began pulling from the Housing Choice Voucher waiting list at the rate of 100 applications per week. The goal is to lease up to our MTW baseline unit level of vouchers by the end of July 2011.

Most of our non MTW voucher programs have a high utilization rate; however, HACSB has challenges with the Stepping Stones program vouchers being fully utilized. HACSB has partnered with the Department of Behavioral Health (DBH) in the Stepping Stones Program (Shelter + Care) for homeless individuals with disabilities such as severe mental illness and chronic system abuse.. Under the program requirements, HACSB provides the housing services based on referrals from DBH, which matches the housing funds by providing social services.. Because the program is targeted towards individuals only (and not families) it is challenging for

DBH to find qualified participants to refer to HACSB. The grant is currently 26% leased and we are working closely with DBH to ensure a higher number of individuals served. We were informed that the program may open up to families in October 2010 which will increase eligibility and help serve more people.

### WAITING LIST INFORMATION

**Summary** – The chart below provides a summary of the waiting list applications 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 waiting list during this plan year; however, we are currently selecting applicants from our waiting list and have pulled 565 applicants as of May 25, 2010 this year.

The public housing waiting list is project based and applicants can apply separately to each Asset Management Property (AMP) property. The waiting list for AMP 8, our High Desert site is closed due to the quantity of applicants on the list. This AMP has scattered sites that are scheduled for disposition and we anticipate completing the process in FY 2010.

<b>HACSB WAITING LISTS DEMOGRAPHICS</b>								
<b>Family Type</b>	<b>Public Housing Waiting List</b>				<b>Housing Choice Voucher Waiting List</b>			
	<b>ELI (30% AMI)</b>	<b>VLI (50% AMI)</b>	<b>LI (80% AMI)</b>	<b>TOTAL PH</b>	<b>ELI (30% AMI)</b>	<b>VLI (50% AMI)</b>	<b>LI (80% AMI)</b>	<b>TOTAL HCV</b>
Elderly	1,176	170	24	1,370	1,707	34	10	1,751
Disabled	336	78	7	421	154	101	18	273
All Other	17,902	1851	445	21,989	24,291	437	155	24,883
<b>TOTAL*</b>	<b>19,414</b>	<b>2,099</b>	<b>476</b>	<b>21,989</b>	<b>26,152</b>	<b>572</b>	<b>183</b>	<b>26,907</b>
<b>PUBLIC HOUSING AND HOUSING CHOICE VOUCHER WAITING LIST INCOME SUMMARY</b>								
TOTAL EXTREMELY LOW INCOME APPLICATIONS								45,566
TOTAL VERY LOW INCOME APPLICATIONS								2,671
TOTAL LOWER INCOME APPLICATIONS								659
<b>TOTAL APPLICATIONS FOR ALL PROGRAMS</b>								<b>48,896</b>

\*Applicants who were both Elderly and Disabled were excluded from the total to prevent double counting.

## I. NON-MTW RELATED INFORMATION

**Strategic Plan** – Our strategic plan combined with our MTW designation has served as our guiding map to meet and exceed our goals. We are guided by our vision of creating a world in which all people have a stable and enriched quality of life. We strive to build a stronger organization and a stronger community.

**Non-MTW HUD Voucher programs** – In addition to the Housing Choice Voucher Program, HACSB administers other HUD voucher programs, such as the Mainstream, HOPWA, VASH, Stepping Stones, New Horizons and Good Samaritan Program 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. We are currently authorized to assist 100 families 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. We are currently authorized to assist 45 people under this program.
- **Veteran’s Affairs Supportive Housing (VASH)** - VASH is for homeless veterans with severe psychiatric or substance abuse disorders. The Housing Authority and Veterans Administration Medical Center have partnered to provide rental vouchers and supportive services to eligible veterans. We are currently authorized to assist 35 families and have received additional funding for 25 families.
- **Stepping Stones** - This program provides rental assistance for hard to serve homeless persons with disabilities in connection with supportive services funded from sources outside the program. We are currently authorized to assist 75 families under this program.
- **New Horizons** – This program is offered through the Department of Behavioral Health for homeless individuals that are currently receiving services from the department. It was started in 2008 for a five year term and we are currently authorized to assist 46 families under this program.
- **Good Samaritan** – This program is offered through the Department of Behavioral Health for homeless individuals. This program started in 2008 and we are currently authorized to assist 17 families under this program.

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

- **Master Leasing Program** – This program is funded by State of California Mental Health funds and serves 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. We are currently authorized to assist 35 families under this program.

- **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 HACSB MTW HCV Program.

**Other Affordable Rental Housing** – HACSB owns 1,191 Non-HUD affordable 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-Profits** – Housing Partners I, Inc. (HPI, Inc.) is an affiliate non-profit of HACSB. In April, 2010, HPI I, Inc. completed construction of a new 71 unit senior development (Vista Del Sol) in North Redlands. As part of the comprehensive strategy for the redevelopment of the Redlands, Lugonia Public Housing site, senior public housing tenants from the Lugonia site were able to relocate to the new development. With nearly 20 years of housing development experience behind it, HPI I, Inc. provides HACSB the means with which to leverage a variety of public as well as private funding sources to continue to increase the supply of affordable housing throughout the county of San Bernardino. HPI Property Acquisitions LLC is an HPI I, Inc. controlled entity that owns 241 units throughout the County of San Bernardino. The list of units owned by HPI I, Inc and HPI Property Acquisitions LLC are shown below.

<b>HPI Property Acquisition LLC Portfolio</b>		
<b>Property Name</b>	<b>City</b>	<b>Total Units</b>
Acacia Property	Fontana	28
Chehalis Property	Apple Valley	30
Desert Village (PBV)	Victorville	46
Kendall Drive Apts.	San Bernardino	37
Kendall Park Apts.	San Bernardino	52
Robert O. Townsend (PBV)	Montclair	48
<b>TOTAL UNITS</b>		<b>241</b>

<b>HPI, Inc Portfolio</b>		
<b>Property Name</b>	<b>City</b>	<b>Total Units</b>
Vista del Sol	Redlands	71
<b>TOTAL UNITS</b>		<b>71</b>



**Vista del Sol, a beautiful 71 unit senior community located in Redlands, is owned by HPI I, Inc., an affiliate nonprofit of HACSB**

## 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 values that will guide it towards achieving its Mission and Vision.

- **Respect** | We believe that all people should have a stable and enriched quality of life and should be afforded the opportunity to not only survive, but to thrive in environments that are sensitive to and encourage respect and empathy for individual circumstances.
- **Safety** | We believe that all residents deserve a safe and secure living environment that is crime and distraction free where families can feel good about raising their children.
- **Integrity** | We believe that there is a strong, mutually-reinforcing connection between the integrity of our staff/programs and the success of our clients. Integrity-building within our organization is key toward fulfilling our mission statement.
- **Service** | We believe that in order to be successful we must serve the public by being effective stewards of its financial resources and by developing a customer service business model based on benchmarks and measurements.

**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. HACSB has conducted preliminary research to implement a simpler utility allowance schedule that will not only increase efficiency, but also simplify the appropriate unit search by our residents. We are in the process of preparing a detailed allowance schedule and will conduct the impact analysis shortly. The following strategies under the agency's 30 year strategic plan will direct the MTW activities under this goal:

- Ensure excellent and efficient stewardship of resources and programs
- Maintain a workplace environment that attracts and retains capable employees who feel they are making a difference
- Develop a communication program that effectively disseminates information inside and outside the Agency
- Provide world class customer service

The specific MTW Activities that address these strategies are

- Single Fund Budget with Full Flexibility
- Strategic Investment Policies
- Biennial Recertifications
- Local Verification Policies
- Elimination of Assets
- Controlled Program Moves
- Local Inspection Standards
- Local Asset Management Program
- Property Management Innovation

**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 strategy and sub-strategies will help improve the quality of lives of HACSB assisted families:

- Transform client mindset from entitlement to empowerment
  - Ensure that each client has, is committed to, and is implementing a feasible and inspiring (to them) plan for economic independence or life improvement.
  - Partner with external organizations to support clients in acquiring life skills, education and training
  - Assist clients in transitioning to Home Ownership/Market housing

The specific MTW activities that address these strategies are:

- Local Policies for Portability
- Elimination of Earned Income Disallowance
- Minimum Rent
- Pilot Work requirement
- Local Income Inclusion

- Pilot Local FSS Program
- Term Limits

**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 to expand housing opportunities:

- Have an increasingly diverse number of funding sources to provide the programs and services described in the Strategic Plan
- Improve HACSB’s existing housing stock
- Increase building stock to meet the low income housing requirements of San Bernardino County

The specific MTW activities that that address these strategies are:

- Local Project-Based Voucher Program
- Local Payment Standards
- Operating Subsidy for Vista del Sol

We are confident that our mission, vision and values coupled with our MTW objectives will help us achieve our agencies 30 year strategic plan. The strategic goals contained in our agency’s 30 year strategic plan are listed below:

<b>Strategic Goal 1:</b>	No eligible family waits longer than 10 days for housing
<b>Strategic Goal 2:</b>	Clients have achieved their own personal level of stability and economic independence
<b>Strategic Goal 3:</b>	For those whom a transition is appropriate, the maximum stay in assisted living is 5 years
<b>Strategic Goal 4:</b>	HACSB leaders and supporters are innovative policy makers and influencers of legislation
<b>Strategic Goal 5:</b>	HACSB has secured the resources needed for accomplishing its Mission
<b>Strategic Goal 6:</b>	HACSB is a leading developer and provider of affordable housing in the County of San Bernardino
<b>Strategic Goal 7:</b>	HACSB is adequately staffed with well trained and fully developed employees
<b>Strategic Goal 8:</b>	HACSB communication is open, honest and consistent
<b>Strategic Goal 9:</b>	HACSB employees have a high level of morale
<b>Strategic Goal 10:</b>	HACSB clients, programs and properties are embraced by all communities
<b>Strategic Goal 11:</b>	HACSB clients live in safe and desirable homes and communities where they can develop and prosper

## V. PROPOSED MTW ACTIVITIES

### **Activity 17: Local Income Inclusion**

**A. Description** - HACSB will implement policies to include certain income from sources in the rent calculation that are currently excluded. This activity will take effect in the Housing Choice Voucher and Public Housing Programs. The income that will be included by HACSB in the income calculations for rent are:

- a) Foster care income – Currently the income that a family receives for the care of foster children or foster adults through the Kin GAP program, a California program designed specifically for foster children who have been placed in the home of a relative, is exempt from rent calculations. The income received is for the care, feeding and clothing of the foster child or foster adult. HACSB will use all income provided to a family for the purpose of foster care in the annual income calculations. To help offset this inclusion of income; HACSB will provide a dependant allowance for foster children. Families will be notified of this change at the time of recertification and it will be effective at their next recertification. This will give families time to make the required adjustments.
- b) Sanctioned Temporary Assistance to Needy Families (TANF) income - Currently, HACSB must impute the welfare benefits resulting from a sanction by the welfare agency most commonly due to noncompliance of a family member with the welfare agency's requirement to participate in an economic self-sufficiency program or because of fraud by a family member in connection with the welfare program. However, families may be sanctioned for other noncompliance reasons under the welfare agency's requirements. This income currently cannot be imputed. As a result, HACSB must conduct a complex calculation to determine the appropriate amount of welfare income to be counted towards the family's annual income. Using our MTW flexibility, HACSB will use the family's total welfare benefit prior to any income sanction reductions. This will eliminate the complex calculation and will also encourage family's to remain in compliance with the welfare agency's requirements since all income will be counted towards their rent calculation in the Public Housing and Housing Choice Voucher programs.

**B. Statutory Objective** – 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 Impacts** – This activity will help families budget and manage their available financial resources. It will decrease their dependence on assistance for housing expenses and prepare them to achieve self-sufficiency. We also expect an increase in earned income for households receiving allowances due to their increased efforts to achieve self sufficiency.

An unanticipated impact of this activity could be a number of residents opting out of the TANF program.

**D. Baselines, proposed benchmarks, and metrics to assess outcomes –**

Currently earned income from wages for households receiving foster care allowances is tracked clearly within our VisualHOMES database. At this time earned income from wages for households receiving sanctioned TANF income is not clearly tracked since in our current system, the data could be recorded in a variety of ways. Prior to program implementation, HACSB will establish protocols to ensure consistent collection of data to establish the baseline.

Baseline	Metric	Benchmark	Expected Outcome
Earned income from wages from households receiving foster care allowance is currently \$38,373 in PH and \$701,272 in HCV	Aggregate amount of earned income from households receiving foster care allowance in PH and HCV	Increase in earned income from households receiving foster care allowance in PH and HCV	Increase earned income of households
Earned income from wages from households receiving sanctioned TANF income allowance is currently XX in PH and XXX in HCV	Aggregate amount of earned income from households receiving sanctioned welfare income allowance in PH and HCV	Increase in earned income from households receiving sanctioned TANF income allowance in PH and HCV	Increase earned income of households

**E. Data Collection and Protocols** –A financial report will be developed to track the families currently receiving the allowances and we will also track the number and percent of families receiving foster care income on our programs.

**F. Authorization Cited** – HACSB is authorized to undertake this initiative through Attachment C (D) 2 (a) which waives certain provisions of Section 8(o)(7)(a), 8(o)(13)(F) and 8(o)(13)(G) of the 1937 Act and 24 C.F.R 982.303, 982.309 and 983 Subpart F.

**G. Rent Reform Initiatives:**

- a. **Board Approval** – Attached in the appendices
- b. **Impact Analysis** – Attached in the appendices
- c. **Annual Re-evaluation** – A re-evaluation of this policy will be completed on an annual basis.
- d. **Hardship** - Attached in the appendices

- e. **Transition Period** – Families receiving foster care income will be informed at their next recertification (annual, biennial or interim) and the inclusion will not occur until their second annual recertification. The sanctioned TANF income inclusion will be effective at their next interim examination.
- f. **Public Hearing** – This activity was included as part of the Public Hearing.

### **Activity 18: Property Management Innovation:**

**A. Description** - HACSB will develop a property management program that reflects the private sector property management principles. This activity will be implemented in all five asset management projects. The objective is to adopt and implement policies and principles, currently used in the private sector, to decrease management costs, improve the quality of our units and assist our tenants in becoming familiar with private sector property management practices. The following items are proposed to be revised –through our Property Management Innovation Activity:

- 14 day notice - The current notice for public housing families who have not paid their rent on time is a 14 day notice to pay their rent or vacate their property. California State requires at least a 3 day notice and we plan to adopt a notice requirement between the 3 and 14 day notice period. .
- NSF (Non sufficient funds) and late fees – NSF fees are proposed to be \$25.00 for the first check and \$35.00 for each additional check instead of the current \$25.00 fee for all N.S.F. checks. Late fees in the private sector are between 5-10% of market rent and HACSB is proposing to increase the late fees currently at \$20.00 to a maximum not to exceed 5% of market rent
- Security deposits- California law provides for security deposits in the amount two months rent. The current security deposit charged is \$500.00 and HACSB is proposing to raise it to one month’s market rent.
- Security deposit incentives (for no move-out damages) – In order to decrease the vacancy turnaround costs, we propose to offer an incentive to families to encourage a move out process that does not damage the unit.
- Implement a holding deposit (not to exceed \$200)
- Eliminate flat rent option unless 30% exceeds flat rent – HACSB will choose the lower of the flat rent or the 30% income rent for all participants.
- Leasing of larger units– In order to allow residents to choose to do so we propose to allow families pay an increased percentage of their income (up to 40%) toward rent.
- Pet Free Policy – HACSB will adopt a pet-free policy at all 5 AMPs and will only permit animals that assist, support or provide services to persons with disabilities. Pets that are currently registered with the AMPs will be exempt from this policy.

During our research we found the policies in place at our management projects were not as stringent compared to the private sector which could result in additional expenses of federal dollars in maintaining the property. This would also assist residents in acclimating to private sector practices. Managers observed that damages done to the unit far exceeded the security deposit and we hope to limit those expenses by reducing the number of days the tenant is

allowed in the unit once served the notice. This can be done in accordance with California Civil Code of Procedure Section 1161.

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

**B. Anticipated Impacts** –The anticipated impact of this activity is increased efficiency in the management of our Public Housing portfolio. This will help decrease the overall per unit expense on our properties. In addition, it will assist residents in acclimating to private sector management practices.

**C. Baselines, proposed benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Expected Outcome
Current average per unit costs (per month) in AMPs is \$528	Average per unit cost per AMP	Average per unit costs(per month) in AMPs is \$517	Improved property management will lead to lowered per unit costs
Current average vacancy turnaround costs is \$3,793 per unit	Dollars spent on vacancy turnarounds	Average vacancy turnaround cost per unit is \$3,600	Less damage to units resulting in lower vacancy turnaround costs
Current total operations & maintenance expenses are \$234 per unit/per month	operations & maintenance expenses	Total operations and maintenance expense per unit/per month is \$229	Decrease in dollars spent on maintaining properties

**D. Data Collection and Protocols** – The per unit costs, vacancy turnaround costs and operations & maintenance expenses will be collected from the quarterly financial statements prepared through our GP Dynamics financial management software system and other data will be collected from Visual Homes.

**E. Authorization Cited** – HACSB is authorized to undertake this initiative through Attachment C (C) 9(b) which waives certain provisions of Section 6 (l) of the 1937 Act and 24 C.F.R 966 Subpart A and B and Attachment C (C) 10 which waives certain provisions of Sections 3,6,7,16 and 31 of the 1937 Act and 24 C.F.R. 945 subpart C, 960 Subparts B, D, E and G.

**F. Rent Reform Initiatives:**

- a. **Board Approval** – Attached in the appendices
- b. **Impact Analysis** – Attached in the appendices
- c. **Annual Re-evaluation** – A re-evaluation of this policy will be completed on an annual basis.
- d. **Hardship** - Attached in the appendices

- e. **Transition Period** – Effective at the annual recertification following the implementation date.
- f. **Public Hearing** – This activity was included as part of the Public Hearing.

### **Activity 19: Pilot Local FSS Program**

**A. Description** - HACSB will develop and implement a pilot local FSS (Family Self Sufficiency) program to help families in their self sufficiency efforts. The pilot program will be offered to new FSS applicants in the Housing Choice Voucher and Public Housing Programs. All families currently in the FSS program will remain in the traditional program which will remain unchanged.

The purpose of the FSS program is to coordinate housing assistance with public and private resources to enable assisted families to achieve economic self sufficiency. FSS families continue to pay rent in accordance with increases in income similar to non FSS families. The difference is that the amount of increase in a family rent resulting from an increase in earned income is deposited into an escrow account. The money is released to the head of household at the end of the contract provided that all the terms have been met and the family is not receiving welfare benefits for 12 consecutive months. There are no restrictions or guidelines on how the escrow funds should be spent by the family after the term of their participation.

HACSB proposes to replace the escrow account with an interest bearing “savings” account. Participants will have access to the funds during their FSS contract term as long as the funds are used for self sufficiency activities. HACSB has observed many instances where current FSS participating families needed access to their funds during the contract term for expenses such as college tuition, books, child care or transportation. Even though interim disbursements are permitted by HUD FSS regulations, our current program does not allow for cash disbursements during the contract term. The proposed new savings account will allow them this flexibility. We plan to develop an approval/review process for requests for disbursements from the saving account. Applicants will complete a “Withdrawal Request Form”, which will be reviewed by the FSS coordinator and approved if it is evident that the funds will be used for self-sufficiency activities. If denied, participants will be provided with an informal review process for further consideration. The interim disbursement checks will be made directly for the thing to be procured. Using our MTW flexibility, at the end of their FSS contract, program participants will only be eligible to receive the remaining balance if they voluntarily terminate their assistance from the voucher or public housing program due to self sufficiency efforts. We also hope to use this opportunity to revamp and improve our current FSS program.

The local FSS program will be offered to new FSS participants and a pilot group will be established. This group will be compared to a group of new applicants on our traditional FSS program. We hope to start this program in conjunction with our term limits activity that will implement a 5 year term on housing assistance for all non elderly and non disabled households. The option to request funds during the program will help them in their self

sufficiency activities. Some participants will be able to use their savings at the end of their term as a down payment for a new home or as security deposit for their new rental home.

**B. Statutory Objective** – 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 Impacts** – The anticipated impact of this activity is increased savings and increase earned income for participants. Using the flexibility of withdrawing funds during their FSS contract term, participants will overcome roadblocks on their path to self sufficiency. Since self sufficiency is required to access the savings at the end, they will be encouraged to exercise their flexibility and use funds for self sufficiency activities. Another possible unanticipated impact would be an increase in families signing up for the home ownership program.

**D. Baselines, proposed benchmarks, and metrics to assess outcomes** –

Baseline	Metric	Benchmark	Expected Outcome
Ratio of Earned income at start of activity of pilot program participants and traditional FSS participants	Earned income of pilot program participant and traditional FSS participant	Ratio of earned income from pilot program participants is higher to traditional FSS	Increase in earned income from pilot participants versus traditional FSS escrow participants
Participant’s completing Contract of Participation in both Pilot and traditional FSS programs.	Number of participants who complete the contract and leave program	Number of people who successfully complete the Contract of Participation.	Higher number of people on pilot program achieve self sufficiency

**E. Data Collection and Protocols** – A baseline report will be developed to identify the total number of FSS participants and their current escrow accounts. We plan to study the difference in savings among our pilot group and the traditional FSS participants along with differences in earned income. All accounts will be tracked through new Tracking at Glance software. We will also track the number and reasons for the withdrawal requests to make sure it does not create an administrative burden.

**F. Authorization Cited** – HACSB is authorized to undertake this initiative through Attachment C (E) which waives certain provisions of Section 23 of the 1937 Act and 24 C.F.R. 984.

## **Activity 20: Term Limits**

**A. Description** – HACSB will implement a term limit on housing assistance for applicants pulled from the HCV waiting list beginning on April 1, 2011, excluding elderly and disabled (including all portability vouchers). The goal is to help our participants achieve true self sufficiency by assisting them with their housing needs for a specific term. This will incentivize our participants to focus on securing better employment and prepare them for a better future. Families will be given notices at every annual recertification indicating the number of years remaining on their term limited voucher along with continuous referral services to a variety of available resources.

<b>PARTICIPANTS TERM (LEFT THE PROGRAM)</b>	<b>PERCENTAGE</b>	<b>CUMULATIVE TOTAL</b>
0 – 2 YEARS	29.10%	
3 – 4 YEARS	19.56%	49%
5 – 6 YEARS	14.10%	63%
7 – 9 YEARS	16.38%	79%
10 – 14 YEARS	11.25%	90%
15 – 19 YEARS	6.19%	97%
20 – 24 YEARS	2.44%	99%
25 + YEARS	0.98%	100%

The average stay for current residents in our program is around 8 years and for those who left the program (excluding elderly and disabled) is 6.7 years. In addition we found that the average stay of over 49% of residents that left the program was less than 5 years. An additional 14% left the program within seven years. Based on this data we feel the appropriate term for or voucher should be five years.

**B. Statutory Objective** – 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 Impacts** – The anticipated impact of this activity is an increase in participation in self sufficiency activities by participants. The time limit of assistance will encourage families to get involved in many services referred by the Agency to aid in the path to self sufficiency. This could result in participants seeking better employment or removing barriers to better opportunities. Some residents may use this as an opportunity to prepare themselves for home ownership by saving funds or repairing bad credit.

Our current HCV waiting list has 26,907 applicants and the term limit will increase our ability to serve more families with a decreased wait time for assistance. The processes of terming out and pulling new applicants may result in an increase in administrative burden but

the number of families served and the number of families becoming self sufficient will increase.

**D. Baselines, proposed benchmarks, and metrics to assess outcomes –**

<b>Baseline</b>	<b>Metric</b>	<b>Benchmark</b>	<b>Expected Outcome</b>
Zero term limited vouchers	Number of households	276 term limited vouchers will be issued by Sept 30, 2011	Families will leave program before term limited voucher expires
Average wait list time in HCV program is 4.35 years	Number of years	Average wait list time in HCV program decreases to 2.35 years by Sept 30, 2016.	More families served
Zero term limited voucher holders leave program	Number of households	138 households voluntarily leave program prior to term limit expiration by Sept 30, 2016*	Families will work toward self sufficiency and leave program

\*Represents 50% of term limited vouchers issued by Sept 30, 2011

**E. Data Collection and Protocols** – The number of households that choose to leave the program before the expiration of the term limited voucher will be tracked. The average time participants have to wait for assistance will also be measured for the baseline at the start of the activity.

**F. Authorization Cited** – HACSB is authorized to undertake this initiative through Attachment C (D) 2(d) which waives certain provisions of Section 8(o)(7) and 8(o)(13)(F)-(G) of the 1937 Act and 24 C.F.R 982 Subpart L and 983 Subpart E.

**G. Rent Reform Initiative**

- a. **Board Approval** – Attached in the appendices
- b. **Impact Analysis** – Attached in the appendices
- c. **Annual Re-evaluation** – A re-evaluation of this policy will be completed on an annual basis.
- d. **Hardship** - Attached in the appendices
- e. **Transition Period** – Effective at the annual recertification following the implementation date.
- f. **Public Hearing** – This activity was included as part of the Public Hearing.

## VI. ONGOING MTW ACTIVITIES

In the Initial Moving to Work (MTW) Plan submitted to HUD for FY 2009, HACSB proposed and adopted 12 MTW Activities. Subsequently we proposed 3 additional activities in our FY 2010 MTW Plan and one activity in Amendment 2 to the FY 2010 Plan. We continue to develop and implement all of our activities except Activity 3: Alternate Assessment Programs which we will be working with other MTW Agencies to develop a demonstration wide Alternate Assessment Program. A brief update on each of our ongoing activities is provided in this section.

### **Activity 1: Single Fund Budget with Full Flexibility**

**A. Activity Plan Year** – This activity was initially included in HACSB’s FY 2009 Initial MTW Plan and was implemented on October 1, 2009.

- a. Description** – HACSB has combined 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 adopted through our MTW Plans and provide flexibility to redistribute resources among federal programs based on actual needs.
- d. Baselines, proposed benchmarks, and metrics to assess outcomes** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measurements in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Shortfall or Excess in HCV	FYE 2009 HCV operating shortfall of \$4,799,052	Dollar amount of shortfall/ Percentage of excess	No program has a shortfall and no program has an excess of more than 5%	Programs funded based on need
Shortfall or Excess in Public Housing	FYE 2009 Public Housing Operating shortfall of \$4,790,069	Dollar amount of shortfall/ Percentage of excess	No program has a shortfall and no program has an excess of more than 5%	Programs funded based on need

**e. Data Collection and Protocols** – We used financial data from fiscal year 2009 to establish the baseline. An annual financial report and analysis has been developed to measure actual annual costs and percent of total funding of each program.

**B. Status Update** - HACSB developed its FY 2010 budget with one MTW fund combining all revenue sources from Housing Choice Vouchers, Public Housing and Capital Funds. On a monthly basis we monitor the actual versus budgeted to ensure compliance by programs. It is anticipated that no budget revisions will be necessary and that all programs will remain compliant with the approved budget.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

**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 HACSB’s FY 2009 Initial MTW Plan and is set for implementation in September 2010.

**a. Description** - HACSB is working to adopt investment policies consistent with California Government Code and/or HUD approved investment criteria to the extent such policies are in compliance with applicable OMB circulars and other federal laws. HACSB will 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** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measures in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Average interest earned on MTW	1.72% interest earned on MTW	Interest earned on	Percentage increase in	Increased overall

funds invested during FY 2009	funds invested during FY 2009	MTW funds invested	investment earnings over State LAIF interest rates	investment returns
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e. **Data Collection and Protocols** – Investment data from FY 2009 was used to establish the baseline. After implementation of this activity, 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** – By October 2010, HACSB will develop an investment policy for MTW funds which will be consistent with California Government Code Section 53630 and/or HUD approved investment criteria. Once the investment policy is approved, we will consult with an investment strategist in order to establish a time laddered investment pool. These investments will be evaluated at the end of every month to ensure that our earnings are over the State’s LAIF rate of returns.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

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

**Activity 4: Biennial Recertifications**

**A. Activity Plan Year** – This activity was initially included in HACSB’s FY 2009 Initial MTW Plan and was implemented on October 1, 2009.

a. **Description** - HACSB has implemented biennial recertifications for elderly and disabled households that have no other adult members and for which there is no earned income 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 effectiveness in federal expenditures.

c. **Anticipated Impacts** - This activity has generated reduction in staff time associated with processing recertifications and has resulted in reduced reporting burdens for the affected families. HACSB will realize the full impacts of this activity after our first complete year of implementation in October 2010.

d. **Baselines, benchmarks, and metrics to assess outcomes** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measurements in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Total number of staff hours to complete recertification	306 hours for Public Housing; 2,224 hours for HCV in FY 2009	0.85 hours to conduct recertification for eligible families	153 hours to complete recertification in PH: 1122 hours for HCV. The benchmarks will be the same for all forthcoming years.	Total number of staff hours reduced
Actual number of families eligible to complete recertification packet bi-annually	360 eligible families in Public Housing; 2,640 in HCV.	Number of families completing packet annually.	Of total eligible families, 180 will complete packet annually and 1320 in HCV. The benchmarks will be the same for all forthcoming years	Reduced reporting burden for families as less families complete recertification packets

- e. **Data Collection and Protocols** - A time study has been conducted to establish our baseline measurements and will be conducted on a biannual to confirm the estimated time for completion of annual re-certifications for the affected families under this activity. In addition, we have developed reports through our VisualHOMES software system that allow us to track the total number of families converted to biennial recertifications.

**B. Status Update** – This activity was implemented on October 1, 2009 for recertifications with an effective date of January 1, 2010. Based on comparison of data from our first and second time studies we have already seen a significant reduction in staff time associated with this activity. However, full implementation of this activity, and full time savings, will not be seen until 2011 due to our staggered implementation over two years. Anecdotal feedback from affected families has been positive.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

**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 HACSB’s FY 2009 Initial MTW Plan and became effective October 1, 2009.

- a. Description** - HACSB has implemented local verification policies for both the Public Housing and Housing Choice Voucher programs. For new admissions we will only verify documents provided by the applicant with no third party verification required. Verification for continued eligibility is first based on HUD EIV reports and other up-front verifications, if available, then documents viewed, and third party verification for any discrepancies based on our local schedule of values established through our Administrative Plan.
- b. Statutory Objectives** - This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures.
- c. Anticipated Impact** – Based on the results from our first and second time studies to evaluate staff time associated with this activity we have seen a significant reduction in the amount of time it takes to process verifications. Anecdotally staff believes that the local verification activity has resulted in more accurate income calculations due to more recent income information. HACSB has implemented a new measurement described in section d below that will quantitatively capture this information and see if data collected is indeed more accurate.
- d. Baselines, benchmarks, and metrics to assess outcomes** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measurements in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Total number of staff hours to process verifications	1,133 hours to process verifications in Public Housing; 5,814 in HCV	Hours to conduct verifications per family (0.7 in PH and 0.8 in HCV)	705 hours to process verification in PH: 3875 in HCV. The benchmarks will be the same for all forthcoming years.	Total number of staff hours reduced which allows staff to focus on other MTW activities
Income variation between documents viewed and third party confirmation for new applicants	Will establish during our 1 <sup>st</sup> 2010 Quarterly Report and provide in FY 2011 Plan.	Dollar value of variation	The dollar variation between documents viewed and EIV is no more than 10%. The benchmarks will be the same for all forthcoming years.	Accurate income information from applicants results in correct subsidy.

- e. **Data Collection and Protocols** - A time study has been conducted to confirm the time for completion of third party verification under this activity. We will conduct a time study twice a year to determine if time savings are realized. In addition we will be sampling files and checking the income variation between documents viewed and third party confirmations to determine if reported income is at least as accurate as third party verifications under our local verification policies.
- B. **Status Update** – This activity has resulted in significant time savings that have been documented through our time studies. In addition, income calculations based on our local verification policies appear to be as accurate as or more accurate than under the HUD regulations. We will confirm accuracy of income verifications through our new measurement that will be documented in our FY 2010 Annual Report.
- C. **Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.
- 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 HACSB’s FY 2009 Initial MTW Plan and was implemented on October 1, 2009 for new admissions and for recertifications with an effective date of January 1, 2010.
  - a. **Description** – HACSB has eliminated the inclusion of income from assets in the calculation of tenant rent in both the Public Housing and Housing Choice Voucher programs. Information on assets is not required to be reported by families and is not being verified by HACSB.
  - b. **Statutory Objectives** – This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures.
  - c. **Anticipated Impact** – This activity has generated staff time reductions which have been verified by our first and second time studies. In addition, HACSB is monitoring whether there will be a reduction in rental revenue in the Public Housing program and an increase in Housing Assistance Payments in the Housing Choice Voucher program by asking (although not requiring) participants to self-report, although not verify, any assets on their recertification questionnaire.
  - d. **Baselines, benchmarks, and metrics to assess outcomes** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measures in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Total hours of staff time to collect and calculate asset income for PH	178 hours to collect and calculate asset income in Public Housing	Hours	Zero hours in FY 2010 to collect and calculate asset income for PH	178 total staff hours reduced.
Total hours of staff time to collect and calculate asset income for HCV	1,300 hours to collect and calculate asset income in HCV	Hours	Zero hours in FY 2010 to collect and calculate asset income in HCV.	1,300 total staff hours reduced.

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. Asset information will continue to be collected by each family to determine possible unanticipated impacts, such as a reduction in rental revenue in the Public Housing program and/or an increase in Housing Assistance Payments in the Housing Choice Voucher program.

**B. Status Update** – Effective October 1, 2009 HACSB eliminated income from assets in the calculation of tenant rent. HACSB has conducted two time studies to confirm that a reduction in staff time to process asset verifications has been realized. Participants are still being asked to report any asset income on their recertification documentation although HACSB is not verifying or including any of the asset income. This data is being recorded into our VisualHOMES software system and an analysis will be conducted to determine if there is a financial impact of eliminating assets from our rent calculations that differs from our initial impact analysis provided in our FY 2009 Initial MTW Plan.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

**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 HACSB’s FY 2009 Initial MTW Plan and became effective on February 1, 2010.

a. **Description** – HACSB has limited 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. Exceptions to this policy, including moves for reasonable accommodations, self-sufficiency activities, and others have been developed and adopted through the Agency’s Administrative Plan and are being tracked by HACSB. This policy will be effective only upon execution of a new HAP contract at the time of a program move for current participants and upon initial lease up for applicants.

- b. Statutory Objectives** - This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures.
- c. Anticipated Impact** – Once this activity is fully implemented there will be 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** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measures in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Percent of total voluntary program moves each year	12.7% of participants moved voluntarily in FY 2009	Percent of families that voluntarily move each year	No more than 4% of total participants move voluntarily each year. The benchmark will remain the same for all forthcoming years.	Families voluntarily move only every other year
Number of staff hours spent annually processing program moves	4,599 hours to process program moves annually.	4.8 hours to process a program move	1448 hours spent to process moves annually.	3151 hours in staff time saved processing fewer moves.

- e. Data Collection and Protocols** - A time study has been conducted to confirm the average time to complete the entire move process. We will update the time study twice a year to confirm that time savings are being realized. The number of families who request and are subsequently approved for moves are being tracked and a report has been developed to monitor the percent of families moving and the voucher success rate of these families.

**B. Status Update** – This activity became effective February 1, 2010. Any family that requests to move, or any new lease-ups, will be briefed in detail on the requirements under this activity. However, the limitation on moves will not become effective until after a family moves, a new HAP contract with a two year term is executed with the landlord, and an HACSB MTW Voucher is signed by the participant. Because the limitation on program moves will become effective after the participant’s next move, time savings from this activity will be realized over a longer period of time than some of our other administrative efficiency activities. We are closely monitoring this activity and will have more detailed information and measurements on the impact in our FY 2010 Annual Report.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

**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 HACSB’s FY 2009 Initial MTW Plan and was modified through our FY 2010 Plan. The initial implementation of this activity began on October 1, 2009. The proposed work requirement for portability that was authorized through our FY 2010 Plan is expected to be implemented by August 2010.

- a. **Description** - HACSB applies all MTW requirements to inbound and outbound portability participants. HCV participants porting into San Bernardino County or porting out to another jurisdiction are required to comply with HACSB’s MTW policies and requirements. In addition, a requirement to be employed will be implemented for eligible participants porting into HACSB’s jurisdiction. This work requirement is currently in the analysis and planning phase and is expected to be implemented by July 2010.
- b. **Statutory Objectives** – This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures. In addition, this activity also 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** – This activity will generate staff time reductions and reduce the accounts payable from initial PHAs. A possible impact that HACSB is monitoring is a decrease in housing choice options for families who are interested in moving to San Bernardino County, but do not qualify because they are not compliant with the MTW requirements, including work requirements.

- d. **Baselines, benchmarks, and metrics to assess outcomes** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measures in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Average staff time spent to process in-bound portability	2,004 hours to process in-bound ports in FY 2009	Hours to process inbound portability	1002 hours to process in-bound ports. The benchmark will be the same for all forthcoming years.	Reduction in staff time to process portability
Average staff time spent to process out-bound portability	319 hours to process out-bound ports in FY 2009	Hours to process out-bound portability	160 hours to process out-bound ports. The benchmark will be the same for all forthcoming years.	Reduction in staff time to process portability
Percent of HAP and Admin Fee Accounts Receivable due to untimely payments from Receiving PHA's	\$257,488, which is .36% of the HAP and Admin Fee accounts were receivables due from PHAs for portability	Percent of annual HAP receivable from portability	Portability receivables – FY 2010 -\$244,613; FY 2011 – \$232,383 FY 2012 –\$220,764 FY 2013 – \$209,725 FY 2014 - \$199,239	Increase in cash available to make timely HAP payments

- e. **Data Collection and Protocols** – HACSB has conducted a time study to establish a baseline for the average time it takes to complete processing of both an in-bound and out-bound portability family. We will conduct two time studies a year to monitor the time savings associated with this activity. 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. We are also analyzing portability data to determine the total number of families requesting to port in and total number requesting to port out. A financial report has been developed to monitor the impact on the HCV accounts payable amount.

**B. Status Update** – The application of all HACSB MTW Activities to portability families began on October 1, 2009. Our modification to this activity through the FY 2010 MTW Plan, the portability work requirement, is expected to be implemented on August 1, 2010. Currently we are in the process of communicating proposed requirements to neighboring

housing authorities and have prepared “HACSB Fact Sheets” to distribute to inquiring ports that includes a description on all HACSB MTW Activities, including the work requirement.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

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

### **Activity 9: Elimination of Earned Income Disallowance**

**A. Activity Plan Year** - This activity was initially included in HACSB’s FY 2009 Initial MTW Plan and became effective on October 1, 2009 for participants in the Housing Choice Voucher and Public Housing programs.

- a. **Description** - HACSB has eliminated the HUD Mandatory Earned Income Disallowance (MEID) from the calculation of total tenant payment and replaced it with the rent reform activities authorized under the MTW Agreement and exercised in MTW Plans. However, any participants who were receiving EID prior to the implementation date are allowed to continue to receive the disallowance through September 30, 2011 or until their eligibility for EID expires, whichever comes first.
- 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 impact of this activity has provided opportunities to families to increase their self-sufficiency by better mirroring financial incentives in the unsubsidized housing portfolio. In addition, HACSB anticipates some time savings associated with no longer managing the intricate details of this complex rent calculation component. An unanticipated impact that is being monitored by HACSB is 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** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measurements in our FY 2010 Annual Report.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Public Housing participants receiving EID with earned income	31 Public Housing participants receiving EID with earned income	Families that retain earned income	15 families will retain earned income upon expiration of EID	Families working towards self-sufficiency
HCV participants receiving EID with earned income	5 HCV participants receiving EID with earned income	Families that retain earned income	2 families will retain earned income upon expiration of EID	Families working towards self-sufficiency
Total staff hours to manage EID in Public Housing	52.7 total hours spent in FY 2009 to manage EID in Public Housing	staff time to manage EID	Zero hours in staff time spent to manage EID in PH.	Savings of 52.7 hours in staff time annually upon phase out of EID.
Total staff hours to manage EID in HCV	5.7 total hours spent in FY 2009 to manage EID in HCV	staff time to manage EID	Zero hours in staff time spent to manage EID in HCV.	Savings of 5.7 hours in staff time annually upon phase out of EID.

e. **Data Collection and Protocols** –The current EID households are being tracked to determine if they retain earned income after elimination of the program. A time study has been conducted to confirm the average time to manage the Earned Income Disallowance over the life of the exemption and hours saved in staff time are being calculated accordingly. In addition, HACSB will conduct a time study twice a year to ensure time savings are being realized.

**B. Status Update** – Through this activity HACSB does not offer the HUD mandatory EID from the calculation of total tenant payment to any new participants. However, participants who received EID as of October 1, 2009 will continue to receive EID for two years or until they phase out of the program in accordance with the HUD regulatory requirements.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

**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 HACSB’s FY 2009 Initial MTW Plan and became effective on October 1, 2009 for recertifications and January 1, 2010 for all families.
- a. Description** - HACSB has increased 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** – HACSB anticipates a decrease in the number of zero income households and an 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** – In our FY 2009 Annual Report we provided detailed measurements for this activity. We have included these measurements in the chart below and will provide updated measures in our FY 2010 Annual Report.

Final Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Percent of Public Housing families TTP <\$125.00	9.4% of Public Housing families have TTP <\$125.	Percent of households at minimum rent	8.4% of PH families with TTP<\$125,000	1% reduction in the number of households paying minimum rent
Percent of HCV families with TTP <\$125.00	8.6% of HCV families have TTP <\$125	Percent of households at minimum rent	7.6% of HCV families with TTP<\$125.00	1% reduction in the number of households paying minimum rent
HCV Current earned income from households with TTP <\$125	HCV current earned income from households with TTP <\$125 is	Aggregate amount of earned income from households	HCV current earned income from households with TTP<\$125.00 is \$864,851.	Increased earned income of households

Final Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Outcome
	\$786,228	with TTP <\$125		
PH current earned income from households with TTP < \$125	PH current earned income from households with TTP <\$125 is \$422,501	Aggregate amount of earned income from households with TTP <\$125	PH current earned income from households with TTP<\$125.00 is \$464,751.	Increased earned income of households
Reduced HAP expense in HCV for households with TTP<\$125.00	Monthly HCV HAP expense for families with TTP <\$125 is \$462,320*	Monthly percentage decrease in HAP expense	Monthly HAP expenses in HCV f or families with TTP <\$125 is \$434,581	Additional revenue available to meet other local goals and assist more families
Increase rental revenue in Public Housing from households with TTP<\$125.00	Current PH rental revenue from families with TTP<\$125 is \$11,383	Monthly percentage increase in rental revenue	PH rental revenue from minimum rent households is \$17,074	Additional revenue available to meet other local goals and assist more families

e. **Data Collection and Protocols** – A report has been developed to track the total number and percent of minimum rent families in each program each year. A financial report has been developed to measure the increased rental revenue and the decrease in average HAP for the minimum rent families. We are also tracking the increase in earned income for families whose minimum rent were raised.

**B. Status Update** – HACSB raised the minimum rent from \$50.00 to \$125.00 and established a temporary waiver for families who demonstrated a hardship in paying the increased required minimum amount. As of April, we received eight hardship requests in the HCV program. However, the eight hardship requests did not meet the criteria established through our Administrative Plan and therefore the families continued to pay the HACSB required minimum rent. HACSB is continuing to closely monitor this activity, especially the impact on participants.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

**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 initially included in HACSB's FY 2009 Initial MTW Plan. HACSB has been working to develop a detailed Local Project-Based Voucher Administrative Plan chapter and implementation procedures. It is expected that this activity will be fully implemented September 1, 2010.

**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 impacts of this activity are enhanced ability of HACSB to serve more families through the Project-Based Voucher program.

**d. Baselines, benchmarks, and metrics to assess outcomes** – In our FY 2009 Annual Report we provided detailed measurements for this activity. Revised measurements are being submitted with our FY 2010 Amendment #3.

**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. Status Update** – HACSB has been developing a detailed local Project-Based Voucher (PBV) program that address the varying needs of our community and maximizes the use of mixed financing to develop new affordable housing opportunities for low-income

families. We are modifying our Administrative Plan and expect the activity to be fully implemented on September, 2010. HACSB has two Project-Based Voucher initiatives that will be implemented this year – a newly constructed senior community Vista del Sol and the conversion of all scattered site Public Housing units to Project-Based Vouchers. The flexibility afforded by this activity is critical to the success of our PBV initiatives. An amendment to our FY 2010 Plan is being submitted to include additional flexibilities.

**C. Proposed Modifications** – An amendment to our FY 2010 Plan is being submitted to include additional flexibilities.

**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 initially included in HACSB’s FY 2009 Initial MTW Plan and modified through our FY 2009 Annual Report.

**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. HACSB applies any payment standard updates, whether an increase or a reduction, at recertification.

**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, benchmarks, and metrics to assess outcomes** – Baseline measurements will be established after the completion of the market study by our third party firm. We expect the firm to be completed with their study by the Fall of 2010.

Measurements			
Baseline	Metric	Benchmark	Outcome
Current percentage of families residing in impacted areas	Percent of families that move to less impacted areas	1% of program families move to less impacted areas per year	Families have increased housing options in lower poverty areas.
Number of HCV landlords	Number of first time landlords in the program	25 first time landlords will execute HAP	Families have increased housing options with new

		contracts each year	landlords.
Number of Class B or greater multi-family complexes currently accepting HCV	Number of Class B or greater multi-family apartment complexes accepting vouchers for the first time.	1 additional Class B or greater apartment complex will execute a HAP contract each year.	Families have increased housing options through additional apartment complexes.

**e. Data Collection and Protocols** – A third party firm has been procured to conduct an independent extensive market study 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. Status Update** – HACSB has contracted a third party real estate analysis firm to prepare a detailed study on the various rental submarkets that exist with the largest county geographically in the contiguous United States. It is expected that their analysis will be completed by the Fall of 2010 and the implementation of Local Payment Standards will occur by January 1, 2011. HACSB will provide a detailed status update, including baseline measurements, on our Local Payment Standards activity in our FY 2010 Report.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

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

**Activity 13: Local Inspection Standards**

**A. Activity Plan Year** - This activity was adopted in our FY 2010 MTW Plan and is anticipated to be implemented in October 2010.

a. **Description** - HACSB will develop and implement local inspection standards for the Housing Choice Voucher program that will increase the Agency’s operational efficiencies as well as provide better housing options to low-income families. The Agency will develop a property rating system in alignment with HQS and local enhanced standards. This rating system will help determine the frequency of inspections based on the rating assigned to the specific property. Some properties may be inspected biennially 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. In addition, HACSB is considering allowing landlords to self-certify minor repair items. The Agency will continue to conduct random quality control inspections and emergency inspections.

- b. **Relation to Statutory Objective** – This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures and to provide better housing options to low income families.
- c. **Anticipated Impacts** – This activity will enable the Agency to develop local inspection standards that meet the need of the community, allow for flexibility, and produce a reduction in administrative burden for both the Agency and landlords. We also anticipate an increase in quality housing choice options for low-income families over time as the landlords are incentivized to maintain higher quality units on the program.
- d. **Baselines, benchmarks, and metrics to assess outcomes** –

Measurements			
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
Actual 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 at end of base 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, including the number of units inspected with serious/life-threatening violations. 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. HACSB will also develop a report to monitor the number and type of self-certification of minor fail items.

**B. Status Update** – HACSB has worked extensively to determine the criteria for our Local Inspection Standards that will build on HUD’s Housing Quality Standards. The Agency has studied the experiences of other MTW Agencies, analyzed HUD’s HQS requirements, discussed a range of options with our inspectors, held landlord focus groups and conducted a survey with landlords. The Agency is in the process of finalizing the components of our Local Inspections Standards activity and will provide detailed information, including measurements, in our FY 2010 Annual Report.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

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

**Activity 14: Local Asset Management Program**

**A. Activity Plan Year** - This activity was described in Plan Year 2010 and an amendment to this activity was submitted on July 15, 2010.

- a) **Description** - HACSB will develop a local asset management program based on private sector property management principles.
- 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 effective to the private sector and help us make informed decisions about long term maintainability of the properties in the public housing portfolio.
- d) **Baselines, proposed benchmarks, and metric**

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.

**B. Status Update** – After conducting extensive implementation sessions for this activity, the HACSB team realized that much of our proposed “Local Asset Management” program should be authorized through a separate MTW Activity that addresses streamlined property management policies and rent reform activities. As a result, we amended our FY 2010 Plan to reflect the activities related to HUD Asset Management. Our Amendment was submitted on July 15, 2010.

**C. Proposed Modifications** – An amendment to this activity has been proposed and will be submitted to HUD shortly.

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



Face painting at a children's event at our Waterman Gardens Public Housing Community.

### **Activity 15: Pilot Work Requirement**

**A. Activity Plan Year** - This activity was described in Plan Year 2010 and we expect to implement this activity in the Fall of 2010.

**a. Description** – HACSB will implement a pilot work requirement for residents of the Medical Center Asset Management Project (AMP) and for incoming ports in the Housing Choice Voucher program. The Medical Center development is a traditional public housing property that will receive an infusion of approximately \$7 million in capital improvements over the next two years.

**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 for the Medical Center AMP is increased earned income for residents, 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, benchmarks, and metrics to assess outcomes** – Prior to implementation of this activity HACSB will establish detailed measurements, including the following:

Measurements			
Baseline	Metric	Benchmark	Expected 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.
Current average household rent charged	Average amount of monthly household rent	Increase of 2% per year in monthly household rent	Increased revenue to support property operations.

e. **Data Collection and Protocols** – HACSB is currently working with the Loma Linda University School of Social Work to develop a detailed assessment of the families currently living at the Medical Center AMP. This assessment will assist HACSB in understanding the complex needs that exist at the development. Based on the results of the assessments, HACSB will work to ensure that the community resources are available to assist families in finding employment or other self-sufficiency activities. Other data will be collected through our VisualHOMES software system and will be monitored closely.

**B. Status Update** – HACSB has conducted intensive implementation strategy meetings since approval of our FY 2010 Annual Plan. Our project team has defined the definition of “work” under this activity which will encompass activities under 3 distinct groups: employment, activities leading to gainful employment and activities removing barriers to gainful employment. Participants can participate in activities removing barriers to employment such as volunteer or medical treatment (e.g. substance abuse) for up to two years. HACSB is working with Loma Linda University to develop a needs assessment at Medical Center in order to facilitate services on site that meet the needs. We are also developing a Services Directory that will have a listing of local services. In addition, the fact sheets on pilot work requirements have been provided to residents. HACSB is carefully planning the implementation of this activity and expects an implementation date of Fall 2010 due to the magnitude of this activity’s impact on HACSB participants at the Medical Center AMP.

**C. Proposed Modifications** – There are no proposed modifications to this activity in FY 2011.

**D. Outside Evaluators** - HACSB has partnered with Loma Linda University to develop a Needs Assessment of all residents of Medical Center and anticipates continuing a relationship with Loma Linda in evaluating the impact of the Work Requirement at the Medical Center Community.

**Activity 16: Operating Subsidy for Vista del Sol**

**A. Activity Plan Year** - This activity was adopted through the second Amendment to our FY 2010 MTW Plan and was implemented on April 23, 2010.

- a. Description** – Vista del Sol is a new 71 unit affordable senior housing community developed by HACSB’s affiliated non-profit, Housing Partners I Inc. HUD approved a temporary operating subsidy of approximately \$134,000 from our MTW block grant funds to make the units affordable to low income seniors. As soon as the HACSB Housing Choice Voucher Program is able to afford the lease up of Project-Based Vouchers in this community the operating subsidy will cease and the 53 units will convert to Project Based Vouchers.
- b. Relation to Statutory Objectives** - This activity addresses the MTW statutory objective to increase housing options for low-income families.
- c. Anticipated Impact** – This activity will ensure that 53 additional seniors will have quality, affordable housing. Without this MTW Activity these apartments likely would have remained vacant until such time as Project-based Vouchers were available.
- d. Baselines, benchmarks, and metrics to assess outcomes** – HACSB established the following measurements through our Amendment and will report in detail on these measurements in our FY 2010 report.

Measurements			
Baseline	Metric	Benchmark	Outcome
Total projected operating budget shortfall	Dollar amount of shortfall	Zero operating budget shortfall on a monthly basis	Units occupied by low-income seniors
Average income each Vista del Sol tenants	Average income of each tenant	Zero seniors are served by operating subsidy who have incomes over 80% of AMI	Units occupied by low-income seniors

**e. Data Collection and Protocols** - A baseline report has been developed to identify the operating budget shortfall that would have existed without the Project-based Vouchers immediately prior to the development’s completion. HACSB is monitoring the monthly operating statements from Vista del Sol to ensure that the MTW Funds are being used for income-eligible families only and that the project remains financially viable with no operating budget shortfall.

**B. Status Update** –The certificate of occupancy for Vista del Sol was received on April 19, 2010 and residents began moving in on April 23, 2010. The operating subsidy approved by HUD through our Use of Funds Application and subsequent Amendment to the FY 2010 MTW Plan have ensured that this development will remain financially viable and that 53 seniors are able to afford the rents on their units until such time that Project-Based Vouchers

become available. HACSB is in the final stages of its local Project Based Voucher program implementation and will soon apply for PBVs for Vista del Sol. It is anticipated that the 53 units being supported under this activity will become PBVs in August 2010. As of May 24, 2010, 51 of the 53 units are leased and the operating subsidy for the month of April and May was \$28,435. The anticipated subsidy required from May – September is \$129,283 which is below the \$134,000 approved by HUD through Amendment 2 of the FY 2010 Annual Plan.

**C. Proposed Modifications** - There are no proposed modifications to this activity in FY 2011.

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



Mario Saucedo (Commissioner) and Pat Gilbreath (Mayor for the City of Redlands) at the ribbon cutting ceremony for Vista del Sol on April 28, 2010

## 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 2011 (October 1, 2010- September 30, 2011). 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.

<b>CONSOLIDATED SOURCES AND USES OF MTW FUNDS (FISCAL YEAR 2011)</b>		
<b>REVENUE (SOURCES)</b>		
Housing Choice Voucher Program HAP	\$67,346,371	
Housing Choice Voucher Program Admin Fees	\$6,274,408	
Other Administrative Fees	\$294,395	
Public Housing Operating Fund	\$6,135,627	
Public Housing Capital Fund	\$4,283,436	
Rental Income (Public Housing)	\$5,102,756	
Miscellaneous Income	\$338,605	
Investment Income	\$0	
<b>TOTAL REVENUE</b>		<b>\$89,775,598</b>
<b>EXPENSE (USES)</b>		
Administration and General Expense	\$13,004,128	
Utilities	\$1,292,214	
Operations and Maintenance	\$5,261,637	
Extraordinary Maintenance	\$45,000	
Housing Assistance Payments	\$63,940,722	
Development and Capital Projects	\$3,210,840	
<b>TOTAL EXPENSE</b>		<b>\$86,754,541</b>
<b>TRANSFERS, RESERVES &amp; NET INCOME</b>		
Operating Transfers In/(Out)		\$0
Reserve Drawdown / (Buildup)		- \$3,021,057
<b>NET INCOME/LOSS</b>		<b>\$0</b>

2. **Planned Sources and Uses of Non MTW Funds-** The chart below summarizes the HACSB Consolidated Non MTW Budget for the Fiscal Year 2011 (October 1, 2010- September 30, 2011). 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//repair&replacement reserves.

<b>CONSOLIDATED SOURCES AND USES OF NON- MTW FUNDS</b>	
<b>(FISCAL YEAR 2011)</b>	
<b>REVENUE (SOURCES)</b>	
Grants	\$3,957,361
Rental Income (Authority Owned Portfolio)	\$9,721,758
Administrative Fees	\$4,319,295
Investment Income	\$168,031
Miscellaneous Income	\$1,524,127
<b>TOTAL REVENUE</b>	<b>\$19,690,572</b>
<b>EXPENSE (USES)</b>	
Administration and General Expense	\$8,843,416
Utilities	\$930,598
Operations and Maintenance	\$2,960,379
Extraordinary Maintenance	\$20,037
Housing Assistance Payments	\$3,957,361
<b>TOTAL EXPENSE</b>	<b>\$16,711,791</b>
<b>TRANSFERS, RESERVES &amp; NET INCOME</b>	
Operating Transfers In/(Out)	<b>0</b>
Replacement Reserves	<b>0</b>
Reserve Drawdown / (Buildup)	<b>-2,978,781</b>
<b>NET INCOME/LOSS</b>	<b>\$0</b>

The ARRA grants will provide additional revenue to our budget on an annual basis for the next two years; however, there will be development costs associated with those grants. The anticipated amount for each fiscal year can be found on the bottom table.

#### HACSB CFRG & CFRC GRANTS

	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>Total</b>
<b>REVENUES</b>				
CFRG & CFRC Grants	4,300,000	3,656,000	478,689	8,434,689
<b>EXPENDITURES:</b>				
Development & Capital Projects	4,300,000	3,656,000	478,689	8,434,689
<b>Net Income/Loss</b>	-	-	-	-

These funds are in addition to our MTW and Non-MTW budgets provided in the FY 2010-2011 Annual Plan. These additional funds do not modify our plan and/or budget stated in the FY 2010-2011 Annual Plan.

**B. Planned Sources and Uses of State/Local Funds-** The chart below summarizes the HACSB State and Local Funds Budget for the Fiscal Year 2011 (October 1, 2010-September 30, 2011). 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.

<b>SOURCES AND USES OF STATE AND LOCAL FUNDS (FISCAL YEAR 2011)</b>	
<b>REVENUE (SOURCES)</b>	
Rental Income	\$560,596
Investment Income	\$0
Miscellaneous Income	\$8,588
<b>TOTAL REVENUE</b>	<b>\$569,184</b>
<b>EXPENSE (USES)</b>	
Administration and General Expense	\$207,511
Utilities	\$73,158
Operations and Maintenance	\$151,548
Extraordinary Maintenance	\$1,320
<b>TOTAL EXPENSE</b>	<b>\$433,537</b>
<b>TRANSFERS, RESERVES &amp; NET INCOME</b>	
Operating Transfers In/(Out)	- 84,685
Replacement Reserves	-23,878
Reserve Drawdown / (Buildup)	-27,084
<b>NET INCOME/LOSS</b>	<b>\$0</b>

**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 2011 (October 1, 2010-September 30, 2011). 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.

<b>SOURCES AND USES OF CENTRAL OFFICE COST CENTER (FISCAL YEAR 2011)</b>	
<b>REVENUE (SOURCES)</b>	
Administrative Fees	\$ 3,955,539

Miscellaneous Income	\$	805,656	
<b>TOTAL REVENUE</b>			<b>\$ 4,761,195</b>
<b>EXPENSE (USES)</b>			
Administration and General Expense	\$	5,008,716	
Utilities	\$	39,772	
Operations and Maintenance	\$	129,158	
<b>TOTAL EXPENSE</b>			<b>\$ 5,177,646</b>
Operating Transfers In/(Out)			<b>\$ 416,451</b>
<b>NET INCOME/(LOSS)</b>			<b>\$ 0</b>

#### D. Cost Allocation or Fee for Service Methodology

HACSB is utilizing the HUD prescribed Fee for Service approach with no deviations for Fiscal Year 2011.

#### E. Single Fund Flexibility

HACSB plans on using its Block Grant based on need and single fund budget flexibility in FY 2011 as follows:

<b>Funding Source</b>	<b>Block Grant Amount</b>	<b>Budgeted Expenses</b>	<b>Transfer In / (Out)</b>	<b>Reserves Drawdown/(Buildup)</b>
Housing Choice Voucher	--	\$70,341,292	\$70,341,292	--
Public Housing Program	--	\$6,165,346	\$6,165,346	--
Public Housing Capital Fund	--	\$4,283,436	\$4,283,436	--
Moving to Work Fund	\$84,039,842	\$227,711	\$(83,811,131)	\$(3,021,057)
<b>Totals</b>	<b>\$84,039,842</b>	<b>\$81,018,785</b>	<b>\$(3,021,057)</b>	<b>\$(3,021,057)</b>

## 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 Evaluation 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.

APPENDIX A: BOARD RESOLUTION ADOPTING 2011 PLAN

Attached on the following page.

**RESOLUTION NO. 2282**

**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 30, 2009, HUD approved the Housing Authority of the County of San Bernardino's FY 2009-2010 Annual MTW Plan; and

**WHEREAS**, the Housing Authority of the County of San Bernardino desires to implement the activities in the Fiscal Year 2010-2011 MTW Annual Plan that will increase operational efficiency and innovation; promote family self-sufficiency 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 2010-2011 Moving to Work Annual Plan.

Adopted: July 14, 2010

C E R T I F I C A T E

I, Susan L. Benner, Executive Director of the Housing Authority of the County of San Bernardino hereby certify that the attached Resolution No. 2282 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 the regular meeting of July 14, 2010.

July 15, 2010  
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 ~~10-1-2010~~ 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.

HOUSING AUTHORITY OF THE  
COUNTY OF SAN BERNARDINO

PHA Name

CA 019

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 SAUCEDS	Title CHAIRMAN
Signature X <i>Mario Saucedo</i>	Date 7-14-10

# 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 Federalagency 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

Maria G. Razo

Title

Deputy Executive Director, Office of Business Administration

Signature

X 

Date

7-14-10

## APPENDIX B: PUBLIC PROCESS (including Public Hearing Minutes)

The following steps were taken by HACSB to ensure a thorough public process in the development and adoption of the FY 2010-2011 MTW Annual Plan:

Friday, May 28: Public notice published in the San Bernardino Sun announcing the public hearing on Tuesday, June 29<sup>rd</sup>; text and Affidavit of Publication included as part of Appendix B.

Plan posted on HACSB's website and made available at HACSB offices.

Tuesday, June 23: Public Hearing held; minutes included as part of Appendix B.

Wednesday, July 14: Approval by Board of Commissioners – Resolution included in Appendix A.

HACSB supports resident and community participation in the development of our MTW program. The proposed activities were presented to the Resident Advisory Board meeting (attended by Resident Advisors from all AMPS) and their response was very supportive. In some cases we take extra steps to educate and involve impacted customers. For our Local Inspection Standards, we sought input from the landlords by organizing a landlord session to discuss the activity and we plan to incorporate their ideas into the implementation of this activity. Prior to implementation of our work requirement for Local Policies for Portability, we had conference calls with neighboring housing authorities to inform and discuss our policy.

We were disappointed that neither members of the public nor community stakeholders attended the public hearing. In order to reach out to a wider audience we will advertise MTW plans in two additional local papers that cater to minorities. Our proposed FY 2010-2011 MTW Annual Plan is posted on our website for comments and feedback.

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

SUKET DAYAL  
HOUSING AUTHORITY/SAN BERNARDIN  
715 E BRIER DR  
SAN BERNARDINO, CA - 92408-2841

SBS #: 1870804

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

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:

05/28/2010

Executed on: 05/28/2010  
At Los Angeles, California

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

*Helen Tang*

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) 2010-2011 MTW Plan. The FY 2010-2011 MTW Plan will be available to the public for review at the following location from Monday, May 31, 2010 through Tuesday, June 29, 2010:

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

The Fiscal Year 2010-2011 MTW Plan will also be available on HACSB's website at [www.hacsb.com](http://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 29, 2010 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.  
5/28/10

SBS-1870804#



\* A 0 0 0 0 0 1 7 0 3 3 5 0 \*

**HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO  
MOVING-TO-WORK ANNUAL PLAN PUBLIC HEARING  
HELD ON JUNE 29, 2010**

The Housing Authority of the County of San Bernardino (Housing Authority), California held a public hearing for the 2010-2011 Moving to Work (MTW) Annual Plan at the Housing Authority's Administration Office at 715 East Brier Drive, San Bernardino, CA 92408 on June 29, 2010.

Present: Susan Benner, Executive Director  
Maria Razo, Deputy Executive Director, Office of Business Administration

**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 2010-2011 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 28, 2010. The plan was advertised in the San Bernardino Sun (county newspaper), The Precinct Reporter (a minority publication), 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 Maria Razo, Deputy Executive Director, Office of Business Administration, presiding. Ms. Razo explained that the purpose of this hearing was to provide interested parties with an opportunity to present questions and/or comments regarding the FY 2010-2011 Moving to Work Annual Plan before it is submitted to the U.S. Department of Housing and Urban Development (HUD) for final approval.

MTW Annual Plan Public Hearing (June 29, 2010)

**I. Comments**

There were neither members of the public nor representatives of any other agencies in attendance, and the hearing was adjourned at 10:15 a.m.

**APPENDIX C: CAPITAL FUND FIVE YEAR PLAN & BUDGET**

Attached on following page

**Housing Authority of the County of San Bernardino  
Capital Fund Program- Five Year Plan & Budget (2011-2015)**

<b>AMP 202</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Cal 19-18 - N. Berkeley St.	San Bernardino	6	50,000	2011	Landscape/Fencing/504
Cal 19-19 - W. Evans St.	San Bernardino	24	50,000	2011	Landscape/Fencing/504/Exterior Stairway
Cal 19-32 - Genevieve	San Bernardino	8	50,000	2011	Landscape/Fencing/504/Exterior Stairway
Cal 19-32 - Genevieve	San Bernardino	8	143,750	2012	R/R Roof
Cal 19-18 - 2nd St.	San Bernardino	4	23,500	2012	Site Improvement
Cal 19-18 - 4th Street	San Bernardino	6	150,000	2013	R/R Roof
Cal 19-14 - Lugo Ave.	San Bernardino	8	75,000	2013	Site Improvement
Cal 19-18 N. Berkeley St.	San Bernardino	6	75,000	2013	Site Improvement
Waterman Gardens	San Bernardino	246	406,115	2013	Redevelopment Activity
Cal 19-18 - King Street	San Bernardino	2	50,000	2014	Site Improvement
Cal 19-31 - N. "E" Street	San Bernardino	24	75,000	2014	Site Improvement
Cal 19-34 - Lynnwood	San Bernardino	15	50,000	2014	Site Improvement
Waterman Gardens	San Bernardino	246	406,115	2014	Redevelopment Activity
Cal 19-14 - Lugo Ave.	San Bernardino	8	150,000	2015	R/R Roof and Repair Subfloors
Cal 19-19 - W. Evans St.	San Bernardino	24	100,000	2015	Repair Subfloors
Cal 19-31 - N. "E" Street	San Bernardino	24	100,000	2015	Repair Subfloors
Cal 19-18 - 4th Street	San Bernardino	6	75,000	2015	Site Improvement
Waterman Gardens	San Bernardino	246	406,115	2015	Redevelopment Activity
<b>Total- AMP 202</b>			<b>2,435,595</b>		

<b>AMP 203</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Medical Center	San Bernardino	296	200,000	2011	Interior Improvements/Electrical/Plumbing
Medical Center	San Bernardino		12,500	2011	Com Center/Office Upgrades
Cal 19-18 - W. 8th St.	San Bernardino	6	25,000	2012	Repave Driveway
Medical Center	San Bernardino		20,000	2012	Com Center/Office Upgrades
Medical Center	San Bernardino	296	140,700	2012	Interior Improvements/Electrical/Plumbing
Cal 19-18 - N. Davidson	San Bernardino	6	150,000	2013	R/R Roof/Repair subfloors
Cal 19-18 - 11th Street	San Bernardino	2	75,000	2013	R/R Roof/Repair subfloors
Cal 19-18 - Turrill	San Bernardino	2	75,000	2013	R/R Roof/Repair subfloors
Medical Center	San Bernardino	296	200,000	2013	Electrical/Plumbing Improvements
Cal 19-18 - W. 8th St.	San Bernardino	6	55,000	2013	Site Improvement
Cal 19-18 - W. 7th St.	San Bernardino	6	55,000	2013	Site Improvement
Cal 19-18 - W. 8th St.	San Bernardino	6	125,000	2014	R/R Roof/Repair subfloors
Cal 19-18 - W. 7th St.	San Bernardino	6	125,000	2014	R/R Roof/Repair subfloors
Medical Center	San Bernardino	296	175,000	2014	Electrical/Plumbing Improvements
Cal 19-18 - "J" Street	San Bernardino	2	65,000	2015	R/R Roofs
Cal 19-18 - "J" Street	San Bernardino	2	50,000	2015	Site Improvement
Medical Center	San Bernardino	296	200,000	2015	Electrical/Plumbing Improvements
<b>Total- AMP 203</b>			<b>1,748,200</b>		

**Housing Authority of the County of San Bernardino  
Capital Fund Program- Five Year Plan & Budget (2011-2015)**

<b>AMP 205</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Redlands - Lugonia Site	Redlands	113	406,115	2011	Redevelopment Activities
Cal 19-05 - Redlands	Redlands	75	200,000	2011	Electrical/Plumbing/Interior Improvements
Cal 19-05 - Redlands	Redlands		250,000	2011	Street Improvements/R/R Waterlines
Cal 19-32 - E. 9th St.	Highland	12	150,000	2012	R/R Roof
Cal 19-05 - Redlands	Redlands		12,500	2012	Com Center/Office Upgrades
Redlands - Lugonia Site	Redlands	113	406,115	2012	Redevelopment Activities
Cal 19-05 - Redlands	Redlands		25,000	2013	Com Center/Office Upgrades
Cal 19-05 - Redlands	Redlands	75	75,000	2014	R/R Waterlines
Cal 19-05 - Redlands	Redlands	75	137,500	2014	Electrical/Plumbing/Interior Improvements
Cal 19-05 - Redlands	Redlands		25,000	2015	Com Center/Office Upgrades
<b>Total- AMP 205</b>			<b>1,687,230</b>		

<b>AMP 206</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Cal 19-06 - Chino	Chino	50	200,000	2011	Electrical/Plumbing/Interior Improvements
Cal 19-04 - Colton	Colton	85	12,500	2011	Com Center/Office Upgrades
Cal 19-04 - Colton	Colton	85	200,000	2012	Electrical/Plumbing/Exterior Improvements
Cal 19-06 - Chino	Chino	50	43,750	2012	R/R waterlines
Cal 19-06 - Chino	Chino	50	40,000	2013	R/R waterlines
Cal 19-06 - Chino	Chino		15,000	2014	Com Center/Office Upgrades
Cal 19-06 - Chino	Chino	50	143,398	2014	Electrical/Plumbing/Interior Improvements
Cal 19-04 - Colton	Colton	85	153,398	2015	Electrical/Plumbing/Interior Improvements
Cal 19-04 - Colton	Colton	85	125,000	2015	R/R waterlines
<b>Total- AMP 206</b>			<b>933,046</b>		

<b>AMP 207</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Cal 19-07 - Barstow	Barstow	60	93,398	2011	Electrical/Plumbing/Exterior Improvements
Cal 19-07 - Barstow	Barstow	60	175,000	2012	Electrical/Plumbing/Exterior Improvements
Cal 19-13 - Barstow	Barstow	88	171,698	2012	Electrical/Plumbing/Exterior Improvements
Cal 19-07 - Barstow	Barstow		12,500	2012	Com Center/Office Upgrades
Cal 19-07 - Barstow	Barstow	60	72,000	2013	Electrical/Plumbing/Exterior Improvements
Cal 19-13 - Barstow	Barstow	88	71,398	2013	Electrical/Plumbing/Exterior Improvements
Cal 19-07 - Barstow	Barstow		10,000	2014	Com Center/Office Upgrades
Cal 19-07 - Barstow	Barstow	60	137,500	2014	Electrical/Plumbing/Interior Improvements
Cal 19-13 - Barstow	Barstow	88	75,000	2015	Electrical/Plumbing/Interior Improvements
<b>Total- AMP 207</b>			<b>818,494</b>		

**Housing Authority of the County of San Bernardino  
Capital Fund Program- Five Year Plan & Budget (2011-2015)**

<b>AMP 208</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
			-		
no planned activities at this time					
<b>Total- AMP 208</b>			-		

<b>AMP 209</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
			-		
no planned activities at this time					
<b>Total- AMP 209</b>			-		

<b>AGENCY WIDE</b>					
<b>Development Account</b>			<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Operations			500,000	2011-2015	Operations
Management Improvements			700,000	2011-2015	
Administration			400,000	2011-2015	
Fees & Costs			200,000	2011-2015	Architects, Inspection Costs
Audit			10,000	2011-2015	Audit Program
Non-Dwelling Equipment			10,000	2011-2015	Misc equipment
Relocation Costs			25,000	2011-2015	
Debt Service Pledge			642,716	2011-2015	CFFP
<b>Total - Agency Wide</b>		<b>X5</b>	<b>12,438,580</b>		

<b>Grand Total- All AMP's</b>	<b>20,061,145</b>
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**Housing Authority of the County of San Bernardino  
Capital Fund Program- ARRA Formula Funds Budget (CFRG)**

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

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

<b>AMP 205</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Cal 19-05 - Redlands	Redlands	75	95,000	2009	LBP Removal/Exterior Improvements
Cal 19-05 - Redlands	Redlands	75	216,011	2009	R/R Windows
Cal 19-05 - Redlands	Redlands	75	393,029	2009	R/R Roofs
Cal 19-05 - Redlands	Redlands	75	134,783	2009	Rough Carpentry
Cal 19-05 - Redlands	Redlands	75	418,916	2009	Exterior Lath & Plaster
Cal 19-05 - Redlands	Redlands	75	28,785	2009	Paint
Cal 19-05 - Redlands	Redlands	75	82,650	2009	HVAC (Coolers)
Cal 19-05 - Redlands	Redlands	75	37,240	2009	Electrical
Cal 19-05 - Redlands	Redlands	75	63,585	2009	Doors, Frames, Hardware & Screens
Cal 19-05 - Redlands	Redlands	Comm Bl	35,000	2009	Comm. Center/Office Upgrades
Redlands - Lugonia Site	Redlands	113	217,689	2009	Redevelopment Activities
<b>Total- AMP 205</b>			<b>1,722,688</b>		

<b>AMP 206</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Cal 19-04 - Colton	Colton	85	182,000	2009	LBP Removal/Exterior Improvements
Cal 19-04 - Colton	Colton	85	187,331	2009	R/R Windows
Cal 19-04 - Colton	Colton	85	438,948	2009	R/R Roofs
Cal 19-04 - Colton	Colton	85	145,776	2009	Rough Carpentry
Cal 19-04 - Colton	Colton	85	455,000	2009	Exterior Lath & Plaster

**Housing Authority of the County of San Bernardino  
Capital Fund Program- ARRA Formula Funds Budget (CFRG)**

Cal 19-04 - Colton	Colton	85	38,800	2009	Paint
Cal 19-04 - Colton	Colton	85	97,000	2009	HVAC (Coolers)
Cal 19-04 - Colton	Colton	85	41,415	2009	Electrical
Cal 19-04 - Colton	Colton	85	68,274	2009	Doors, Frames, Hardware & Screens
Cal 19-04 - Colton	Colton		35,000	2009	Com Center/Office Upgrades
Cal 19-06 - Chino	Chino	50	101,000	2009	LBP Removal/Exterior Improvements
Cal 19-06 - Chino	Chino	50	135,850	2009	R/R Windows
Cal 19-06 - Chino	Chino	50	294,050	2009	R/R Roofs
Cal 19-06 - Chino	Chino	50	99,344	2009	Rough Carpentry
Cal 19-06 - Chino	Chino	50	175,941	2009	Exterior Lath & Plaster
Cal 19-06 - Chino	Chino	50	30,490	2009	Paint
Cal 19-06 - Chino	Chino	50	64,500	2009	HVAC (Coolers)
Cal 19-06 - Chino	Chino	50	32,000	2009	Electrical
Cal 19-06 - Chino	Chino	50	46,825	2009	Doors, Frames, Hardware & Screens
Cal 19-06 - Chino	Chino		35,000	2009	Com Center/Office Upgrades
Cal 19-10 - Colton	Colton		25,000	2009	A&E Costs
<b>Total- AMP 206</b>			<b>2,729,544</b>		

<b>AMP 207</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this AMP					
<b>Total- AMP 207</b>			-		

<b>AMP 208</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this time					
<b>Total- AMP 208</b>			-		

<b>AMP 209</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this time			-		

**Housing Authority of the County of San Bernardino  
Capital Fund Program- ARRA Formula Funds Budget (CFRG)**

<b>Total- AMP 209</b>			-		
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<b>AGENCY WIDE</b>					
<b>Development Account</b>			<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Management Improvements			40,000	2009	IT Software
Administration			400,000	2009	
A&E Fees & Costs			121,457	2009	
<b>Total - Agency Wide</b>			<b>561,457</b>		

<b>Grand Total- All AMP's</b>	<b>5,078,689</b>
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**Housing Authority of the County of San Bernardino  
Capital Fund Program- ARRA Competitive Funds Budget (CFRC)**

<b>AMP 202</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this AMP					
<b>Total- AMP 202</b>			<b>0</b>		

<b>AMP 203</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Cal 19-03 - Medical Center	San Bernardino	296	2,062,253	2010	Window replacement
Cal 19-03 - Medical Center	San Bernardino	296	354,301	2010	Solar photovoltaic system
Cal 19-03 - Medical Center	San Bernardino	296	357,000	2010	Cooler Replacement
<b>Total- AMP 203</b>			<b>2,773,554</b>		

<b>AMP 205</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this AMP					
<b>Total- AMP 205</b>			<b>0</b>		

<b>AMP 206</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this AMP					
<b>Total- AMP 206</b>			<b>0</b>		

**Housing Authority of the County of San Bernardino  
Capital Fund Program- ARRA Competitive Funds Budget (CFRC)**

<b>AMP 207</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this AMP					
<b>Total- AMP 207</b>			-		

<b>AMP 208</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this time					
<b>Total- AMP 208</b>			-		

<b>AMP 209</b>					
<b>Development</b>	<b>City</b>	<b>Units</b>	<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
no planned activities at this time			-		
<b>Total- AMP 209</b>			-		

<b>AGENCY WIDE</b>					
<b>Development Account</b>			<b>Budget</b>	<b>Plan Year</b>	<b>Activities</b>
Administration			335,600	2009	
A&E Fees & Costs			246,846	2009	
<b>Total - Agency Wide</b>			<b>582,446</b>		

<b>Grand Total- All AMP's</b>	<b>3,356,000</b>
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**APPENDIX D: SUMMARY CHART OF MTW ACTIVITIES**

<b>ONGOING ACTIVITIES</b>			
<b>ACTIVITY</b>	<b>DESCRIPTION</b>	<b>STATUTORY OBJECTIVE</b>	<b>PLAN YEAR</b>
<b>Activity 1</b>	Single Fund Budget	Operational Efficiency	FY 2009
<b>Activity 2</b>	Strategic Investment Policies	Operational Efficiency	FY 2009
<b>Activity 4</b>	Biennial Recertifications	Operational Efficiency	FY 2009
<b>Activity 5</b>	Local Verification Policies	Operational Efficiency	FY 2009
<b>Activity 6</b>	Elimination of Assets	Operational Efficiency	FY 2009
<b>Activity 7</b>	Controlled Program Moves	Operational Efficiency	FY 2009
<b>Activity 8</b>	Local Policies for Portability	Self-Sufficiency	FY 2009
<b>Activity 9</b>	Elimination of Earned Income Disallowance	Self-Sufficiency	FY 2009
<b>Activity 10</b>	Minimum Rent	Self-Sufficiency	FY 2009
<b>Activity 11</b>	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009
<b>Activity 12</b>	Local Payment Standards	Expanding Housing Opportunities	FY 2009
<b>Activity 13</b>	Local Inspection Standards	Operational Efficiency	FY 2010
<b>Activity 14</b>	Local Asset Management Program	Operational Efficiency	FY 2010
<b>Activity 15</b>	Pilot Work Requirement	Self-Sufficiency	FY 2010
<b>Activity 16</b>	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010

<b>POSTPONED ACTIVITY</b>			
<b>ACTIVITY</b>	<b>DESCRIPTION</b>	<b>OBJECTIVE</b>	<b>PLAN YEAR</b>
<b>Activity 3</b>	Alternate Assessment Program	Operational Efficiency	FY 2009

<b>PROPOSED ACTIVITIES</b>		
<b>ACTIVITY</b>	<b>DESCRIPTION</b>	<b>STATUTORY OBJECTIVE</b>
<b>Activity 17</b>	Local Income Inclusion	Self-Sufficiency
<b>Activity 18</b>	Property Management Innovation	Operational Efficiency
<b>Activity 19</b>	Pilot Local FSS program	Self-Sufficiency
<b>Activity 20</b>	Term Limits	Self-Sufficiency

**Activity 17: Local Income Inclusion**

HACSB will implement policies to include certain income, like income received for foster care and sanctioned Temporary Assistance to Needy Families, in the calculation of a tenant's income that are currently excluded. This activity will be implemented in both the Public Housing and Housing Choice Voucher Program.

**Foster Care**

HACSB excludes payments received for the care of foster children or foster adults and benefits received through the Kin GAP program, a California program designed specifically for foster children who have been placed in the home of a relative, as well as other foster care payments that must be excluded according to HUD regulations. However, according to program guidelines foster care reimbursement is to be used for care, clothing and feeding of the foster child. As a result, HACSB will include these payments as part of the household's income. To help offset this inclusion of income; HACSB will provide a dependent allowance for foster children.

**Participant Impact –**

Currently there are 136 families in HCV (1.8% of the portfolio) and 13 families in Public Housing (.7% of the portfolio) who have foster children for a total of 223 foster children in HCV and 19 in Public Housing. 95 HCV families and 11 Public Housing families receive foster care payments on behalf of 167 children in HCV and 17 children in Public Housing. These foster care payments amount to a total of \$1,415,484 in HCV and \$109,812 in Public Housing of which \$1,414,356 is excluded from the rent calculation in HCV and \$109,812 is excluded in Public Housing.

The average foster care payment per HCV child is \$8,476 and \$6,460 in Public Housing. The average foster care exclusion in HCV is \$8,469 and is \$6,460 in Public Housing.

By including all income received for foster care affected participants in the HCV program will see their Total Tenant Payment increase by an average of \$442 and their tenant rent to owner increase by an average of \$288. Affected public housing residents will see their rent increase by an average of \$335. However, the \$480 dependent allowance will slightly offset this increase in TTP.

By implementing this activity, HACSB anticipates encouraging families to increase their earned income. Currently, of the 136 families in HCV with foster children, 44 have earned income at an average of \$15,938. Of the 13 Public Housing Families with foster children 3 have earned income at an average of \$12,791.

**Hardship Policy –** HACSB will inform all affected families at their next annual recertification of this policy change and estimate the increase in total tenant payment that will result from the inclusion of foster care income. If the family is over housed currently they will be provided an opportunity for a program move. The inclusion of foster care income will not occur until the second annual recertification.

**Agency Impact** – This activity will result in a decreased HAP payment in the HCV program by approximately \$48,088 on a monthly basis and an increase in rental income by approximately \$3,685 per month in the Public Housing program. HACSB also expects to see an associated reduction in HAP and increase in tenant rent due to an increase in tenant earned income.

### **Sanctioned TANF income**

**Participant Impact** – Temporary Assistance to Needy Families (TANF) provides temporary financial assistance to families in order to promote self-sufficiency. Currently, HACSB must impute the welfare benefits resulting from a sanction by the welfare agency because a family member is in noncompliance with the welfare agency’s requirement to participate in an economic self-sufficiency program or because of fraud by a family member in connection with the welfare program. However, families may be sanctioned for other noncompliance reasons under the welfare agency’s requirements. This income currently cannot be imputed.

As a result, HACSB must conduct a complex calculation to determine the appropriate amount of welfare income to be counted towards the family’s annual income. Using our MTW flexibility, HACSB will use the family’s total welfare benefit prior to any income sanction reductions. This will eliminate the complex calculation and will also encourage family’s to remain in compliance with the welfare agency’s requirements since all income will be counted towards their rent calculation in the Public Housing and HCV programs.

HACSB does not currently track the amount of excluded sanctioned income through our Visual Homes software system. We do, however, know how many families have included sanctioned welfare income (which is reported on the 50058 as “Imputed Welfare Income”). There are 169 participants in HCV and 23 in Public Housing with imputed welfare income. This total imputed welfare income amounts to an average of \$2,174 in HCV \$2,546 in Public Housing. We envision a larger number of participants under our new policy to have imputed welfare income although the average amount of that imputed income will remain similar. Prior to implementation of this activity we will begin tracking the excluded sanctioned income and will conduct a more rigorous impact analysis with that data to completely understand the family impact.

HACSB envisions this activity having a positive impact on participant self-sufficiency by implementing identical guidelines as the TANF Agency and encouraging families to remain in compliance with their self-sufficiency activities.

**Hardship Policy** – HACSB will maintain the current regulations regarding imputed income from TANF which allows Public Housing residents to request a grievance hearing and HCV households to request an informal review. Upon request, HACSB will provide in writing an explanation of the calculation of imputed welfare income. Additionally, HACSB will begin tracking the excluded sanctioned welfare income and will re-evaluate the implementation of this activity based on the collected data.

**Agency Impact** – It is expected that this activity will result in a decreased HAP payment in the HCV program and an increase in rental income in the Public Housing program. After we collect

more data on excluded sanctioned welfare income we will be better able to estimate this Agency impact.

### **Activity 18: Property Management Innovation:**

HACSB will develop a property management program in our Public Housing Program that reflects the private sector property management principles. This activity will be implemented in all five asset management projects. The objective is to adopt and implement policies and principles, currently used in the private sector, to decrease management costs, improve the quality of our units and assist our tenants in becoming familiar with private sector property management practices. Some families are currently living in a unit smaller than they would prefer as a result of HACSB's occupancy standards. However, some of these families could afford to pay up for a larger unit if, like the HCV program, they were allowed to pay up to 40% of their income in rent. Through the Property Management Innovation activity, HACSB will allow residents to move to a unit larger than they qualify for if they can afford to pay for the increase in cost.

**Participant Impact:** Participants will be impacted by this activity only if they request to move to a larger unit and can afford to pay for a larger unit. The impact on a tenant's rent portion will not exceed 40% of their adjusted monthly income.

**Agency Impact** – The agency will be able to better meet the needs of its residents and will be able to retain higher income families by allowing them more housing choice.

### **Activity 20-: Term Limits**

HACSB will implement a term limit on housing assistance for applicants pulled from the HCV waiting list beginning on April 1, 2011, excluding elderly and disabled (including all portability vouchers). The goal is to help our participants achieve true self sufficiency by assisting them with their housing needs for a specific term. This will incentivize our participants to focus on securing better employment and prepare them for a better future. Families will be given notices at every annual recertification indicating the number of years remaining on their term limited voucher along with continuous referral services to a variety of available resources.

**Participant Impact** – The average number of years that current participants have been on our program is 8.19 years. For non elderly and non disabled participants who left the program, the average length of stay was 6.70 years. Approximately 49% of the participants who left the program had a length of stay of less than 5 years.

We compared our analysis with national data on length of stay in the Housing Choice Voucher program. For example, in Cityscape: A Journal of Policy Development and Research, Volume 6, Number 2, 2003 published by the US Department of Housing and Urban Development's Office of Policy Development and Research it was reported that the median length of stay in the Tenant-Based Voucher program is 3.08 years. For families with children the median stay is 2.68 years. For households that are disabled the median stay is 3 years and for households that are elderly the median stay is 5.33 years. Also according to the report, "The difference between

mean (4.75 years) and median (3.08) years also indicated a skewed distribution, with the bulk of households having short stays.”

The participant impact of this activity will be increased participation in self sufficiency activities and those that remove barriers to better employment. Some families may use this as an opportunity to prepare themselves for home ownership.

**Agency Impact** – HACSB anticipates turning over vouchers quicker and being able to serve more families with our MTW Funds. There is a tremendous demand for assistance and currently there are 26,907 people on our HCV waiting list. The median length of stay in the HCV program should decrease and might reduce to the national average numbers provided above.

**Hardship Policy** – Prior to term limited voucher expiration, HACSB will allow the term limited voucher families the opportunity for an informal review. HACSB will review, on a case-by-case basis any family hardships and determine if a family may receive any extension of assistance.

**APPENDIX F: SAMPLE COMMUNICATION TO RESIDENTS/PARTICIPANTS,  
LANDLORDS AND COMMUNITY (MTW FACT SHEETS)**

Comprehensive and accurate communication is critical to the success of our MTW participation. HACSB developed the following MTW Fact Sheets to inform residents, participants, landlords and the community of our new policies in a clear and concise manner.

# HACSB FACTSHEET

## Moving to Work | OVERVIEW

In March 2008, the Housing Authority of the County of San Bernardino (HACSB) became one of only one percent of housing authorities nationwide to be designated a Moving to Work (MTW) demonstration site by the U.S. Department of Housing and Urban Development (HUD).

As an MTW demonstration site, HACSB is able to transform its programs and services to empower families and individuals to achieve an enriched quality of life.

### WHAT IS MOVING TO WORK?

MTW is a demonstration program that allows housing authorities to design and test ways to: 1) promote self-sufficiency among assisted families; 2) achieve programmatic efficiency and reduce costs; and 3) increase housing choices for low-income households. As an MTW agency, HACSB will have the opportunity to implement new policies outside the usual scope of HUD policies and regulations.

### WHAT DOES THIS MEAN FOR THE HOUSING AUTHORITY?

As an MTW agency, the Housing Authority is given the flexibility and authority to develop policies outside the limitations of certain HUD regulations and provisions. This will allow HACSB to achieve its mission and program goals by leveraging the unique needs and concerns of the various communities and residents of San Bernardino County.

### WHAT ARE THE HOUSING AUTHORITY'S PRIMARY GOALS UNDER MTW?

- Operational efficiency
- Family self-sufficiency
- Expand housing opportunities

### WHAT DOES THIS MEAN FOR ME AS A...

- **Community partner:** The Housing Authority will work more closely with its community partners to provide services and programs that best reflect the needs and concerns of the San Bernardino County communities and residents.
- **Housing participant and resident:** Through MTW, new and existing housing participants and residents will be able to take advantage of an increase in housing choices and activities that will help them and their families achieve self-sufficiency.
- **Landlord partner:** The Housing Authority will work with new and existing landlord partners to provide high-quality living standards for all housing participants.



### WHAT'S NEXT?

The Housing Authority is transitioning to implement the various activities to achieve the goals listed above. Some activities are well underway, and others are still pending HUD approval. A complete list and details of the various activities can be found at [www.hacsb.com](http://www.hacsb.com).



### OUR MISSION

The Housing Authority of the County of San Bernardino empowers all individuals and families in need to achieve an enriched quality of life by providing housing opportunities and resources throughout San Bernardino County.

### OUR CORE VALUES

**Respect** | We believe that all people should have a stable and enriched quality of life and should be afforded the opportunity to not only survive, but to thrive in environments that are sensitive to and encourage respect and empathy for individual circumstances.

**Safety** | We believe that all residents deserve a safe and secure living environment that is crime and distraction free and where families can feel good about raising their children.

**Integrity** | We believe that there is a strong, mutually-reinforcing connection between the integrity of our staff/programs and the success of our clients. Integrity-building within our organization is key toward fulfilling our mission statement.

**Service** | We believe that in order to be successful we must serve the public by being effective stewards of its financial resources and by developing a customer service business model based on benchmarks and measurements.

# HACSB FACTSHEET

## Moving to Work | OVERVIEW

### HCV LANDLORDS

In March 2008, the Housing Authority of the County of San Bernardino (HACSB) became one of only one percent of housing authorities nationwide to be designated a Moving to Work (MTW) demonstration site by the U.S. Department of Housing and Urban Development (HUD).

MTW is a demonstration program that allows housing authorities to design and test ways to: 1) promote self-sufficiency among assisted families; 2) achieve programmatic efficiency and reduce costs; and 3) increase housing choices for low-income households. As an MTW agency, HACSB will have the opportunity to implement new policies outside the usual scope of HUD policies and regulations.

As an MTW demonstration site, HACSB is able to transform its programs and services to empower families and individuals to achieve an enriched quality of life.

What does this mean for Housing Choice Voucher (HCV) Landlords? The following changes will directly apply to HCV Landlords:

#### **CONTROLLED PROGRAM MOVES:**

- **New policy:** HACSB will limit *voluntary* program moves for HCV participants to once every two years, only at the time of annual recertification and upon verification from their land-



lord that they are a tenant in good standing. This policy limits the number of times a program participant can move and when the participant can move. There are certain exceptions: a unit is in foreclosure, a participant gets a job or attends school more than 20 miles from their current residence.

- **Previous policy:** Pursuant to HUD regulations, HCV participants can move at any time after the initial term of the lease and under certain circumstances during the initial term of the lease.

#### **LOCAL INSPECTION STANDARDS: \***

- **New policy:** HACSB will develop an A to F property rating system. This rating system will determine the frequency of inspections assigned to a property;



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**Integrity** | We believe that there is a strong, mutually-reinforcing connection between the integrity of our staff/programs and the success of our clients. Integrity-building within our organization is key toward fulfilling our mission statement.

**Service** | We believe that in order to be successful we must serve the public by being effective stewards of its financial resources and by developing a customer service business model based on benchmarks and measurements.

# HACSB FACTSHEET

## Moving to Work | OVERVIEW

### HCV PARTICIPANTS

In March 2008, the Housing Authority of the County of San Bernardino (HACSB) became one of only one percent of housing authorities nationwide to be designated a Moving to Work (MTW) demonstration site by the U.S. Department of Housing and Urban Development (HUD).

MTW is a demonstration program that allows housing authorities to design and test ways to: 1) promote self-sufficiency among assisted families; 2) achieve programmatic efficiency and reduce costs; and 3) increase housing choices for low-income households. As an MTW agency, HACSB will have the opportunity to implement new policies outside the usual scope of HUD policies and regulations.

As an MTW demonstration site, HACSB is able to transform its programs and services to empower families and individuals to achieve an enriched quality of life.

What does this mean for Housing Choice Voucher (HCV) program participants? The following are approved changes that will directly apply to participants:

#### **CONTROLLED PROGRAM MOVES:**

- **New policy:** HACSB will limit *voluntary* program moves for HCV participants to once every two years, only at the time of annual recertification and upon



verification from their current landlord that they are a tenant in good standing. This policy limits the number of times a program participant can move and when the participant can move. There are certain exceptions: a unit is in foreclosure, a participant has a job or attends school more than 20 miles from their current unit.

- **Previous policy:** Pursuant to HUD regulations, HCV participants can move at any time after the initial term of the lease and under certain circumstances during the initial term of the lease.

#### **LOCAL POLICIES FOR PORTABILITY:**

- **New policy:** All individuals moving into and out of HACSB's jurisdiction (the County of San Bernar-



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dino) will have to comply with the MTW policies and requirements. Applicants must lease up in HACSB's jurisdiction for at least two years before a request to move will be considered.

- **Previous policy:** HACSB voucher participants could move to any geographical jurisdiction where there is a housing agency that administers a Housing Choice Voucher Program.

#### **MINIMUM RENT:**

- **New policy:** HACSB has adopted a new minimum rent amount of \$125.00. Pursuant to HUD regulations, if 30% of the monthly adjusted household in-



come is less than the established minimum rent, the total tenant payment toward rent and utilities will be increased to \$125.00. A temporary waiver policy has been established for families who demonstrate a hardship in paying the increased required minimum amount. In order to qualify for a temporary waiver, the family's income must have decreased due to a no fault loss of employment or the death of a household member.

- **Previous policy:** The previous minimum rent amount was \$50.00.

#### **ELIMINATION OF MANDATORY EARNED INCOME DISALLOWANCE:**

- **New policy:** HACSB will eliminate the HUD Mandatory Earned Income Disallowance (EID) from the calculation of total tenant payment and replace it with the rent reform activities authorized under the MTW agreement. No additional families will be processed under the HUD EID requirements. Families currently receiving an earned income disregard will continue to receive such benefit as follows: 1) Until the naturally occurring expiration date under the EID provisions if such date is prior to September 1, 2011; or 2) For a maximum period of 24 months from August 31, 2009 if the current scheduled expiration date is later than September 1, 2011.

- **Previous policy:** In the previous policy, earned income may be disregarded in calculation of tenant rent for two 12-month exclusion periods with a lifetime limit of 48 months.

The Housing Authority is transitioning to implement the various activities to achieve the goals listed above. Some activities are well underway, and others are still pending HUD approval. A complete list and details of the various activities can be found at [www.hacsb.com](http://www.hacsb.com).



*As an MTW demonstration site, HACSB is able to transform its programs and services to empower families and individuals to achieve an enriched quality of life.*

only properties that receive an “A” will be entitled to inspections every two years, others may even be inspected up to twice a year. The Housing Authority will not renew the contracts with those property owners whose properties score a “D” or “F”. This activity will increase the quality housing choice options for low-income families, as well as reduce the administrative burden to both HACSB and landlords.

- **Previous policy:** In order to qualify, HCV rental properties must meet current HUD regulations for Housing Quality Standards (HQS).

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\*Pending HUD approval by September 30, 2009

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# HACSBFACTSHEET

## Program Moves | Overview

In March 2008, the Housing Authority of the County of San Bernardino (HACSB) became one of only 1% of housing authorities nationwide to be designated a Moving to Work (MTW) demonstration site by the U.S. Department of Housing and Urban Development (HUD).

MTW is a demonstration program that allows housing authorities to design and test ways to: 1) promote self-sufficiency among assisted families; 2) achieve programmatic efficiency and reduce costs; and 3) increase housing choices for low-income households. As an MTW agency, HACSB will have the opportunity to implement new policies outside the usual scope of HUD policies and regulations.

What does this mean for Housing Choice Voucher (HCV) program participants and landlords? Effective February 1, 2010, HACSB will require any HCV family that desires to move to complete a *Request to Move* form, which must be submitted to the family's Occupancy Technician along with a copy of the Notice to Vacate provided to their landlord. The Housing Authority will then schedule each family for a briefing to provide additional and key information

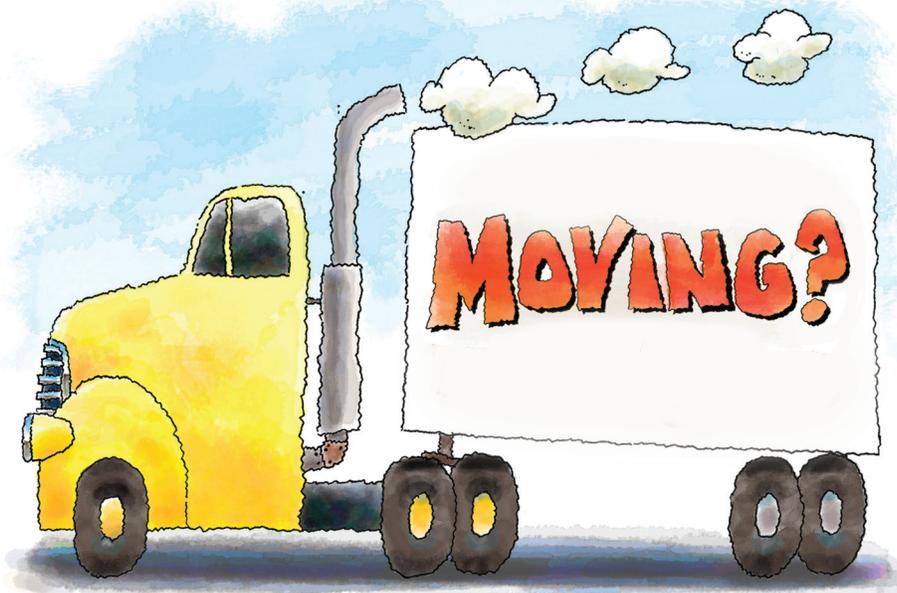
on the HCV program. Each family will be required to sign a new Voucher. After the family leases up at a new unit, they will be required to stay at that unit at least two years.

After the family signs the MTW Voucher this policy will limit *voluntary* program moves for HCV participants to once every two years. Such moves may be made only at the time of annual recertification and upon verification from their current landlord that they are a tenant in good standing. There are certain exceptions: a unit is in foreclosure, or a participant has a job or attends school more than 10 miles from their current unit. HACSB categorizes the types of moves in the following ways:

### **ELECTIVE MOVES:**

An elective move is a move in which the family chooses to locate to another housing unit and transfer their housing assistance to that unit. HACSB will approve elective moves only if the participant is meeting the following conditions:

- Has lived in the current unit for a minimum of two consecutive years;



- Is in compliance with all HACSB policies, and;
- Has notified the property owner of their intent to vacate the unit in accordance with the terms and conditions of the lease agreement and the property owner confirms that the participant has complied with all other terms and conditions of the lease agreement throughout the tenancy.

**PERMISSIBLE MOVES:**

A permissible move is a move that HACSB may approve regardless of recertification date or number of years in a unit. HACSB will approve permissible moves only if the following applies:

- The family was approved to relocate in accordance with HACSB’s procedures for the Violence Against Women Act (VAWA);
- The family has requested and documented the need for reasonable accommodations for a family member.

**MANDATORY MOVES:**

A mandatory move is a move in which the family must, in order to continue to receive housing assistance, locate another suitable housing unit that meets all program requirements. HACSB will approve mandatory moves only if:

- The unit failed inspection due to no fault of the participant;
- The Housing Assistance Payments (HAP) contract has been terminated due to a breach of the contract requirements by the owner;
- A transfer of ownership has occurred and the new owner is not approved for participation in the HCV program;
- Upon notification of any pending “foreclosure

action” and the foreclosing entity will not honor the HAP contract;

- Natural disasters that make the unit uninhabitable, including failure under the HACSB’s Housing Quality Inspection Standards;
- Change in household composition due to a birth, adoption or court ordered custody that results in the housing unit being overcrowded in accordance with HACSB subsidy standards, or;
- The family has been granted a hardship exemption due to a decrease in the payment standard.

**TIMING OF MOVES:**

Elective moves may occur only after the initial term of the HAP contract which has been extended to two years, and only at regularly scheduled annual recertifications. Mandatory and permissible moves will be processed immediately after documentation of the cause for the move has been received and approved by HACSB.

**INCOMING PORTABILITY:**

When HACSB is notified that a family desires to port into the jurisdiction, the Occupancy Technician must immediately contact the family and inform them of the Agency’s policies under the Moving to Work program. Each incoming portable family must meet the requirements implemented by HACSB regardless of whether the voucher is absorbed or administered.



# HACSB FACTSHEET

## Moving to Work | OVERVIEW

### PUBLIC HOUSING RESIDENTS

In March 2008, the Housing Authority of the County of San Bernardino (HACSB) became one of only one percent of housing authorities nationwide to be designated a Moving to Work (MTW) demonstration site by the U.S. Department of Housing and Urban Development (HUD).

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As an MTW demonstration site, HACSB is able to transform its programs and services to empower families and individuals to achieve an enriched quality of life.

What does this mean for public housing residents? The following are approved changes that will directly apply to residents:

#### MINIMUM RENT:

- **New policy:** HACSB has adopted a new minimum rent amount of \$125. Pursuant to HUD regulations, if 30 percent of the monthly adjusted household income is less than the established minimum rent, the total tenant payment toward rent and utilities will be increased to \$125. A temporary waiver policy has been established for families who demonstrate a hardship in paying the increased required minimum amount.

In order to qualify for a temporary waiver, the family's income must have decreased due to a no-fault loss of employment or the death of a household member.

- **Previous policy:** The previous minimum rent amount was \$50.

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The Housing Authority is transitioning to implement the various activities to achieve the goals listed above. Some activities are well underway, and others are still pending HUD approval. A complete list and details of the various activities can be found at [www.hacsb.com](http://www.hacsb.com).



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# HACSB FACTSHEET

## Energy Conservation Measures

### OVERALL

The Housing Authority is investing \$9 million from private funding in energy and water conservation measures at its various housing apartment complexes. This will help conserve the environment as natural resources continue to be depleted, and also help families and individuals save money.

The Housing Authority currently has 1,667 apartment units in San Bernardino County. More than 900 of these, throughout Barstow, Chino, Colton, Fontana, Redlands, and San Bernardino, are being upgraded to new energy-efficient water sub-metering, plumbing fixtures, thermostats, lighting, windows, and xeriscaping. Through the latest green technology, all the upgrades provide substantial water, energy, and cost saving immediately upon implementation for both the Housing Authority and its residents.

### COST SAVINGS

These energy conservation measures are projected to save more than \$800,000 each year, or approximately \$16 million over the 20-year term of the financing. Susan Benner, HACSB Executive Director, states: "Our primary objective for these upgrades was to transition our apartment complexes, the majority of which were built in the 1940s, to green technology, conserve natural resources, invest in the County's economy, and also help our residents save."



### SPECIFIC PROJECTS

- Toilets, shower heads and about 1,750 aerators are being replaced to save water.
- New energy-efficient water heaters are being installed.
- 880 thermostats are being replaced with a programmable model to better regulate room temperatures.
- Compact fluorescent bulbs are now being used to reduce the amount of electricity consumed.
- Interior lighting fixtures are also being upgraded to modern energy-conserving fixtures.
- Xeriscaping (landscaping with natural plants specific to the site environment) reduces watering required to keep the plants healthy.
- Sprinklers and drip lines for lawn areas are being installed to ensure proper watering for healthy lawns and plants.

### VALUE ADDED

As these upgrades take place, residents are also learning how to use water responsibly and conserve energy through regular on-site community training meetings. Residents have become mindful of their water consumption and attempt to keep it within reasonable limits. These upgrades are transforming entire households, and the Housing Authority hopes this will also influence others in the community.



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# HACSBFACTSHEET

## Pilot Work Requirement Overview

In March 2008, the Housing Authority of the County of San Bernardino (HACSB) became one of only 1% of housing authorities nationwide to be designated a Moving to Work (MTW) demonstration site by the U.S. Department of Housing and Urban Development (HUD).

MTW is a demonstration program that allows housing authorities to design and test ways to: 1) promote self-sufficiency among assisted families; 2) achieve programmatic efficiency and reduce costs; and 3) increase housing choices for low-income households.

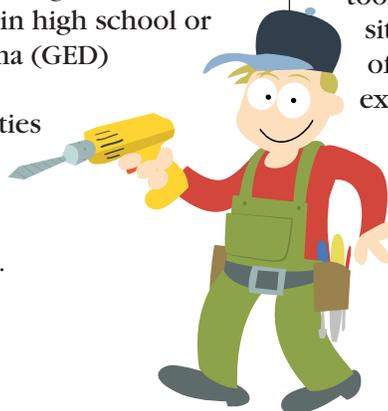
To help promote self-sufficiency among assisted families, HACSB will be implementing a pilot work requirement at the Medical Center housing community. Households will have a 6-month grace period to comply while they search for activities to fulfill this requirement.



All current and future adult household members between the ages of 18 and 61 will be required to participate in paid employment, educational and/or volunteer activities for a minimum of 15 hours per week. Elderly and disabled individuals and one adult in a household with children under the age of 6 will be exempt from this policy. Also, all children under the age of 18 must be enrolled in high school or

in a General Equivalency Diploma (GED) preparatory course.

The acceptable work activities are defined as employment, activities leading to gainful employment, and activities that remove barriers to employment.



Below are descriptions of what these activities mean for residents and examples:

**Employment** means regular paid employment at a rate greater than or equal to the California minimum wage.

**Activities leading to gainful employment** are activities like vocational training, apprenticeships, certifications, college, etc. that help the individual acquire the skills and training to obtain employment.

**Activities that remove barriers to employment** are activities like GED, volunteer work, skills training and drug and mental health treatments. Residents will be allowed to participate in such activities for a maximum of two years before they will be required to transition to paid employment or activities leading to gainful employment. The unit rent will be raised to the market rent for non compliant households.

The Housing Authority has partnered with various community organizations, local government agencies, businesses, and schools to provide the residents at Medical Center with the resources and tools necessary to fulfill this requirement. The on-site computer lab has also expanded the number of computers, increased broadband speeds, extended operating hours, and provides a range of online training workshops on Microsoft Office and internet use for residents. Residents are encouraged to reach out to their Resident Services Coordinator for more information about the resources available.

# HACSBFACTSHEET

## Redlands Public Housing Revitalization Project

In 1943, the Housing Authority built its first complex—the Redlands Public Housing site, which consisted of 50 units. In 1961 it was expanded by 65 additional units. Despite several upgrades throughout the years, the complex still has a number of infrastructural deficiencies.

On November 17, 2009, the Housing Authority plans to submit an application for Fiscal Year 2009 HOPE VI Revitalization Grant. Such monies would be used to demolish and revitalize the entire Redlands Public Housing site for an estimated cost of \$65 million. The proposed sources of funding, contingent upon grant and local approvals, include: HOPE VI Revitalization Grant (\$22 million); HUD Capital Fund Recovery Competition Grant (\$7 million); 4% and 9% Low Income Housing Tax Credit; City of Redlands—HOME Funds/Revitalization monies; and conventional funding.

### INCREASING THE HOUSING STOCK:

#### Current numbers:

- 115 Public Housing Units—for families with less

than 80% Area Median Income (AMI).

- Approximately 430 residents.

#### Post-Revitalization Numbers:

228 total units:

- 115 Public Housing Units—for families with less than 80% AMI.
- 39 Single Family Homes for Sale—for families with 80-120% AMI.
- 74 Low Income Housing Tax Credit Units—for families with 30-60% AMI.
- Approximately 940 residents.

#### GREEN BUILDING\*:

Green design features have been included in the site planning, architectural and engineering design, and material and equipment selection. The green plan is focused on:

- creating shades and shadows to eliminate heat transfer;
- incorporating the use of durable materials and design intended to minimize operating and maintenance costs, and;



- offering market-rate features, such as solar photovoltaic technology, reconfiguration of pedestrian and vehicular connectivity to the surrounding neighborhood, integration of water conservation techniques, incorporate passive solar heating and cooling systems, promote an enhanced local and regional ecosystem, and inclusion of materials that are beneficial to the environment.

**BENEFITS OF THE REVITALIZATION PROJECT:**

- Includes a new club house to provide self-sufficiency activities for the entire community;
- Promotes early childhood development through an on-site Head Start Preschool;
- Incorporates green features and technology;
- Maximizes 18.8 acres of land available to expand the number of housing units available;



- Creates a mixed-income housing community;
- Provides first-time homeownership opportunities;
- Serves as a catalyst for the North Redlands area that has been neglected for a number of years.

**PROJECT'S GUIDING PRINCIPLES:**

- One-to-one public housing unit replacement;
- Develop a livable, balanced mix of residential housing types— rental and for sale;
- Variety of unit size and scale;
- Diversity of income—very low, low, and moderate;
- Built in the style of the Redlands neighborhood tradition;
- High quality of living throughout (no disparity, grouping, or phasing by income);



- Durability of materials and design;
- Low operating and maintenance costs;
- Provide key resident amenities;
- Accessible active and passive recreation space;
- Create a community oriented design;
- Improve traffic management, accessibility, and integration with adjoining neighborhoods;
- Incorporate a Sustainable Green Development Plan and architectural design.

\*Complete list of specific green design features is available upon request.

