



# Moving to Work

# ANNUAL PLAN

Housing Authority of the County of San Bernardino

# 2015



*Building Communities  
Changing Lives*

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Response to HUD Comments #2 – Submitted 2/5/2015



## BOARD OF COMMISSIONERS

### Our Mission

HACSB 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 Vision

HACSB is committed to creating a world in which all people have a stable and enriched quality of life.

### 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.



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Housing Authority of the County of San Bernardino  
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**Daniel Nackerman**  
President/CEO



**Maria Razo-Dale**  
Executive Vice President/CFO



**Gustav Joslin**  
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**Ana Gamiz**  
Director of Policy  
and Community Affairs



**Lisa Jones**  
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**Marcia Waggoner**  
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Development Initiatives

**Not Pictured** - Jennifer Dawson – Director of Human Resources; Rishad Mitha – Director of Housing Communities; Steve Grimes – Director of Information Technology

## For More Information

Should you have any questions or need additional information, please contact Maria Razo-Dale at [mgrazo@hacsb.com](mailto:mgrazo@hacsb.com).

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# Section I: Introduction

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For over 70 years, the Housing Authority of the County of San Bernardino (HACSB) has been one of the leading providers of affordable housing in the County of San Bernardino. The County of San Bernardino is the largest county in the contiguous United States consisting of 24 cities: covering over 20,000<sup>1</sup> square miles of land. It is the twelfth largest county in the nation<sup>2</sup>, with more residents than 15 of the country's states. The population of San Bernardino County has grown by almost five percent between 2010 and 2013 and is expected to continue to rise over the next several years. HACSB proudly serves in excess of 30,000 people, most of whom are seniors, disabled individuals and children.

Our agency's success is a result of our business approach to strategic planning and delivery of - services. We strive to design our program as a stepping stone providing additional assistance to our families on their path to economic independence. In conjunction with an extensive list of community partners, government agencies, employment service providers, and institutions of higher education we work to: -provide family/individual case management and counseling, assist with career training and job placement; and ensure program integrity. These efforts are building blocks to achieve our mission and vision upholding our core values of respect, safety, integrity and service.

***HACSB Mission Statement*** - Empower all individuals and families in need, to achieve an enriched quality of life by providing housing opportunities and resources throughout San Bernardino County.

***HACSB Vision*** – HACSB is committed to creating a world in which all people have a stable and enriched quality of life.

***HACSB Values*** - HACSB strives to be a key participant in supporting and improving the community it serves. HACSB seeks to streamline its programs and establish a higher standard of services to the community. Our core values of respect, safety, integrity and service will guide us in accomplishing our Mission and Vision.

## What is in this plan?

The Fiscal Year 2015 Moving to Work Annual Plan complies with a format required by the U.S. Department of Housing and Urban Development (HUD) that is outlined in the 2008 Amended and Restated Moving to Work (MTW) Agreement between HUD and HACSB, and also complies with the new requirements set forth by HUD in Form 50900. For this year's plan, per the "Frequently Asked Questions about HUD Form 50900: Elements for the Annual MTW Plan and

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<sup>1</sup> San Bernardino County 2013 Community Indicators Report

<sup>2</sup> Census Population Estimates 2013

Annual MTW Report, September 17, 2013,” if the agency’s first required document in the new format is the Plan, the agency will list the standard metrics and report on their outcomes in the same year’s Report.

This Plan is separated into the following sections:

*Section I: Introduction* provides an overview of the layout of the document and HACSB’s short term and long term goals.

*Section II: General Housing Authority Operating Information* provides an overview of the agency’s housing portfolio, leasing rates, and waiting list information.

*Section III: Proposed MTW Activities* describes the new MTW activities that the agency plans to pursue in FY 2015, including evaluation criteria and waiver citations that provide the agency with the authority to undertake the new activities.

*Section IV: Ongoing MTW Activities* provides information on previously approved uses of MTW authority.

*Section V: Sources and Uses of Funding* describes the agency’s projected revenues and expenditures for FY 2015, local asset management program and use of MTW Block Grant fungibility.

*Section VI: Administrative Information* provides administrative information required by HUD.

## **What is “Moving to Work”?**

Moving to Work (MTW) is a U.S. Department of Housing and Urban Development (HUD) demonstration for housing authorities to design and test innovative, locally designed housing and self-sufficiency initiatives. The MTW designation allows participating agencies to waive certain statutes and HUD regulations in order to increase housing choice for low-income families, encourage households to increase their self-sufficiency, and improve administrative and operational cost effectiveness. HACSB’s participation in MTW allows the agency to test new methods to improve housing services and to better meet local needs.

As a high performing, innovative and progressive agency, HACSB was designated as a Moving to Work (MTW) Agency by HUD in 2008. HACSB has completed its sixth year of participation during which we have developed 24 MTW initiatives.

A brief timeline of our MTW Plans and Reports is provided below –

MTW Plan	Approved by HUD	MTW Report	Accepted by HUD
FY 2009 MTW Annual Plan  Amendment 1	September 25, 2008  June 29, 2009		
FY 2010 MTW Annual Plan  Amendment 1  Amendment 2  Amendment 3	September 30, 2009  November 18, 2009  February 22, 2010  September 15, 2010	FY 2009 MTW Annual Report	April 22, 2010
FY 2011 MTW Annual Plan	October 18, 2010	FY 2010 MTW Annual Report	March 21, 2011
FY 2012 MTW Annual Plan  Amendment 1	October 5, 2011  November 4, 2011	FY 2011 MTW Annual Report	March 20, 2012
FY 2013 MTW Annual Plan	September 27, 2012	FY 2012 MTW Annual Report	July 19, 2013
FY 2014 MTW Annual Plan	May 14, 2014	FY 2013 MTW Annual Report	Pending HUD review/approval
FY 2015 MTW Annual Plan	Pending HUD review/approval		

## Overview of Agency's Goals and Objectives

### Long-Term Goals

Prior to our MTW designation in early 2008, HACSB completed a 30 year strategic planning process and developed the agency's long term goals that provide us with the vision to achieve the short term milestones. These goals serve as a guiding map to help us achieve our mission and vision. Strategy leaders update the annual accomplishments and milestones marking the progress towards the 30 year strategic goals.

Our strategic 30 years goals are -

HACSB 30 Year Strategic Goals	
<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

Our MTW designation assists in our efforts to achieve our long term goals and the statutory objectives align with our long term vision. HACSB currently has 22 approved MTW activities with two activities pending HUD approval: twelve address the objective of operational efficiency, nine assist families with their economic independence efforts and three help expand housing opportunities. As good stewards of taxpayers’ dollars, we ensure optimal use of funds to provide the best quality services to our families; and HACSB continually seeks to implement innovative solutions that streamline processes, increase efficiency and help families achieve economic independence. Proactive planning has helped us face the consecutive budget reductions while increasing the number of families served and services provided.

### Short Term Goals

Our long term goals align with the statutory objectives of MTW and our vision of creating a world in which all people have a stable and enriched quality of life. We accomplish MTW objectives by aligning our agency’s strategic goals with our MTW goals/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

In addition to implementing non-MTW activities to address this goal, we have currently implemented twelve MTW activities that address this goal (listed under the administrative efficiency statutory objective on the following table).
- **Goal 2 – Develop economically independent clients** – *Facilitating opportunities for families and individuals to become self-sufficient and financially independent to transition from dependency on housing subsidy through the following objectives:*
  -  Develop and maintain policies programs, and services that foster accountability, responsibility and self-sufficiency
  -  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 rentals

In addition to implementing non-MTW activities to address this goal, we have currently implemented seven MTW activities that address this goal (listed under the economic independence statutory objective on the following table).

- **Goal 3 – Ensure freedom of housing choice – 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

 Expand and improve HACSB’s housing stock

In addition to implementing the above non-MTW activities to address this goal, we have currently implemented three MTW activities that address this goal (listed under the expanding housing opportunities statutory objective on the following table).

The table below shows a current list of activities that were approved in our MTW Annual Plans .

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR	STATUS
Activity 1	Single Fund Budget	Cost Effectiveness	FY 2009	Implemented
Activity 2	Strategic Investment Policies	Cost Effectiveness	FY 2009	Implemented
Activity 3	Alternate Assessment Program	Cost Effectiveness	FY 2009	On Hold
Activity 4	Biennial Recertifications	Cost Effectiveness	FY 2009	Implemented
Activity 5	Local Verification Policies	Cost Effectiveness	FY 2009	Implemented
Activity 6	Elimination of Assets	Cost Effectiveness	FY 2009	Implemented
Activity 7	Controlled Program Moves	Cost Effectiveness	FY 2009	Implemented
Activity 8	Local Policies for Portability	Self-Sufficiency	FY 2009	Implemented
Activity 9	Elimination of Earned Income Disallowance	Self-Sufficiency	FY 2009	Implemented
Activity 10	Minimum Rent	Self-Sufficiency	FY 2009	Implemented
Activity 11	Local Project-Based Voucher Program	Housing Choice	FY 2009	Implemented
Activity 12	Local Payment Standards	Housing Choice	FY 2009	Implemented
Activity 13	Local Inspection Standards	Cost Effectiveness	FY 2010	Implemented
Activity 14	Local Asset Management Program	Cost Effectiveness	FY 2010	Implemented
Activity 15	Pilot Work Requirement	Self-Sufficiency	FY 2010	Implemented
Activity 16	Operating Subsidy for Vista del Sol	Housing Choice	FY 2010	Closed Out
Activity 17	Local Income Inclusion	Self-Sufficiency	FY 2011	Implemented
Activity 18	Property Management Innovation	Cost Effectiveness	FY 2011	Implemented
Activity 19	Local FSS program	Self-Sufficiency	FY 2011	Implemented
Activity 20	Five Year Lease Assistance Program	Self-Sufficiency	FY 2011	Implemented
Activity 21	Utility Allowance Reform	Cost Effectiveness	FY 2012	Closed Out
Activity 22	Streamlined Lease Assistance Program	Cost Effectiveness	FY 2013	Not Yet Implemented
Activity 23	No Child Left Unsheltered	Self-Sufficiency	FY 2014	Not Yet Implemented
Activity 24	Transition for Over-Income Families	Self-Sufficiency	FY 2014	Not Yet Implemented

## Accomplishments

HACSB has continued to develop, improve and revise MTW activities to increase administrative efficiencies, develop economically self-sufficient families, and housing options for our families. Despite continued budget reductions within this past fiscal year, HACSB has made progress in the development and/or implementation of the following most recent MTW activities:

-  Activity 15 – Pilot Work Requirement
-  Activity 20 – Five Year Lease Assistance Program
-  Activity 22 – Streamlined Lease Assistance Program
-  Activity 23 – No Child Left Unsheltered
-  Activity 24 – Transition for Over-Income Families

HACSB has made progress toward our long-term strategic goals in the following ways:

-  Partnered with Loma Linda University to perform needs assessment studies to identify client barriers to success and provide services to overcome those barriers.
-  Partnered with Technical Employment and Training and developed and implemented a Deconstruction Training Program to utilize revitalization projects for hands-on training and material recycling. The initial deconstruction training was expanded to include broader construction skills training, landscape irrigation and maintenance, and hydroponics, which culminated in the completion of the first community garden at the Maplewood Homes site in March, 2014.
-  Submitted applications with the U.S. Department of Housing and Urban Development (HUD) for the Rental Assistance Demonstration Program to convert the public housing subsidies into a long-term, Project-Based Section 8 rental assistance subsidy. The first application, for conversion of our Waterman Gardens 252 unit public housing site was awarded in December 2013. The remaining portfolio application is in 4<sup>th</sup> position. If awarded, the subsidy change will provide stable and predictable revenues which will allow HACSB to apply for Low-Income Housing Tax Credits and other sources of financing to fund public housing renovations.
-  MTW Activity 15, Pilot Work Requirement, was implemented on January 1, 2013.
-  Upon joining and reaching their first year of participation in the Five Year Lease Assistance Program, participants in the program met with HACSB staff to review individual goals and were connected with resources to help them accomplish their economic independence goals.
-  Continued to expand our affiliate social services non-profit KEYS to provide case management and supportive services. As a non-profit, KEYS has the ability to apply for a wider range of funding sources including foundations. In 2013, KEYS was awarded the Supportive Services for Veterans Families grant in the amount of \$600,000 to provide supportive services including finding housing, rental assistance, security deposits and transportation. KEYS will partner with the HACSB and Community Action Partnership of San Bernardino for full service implementation.



HACSB has continued revitalization of the Redlands/Lugonia Affordable Housing site. In 2014 we are continuing construction of phase 1 of the Redlands-Lugonia site (AMP 150, sites 01, 8 & 9), wherein 115 existing public housing units will ultimately be replaced with 189 mixed-income rental units and 39 single family homes for first-time homebuyers. Phase I consists of 85 units of affordable rental housing funded with 4% Low-Income Housing Tax Credits and Tax-exempt Bonds. Approximately 60 families relocated from the original units will have first right to return to the site once completed. We anticipate occupying the first 85 units (w/ project-based vouchers) and also relocating approximately 30 families who remain in the phase 2 portion of the site in early 2015, concurrent with phase 1 construction completion.

Serving the needs of our residents and helping them on their path to economic independence is a priority at HACSB. The administrative efficiencies from our activities helped create the Community Development Initiatives (CDI) Department that works closely with our families to further our strategic goal of transforming clients' mindsets from entitlement to empowerment. We have also repositioned assets and implemented innovative activities to create quality housing choices for our families. We are pleased with our progress and continue to strive to achieve our 30 year goals.

We are confident that through our combined efforts and through long term strategic planning, we will reach our mission of empowering all individuals and families in need, to achieve an enriched quality of life by providing housing opportunities and resources throughout the County of San Bernardino.

# Section II: General Operating Information

This section provides an overview of the Housing Authority of the County of San Bernardino’s (HACSB) housing portfolio, leasing, and waiting list information.

## MISSION STATEMENT

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

## AGENCY OVERVIEW

HACSB provides affordable housing assistance to over 10,000 families throughout the County of San Bernardino consisting of the Affordable (Public) Housing Program, the MTW Voucher Program, and Special Programs such as Shelter Plus Care, Veterans Administration Supportive Housing (VASH) Vouchers, Mainstream and also through our Authority Owned Portfolio. We provide families a stepping stone through difficult economic times and in conjunction with community partners, assist them on their path to economic independence.

### A. MTW PLAN: HOUSING STOCK INFORMATION (Units funded with the MTW Block Grant)

The majority of the agency’s funding from HUD comes in the form of a block grant that combines the Public Housing operating fund, Public Housing capital fund, and MTW Housing Choice Voucher funding into one funding source for HACSB to pursue its mission, vision and 30 year strategic plan.

#### *Planned New Public Housing Units to be Added During the Fiscal Year*

HACSB does not anticipate adding new public housing units in 2015.

Planned New Public Housing Units to be Added During the Fiscal Year												
AMP Name and Number	Bedroom Size							Total Units	Population Type *	# of UFAS Units		
	0	1	2	3	4	5	6+			Fully Accessible	Adaptable	
PIC Dev. # /AMP PIC Dev. Name	0	0	0	0	0	0	0	0	N/A	0	0	
PIC Dev. # /AMP PIC Dev. Name	0	0	0	0	0	0	0	0	N/A	0	0	
PIC Dev. # /AMP PIC Dev. Name	0	0	0	0	0	0	0	0	N/A	0	0	
PIC Dev. # /AMP PIC Dev. Name	0	0	0	0	0	0	0	0	N/A	0	0	
<b>Total Public Housing Units to be Added</b>								<b>0</b>				
* Select Population Type from: Elderly, Disabled, General, Elderly/Disabled, Other												
If Other, please describe: N/A												

### Planned Public Housing Units to be Removed During the Fiscal Year

HACSB has received approval under HUD’s Rental Assistance Demonstration (RAD) program to convert 252 units at its Waterman Gardens public housing site (AMP 120). RAD applications are also pending for the rest of the public housing portfolio. The chart below indicates the planned units to be removed during 2015.

Planned Public Housing Units to be Removed During the Fiscal Year		
PIC Dev. # / AMP and PIC Dev. Name	Number of Units to be Removed	Explanation for Removal
CA019000120 Waterman Gardens	349	RAD Applications for entire AMP (252 WG, 97 scattered sites)
CA019000130 Wilson Street	330	RAD Applications for entire AMP
CA019000150 Scattered Sites	87	RAD Applications for entire AMP
CA019000160 Scattered Sites	175	RAD Applications for entire AMP
CA019000170 Bighorn Complex	218	RAD Applications for entire AMP
<b>Total Number of Units to be Removed</b>	<b>1159</b>	

### New Housing Choice Vouchers to be Project-Based During the Fiscal Year

In FY 2015, HACSB anticipates awarding 201 project based vouchers for developments owned by HACSB, our affiliate non-profit, Housing Partners I, Inc., and in cooperation with other local developers. The table below contains more information on planned project based vouchers.

New Housing Choice Vouchers to be Project-Based During the Fiscal Year		
Property Name	Anticipated Number of New Vouchers to be Project-Based *	Description of Project
Bloomington Family Community	11	Family Community, New Development
Meadowbrook Park, San Bernardino	47	Senior Community, Rehabilitated Development
Horizons, Yucaipa	50	Senior Community, New Development
Valencia Grove, Redlands	85	PBV as replacement for PH disposition for mixed family and senior units
Re-Entry Housing, San Bernardino	8	Senior Community, New Development
<b>Anticipated Total New Vouchers to be Project-Based</b>	<b>201</b>	Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year
		<b>1,170</b>
		Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year
		<b>1,170</b>

\*New refers to tenant-based vouchers that are being project-based for the first time. The count should only include agreements in which a HAP agreement will be in place by the end of the year.

### ***Bloomington Family Community***

A partnership agreement was established with the Related Companies and our affiliate nonprofit HPI, Inc. for the development of a 106 unit multi-generational (70 senior, 36 family units) affordable housing complex in Bloomington, CA. HACSB has committed to providing 11 project-based vouchers to the development. It is anticipated that the partnership will apply for tax credits on July 1, 2014 with construction targeted to commence in early 2015.

### ***Meadowbrook Park –San Bernardino***

We also anticipate project basing 47 units in early 2015 at Meadowbrook Park Senior Apartments in San Bernardino, CA wherein our affiliate nonprofit, HPI Inc. is partnering with the nonprofit Housing Preservation, Inc. for the preservation and rehabilitation of an existing HUD subsidized affordable housing complex. The community consists of 95 existing studio units that will be reconfigured to create 47 one bedroom units in order to stabilize occupancy at the troubled site which also contains 120 family units. Extensive rehabilitation work is expected to be completed in early 2015 at the complex to address the significant (deferred maintenance) needs there.

### ***Horizons – Yucaipa***

A partnership agreement was established with Urban Housing Communities (UHC) and our affiliate nonprofit HPI, Inc. to serve as a General Partner in a new 50 unit affordable senior community in the city of Yucaipa. HACSB acquired the land on which this project will be built, and has committed to providing 50 Project Based Vouchers. It is anticipated that the partnership will apply for tax credits in mid-2014 to allow construction to commence in 2015.

### ***Valencia Grove – Redlands***

Lugonia Avenue Apartments (now called Valencia Grove) is the first phase of the redevelopment/replacement of low income HUD assisted affordable (public) housing built in 1942. The 115 units are being replaced with 189 affordable rental housing units and will target and prioritize current resident households with incomes ranging up to 60 percent of AMI. The project will include thirteen (13) two-story buildings, complete with garages on the first floor. The completed project will consist of 4 one bedroom / one bath units with 878 square feet, 11 two bedroom/one bath units with 878 square feet, 16 two bedroom/one and one half bath units with 1,089 square feet, 32 three bedroom/two bath units with 1,163 square feet, and 21 four bedroom/two bath units with 1,358 square feet. We anticipate to complete and project base the first 85 units (phase 1) in FY 2015.

### ***Re-Entry Housing – San Bernardino***

HACSB is participating in an innovative program wherein individuals transitioning from incarceration are housed and provided “wrap-around” supportive services and employment training in order to eliminate recidivism and insure successful transition back into society for the participants. HACSB is responsible for master-leasing and managing the physical housing site in the City of San Bernardino, wherein 50 participants will reside. HACSB will utilize voucher subsidy as necessary to support and expand this program.

## *Other Anticipated Changes to the Housing Stock for the Fiscal Year*

HACSB does not anticipate any other changes to the Housing Stock during the Fiscal Year.

Other Changes to the Housing Stock Anticipated During the Fiscal Year
No other changes are anticipated to the housing stock during the fiscal year.

Examples of the types of other changes can include but are not limited to units that are held off-line due to the relocation of residents, units that are off-line due to substantial rehabilitation and potential plans for acquiring units.

## *General Description of All Planned Capital Fund Expenditures during the Plan Year*

Due to years of declining funding of the Affordable (Public) Housing Program, short on capital grant funds and severely under funded with operating subsidies, we have been unable to adequately address the physical and management conditions at some of our communities. The demolition or disposition of such properties has allowed us the opportunity to replace existing and inadequate public housing subsidies with project based voucher subsidies for the residents on the sites, along with the ability, under the ownership of our affiliate nonprofit, to leverage the unit's equity to secure private funding and conventional loans for modernization. While we have successfully funded one development in this manner (Redlands-Lugonia AMP 150, sites 01,8 & 9), HUD has shifted priority from disposition to the Rental Assistance Demonstration (RAD) Program, wherein existing public housing subsidies are converted to rental assistance (vouchers). We therefore are aggressively pursuing this strategy for future rehabilitation of our Affordable (public) housing portfolio for the benefit of our current residents and the community at large.

In 2014 we continued construction of phase 1 of the Redlands-Lugonia site (AMP 150, sites 01, 8 & 9), wherein 115 existing public housing units will ultimately be replaced with 189 mixed-income rental units and 39 single family homes for first-time homebuyers. Phase I consists of 85 units of affordable rental housing funded with 4% Low-Income Housing Tax Credits and Tax-exempt Bonds. Approximately 60 families relocated from the original units will have first right to return to the site once completed. We anticipate occupying the first 85 units (w/ project-based vouchers) and also relocating approximately 30 families who remain in the phase 2 portion of the site in early 2015, concurrent with phase 1 construction completion.

HACSB expects approval of the public housing portfolio RAD application(s) before the end of 2014, which means that rehabilitation work at the initial sites should commence in 2015. The initial sites include 97 scattered site units in AMP 120; 330 units in AMP 130 (Maplewood Homes); 75 units in AMP 150 (Brockton site 19-05); and 50 units in AMP 160 (Monte Vista site 19-06). We will commence the necessary activities, including RAD Physical Needs Assessments,

financing and associated architectural/engineering work immediately upon HUD notification to insure timely implementation in 2015.

In 2015 we expect to commence construction activities of the initial phase of the redevelopment of the 252 unit Waterman Gardens site in San Bernardino (AMP 120- site19-02). The new development will include over 400 mixed-income housing units, including senior and homeownership units and extensive community facilities for recreation as well as employment and training opportunities supporting HACSB's MTW initiatives. Housing affordability will continue to be the primary focus for the development as well as revitalization of the broader neighborhood, as evidenced by our initial RAD application (approved by HUD in December 2013) which supports the development of an additional 150 units on adjacent sites. HACSB and its developer partner plan a mix of ACC/RAD and project-based voucher units with substantial funding secured through Low Income Housing Tax Credits. The existing 252 ACC units will be replaced on a one-for-one basis (transitioned to RAD project-based vouchers) over the course of the multiple-phase redevelopment.

**FY 2015:**

The Capital Fund Program 5 Year Plan and Budget is included as part of Appendix C. The Agency will continue its capital improvements agency-wide to include interior kitchen and bathroom renovations, Section 504 unit accessibility, exterior xeriscaping, and unit reconfiguration to split single 5 bedroom units, to two (2) smaller bedroom sizes to meet the much larger demand for smaller units. HACSB will also continue to implement additional energy improvements agency-wide to augment work completed previously under an Energy Performance contract.

The most significant capital expenditures planned for 2015 using Capital Funds, other than that mentioned above, includes ongoing architectural and engineering work associated with the initial construction phases of the Waterman Gardens redevelopment project. The RAD application for the project, which was approved by HUD in December 2013, proposed the acquisition of an adjacent parcel of land on which a 75 unit affordable housing development is proposed to be built, wherein residents of the initial phase who wish to remain in the neighborhood can be relocated. Low Income Housing tax credits applied for on July 1 of 2014 are expected to allow construction of that development to commence in early 2015.

HACSB will continue to aggressively implement resident employment programs under Section 3 as directly supportive of the variety of Moving-To-Work initiatives described in this plan. Capital Fund will continue to be utilized (and leveraged with outside funding) for employment training anchored within the large public housing revitalization projects already underway (Redlands-Lugonia and Waterman Gardens). These programs will continue to place a priority on training centered around sustainable development and green building practices, including deconstruction and recycling/reuse activities associated with the demolition of existing housing units, property management and maintenance of the newly constructed rental housing, and community gardening. The efforts are intended to also extend into the neighborhoods surrounding the existing public site(s) to promote community-wide revitalization.

## B. MTW PLAN: LEASING INFORMATION

### *Planned Number of Households Served at the End of the Fiscal Year*

In 2015, HACSB anticipates continued strong rates of leasing for both public housing and vouchers. The following table represents projected average utilization for vouchers and occupancy for the public housing units.

HACSB does not have any local non-traditional MTW funded programs.

Planned Number of Households Served at the End of the Fiscal Year		
MTW Households to be Served Through:	Planned Number of Households to be Served*	Planned Number of Unit Months Occupied/Leased***
Federal MTW Public Housing Units to be Leased	1,165	13,980
Federal MTW Voucher (HCV) Units to be Utilized	8,104	97,248
Number of Units to be Occupied/Leased through Local, Non-Traditional, MTW Funded, Property-Based Assistance Programs **	-	-
Number of Units to be Occupied/Leased through Local, Non-Traditional, MTW Funded, Tenant-Based Assistance Programs **	-	-
<b>Total Households Projected to be Served</b>	<b>9,269</b>	<b>111,228</b>
* Calculated by dividing the planned number of unit months occupied/leased by 12.		
** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households to be served, the PHA should estimate the number of households to be served.		
*** Unit Months Occupied/Leased is the total number of months the PHA has leased/occupied units, according to unit category during the fiscal year.		

### *Reporting Compliance with Statutory MTW Requirements*

HACSB is currently in compliance with the Statutory MTW Requirements as per the executed Moving to Work Agreement.

Reporting Compliance with Statutory MTW Requirements
<p>If the PHA has been out of compliance with any of the required statutory MTW requirements listed in Section II(C) of the Standard MTW Agreement, the PHA will provide a narrative discussion and a plan as to how it will return to compliance. If the PHA is currently in compliance, no discussion or reporting is necessary.</p>
<p>PHA is currently in compliance.</p>

***Description of any Anticipated Issues Related to Leasing of Public Housing, Housing Choice Vouchers and/or Local, Non-Traditional Units and Possible Solutions***

HACSB does not anticipate leasing difficulties for its public housing or voucher programs.

Description of any Anticipated Issues Related to Leasing of Public Housing, Housing Choice Vouchers and/or Local, Non-Traditional Units and Possible Solutions	
Housing Program	Description of Anticipated Leasing Issues and Possible Solutions
Public Housing	No leasing issues anticipated.
Housing Choice Voucher	No leasing issues anticipated.

**C. MTW PLAN: WAIT LIST INFORMATION**

***Wait List Information Projected for the Beginning of the Fiscal Year***

HACSB’s waiting list strategies vary to match the needs of different communities and housing programs. Applicants may be, and often are, on multiple waiting lists at the same time.

***Housing Choice Vouchers***

The agency maintains a single tenant-based waiting list, which has been closed since the 2007 lottery, but is projected to reopen in 2015. Project –based voucher properties operate their own site-specific waiting lists. As of the beginning of FY 2015, HACSB anticipates 4,003 households will be on the HCV tenant based waiting list that was established in 2007. We plan to begin pulling from this list in the summer of 2014.

***Public Housing***

Site specific waiting lists are offered by bedroom size for all of HACSB’s public housing communities. All waiting lists under this program are maintained centrally, to maximize efficiencies and housing choice.

As in prior years, HACSB anticipates that community need for affordable housing will remain high in 2015. The table below shows the projected number of households on waiting lists for public housing units and vouchers as of the beginning of FY 2015.

If HACSB’s application for RAD conversion of its entire portfolio is approved, applications currently on the waiting list for Public Housing will be moved to HACSB’s existing PBV waiting list. These applications will retain their original date and time of application and will be subject to the existing preferences for the PBV waiting list. Applicants will be notified of the change and offered the opportunity to opt out of placement on the PBV waiting list.

**Wait List Information Projected for the Beginning of the Fiscal Year**

Housing Program(s) *	Wait List Type**	Number of Households on Wait List	Wait List Open, Partially Open or Closed***	Are There Plans to Open the Wait List During the Fiscal Year
Public Housing	Other	14,333	Partially Open	Yes, by bedroom size as needed
Housing Choice Voucher- Project Based	Other	9,755	Partially Open	Yes, by bedroom size as needed
Housing Choice Voucher	Community Wide	4,003	Closed	Yes
Public Housing	Program-Specific		Open	Yes

Rows for additional waiting lists may be added, if needed.

\* Select Housing Program : Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

\*\* Select Wait List Types : Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).

\*\*\* For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open.

Public Housing: families and seniors by site, by specific bedroom sizes
Project Based Voucher: families and seniors, by site/region by specific bedroom sizes

If Local, Non-Traditional Housing Program, please describe:

N/A
N/A
N/A

If Other Wait List Type, please describe:

Public Housing: centrally managed, site-specific, by bedroom size
Housing Choice Voucher Project-Based: centrally managed, site/region specific, by bedroom size

If there are any changes to the organizational structure of the wait list or policy changes regarding the wait list, provide a narrative detailing these changes.

For Public Housing and for Housing Choice Voucher, only in relation to Acitivity 23- No Child Left Unsheltered. An additional preference for homeless families with children has been added to the Public Housing waiting list. A separate waiting list will be formed for the HCV component. The waiting list for the HCV component has not yet been formed.

## Section III: Proposed MTW Activities

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This section provides information detailing proposed new uses of MTW authority, including evaluation criteria and specific waivers to be used.

HACSB is not proposing any new MTW activities at this time.

# Section IV: Approved MTW Activities

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This section provides HUD-required information detailing previously approved uses of MTW authority. In the following pages, we provide a list of ongoing MTW activities that have been previously approved, with an update on any changes anticipated for 2015. To reflect the guidance recently issued by HUD in the revised Form 50900, activities are organized in separate sections based on whether they are active, not yet implemented, or closed out.

## A. Implemented Activities

### Activity 1: Single Fund Budget

Please refer to Section V.

### Activity 2: Strategic Investment Policies

This activity was approved in our FY 2009 Initial MTW Annual Plan and was implemented in November 2010.

#### 1. Activity Description

HACSB has adopted 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. This activity enables the Housing 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.

#### 2. Activity Status

HACSB has developed an investment policy for MTW funds which will be consistent with California Government Code Section 53630 and/or HUD approved investment criteria. Due to the implementation of the U.S. Department of Housing and Urban Development's cash management provisions, existing PHA held NRA balances will be transitioned to HUD-held program reserves in CY 2014. This will occur via either their use in lieu of HUD disbursing new budget authority or by direct return to HUD from PHA's. As a result, we will have limited funds for investment. Any remaining funds will be invested in liquid investments to ensure that they are readily available if needed.

#### 3. Proposed Modifications

There are no significant or non-significant changes proposed to this activity in FY 2015.

#### 4. Measurement Revisions

As a result of the new cash management requirements described in Notice PIH 2011-67, HACSB reserves are held by HUD. Because HACSB does not hold sufficient reserves to invest, the expected amount leveraged after implementation of the activity is \$0. This outcome is reflected in Standard Metric CE #4.

## 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

## 6. Statutory Objective

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

<i>CE #4: Increase in Resources Leveraged</i> <i>Activity 2: Strategic Investment Policies</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).	Actual amount leveraged after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Amount of funds leveraged in dollars.	The amount of funds leveraged prior to implementation of the activity is \$0.	The expected amount of funds leveraged after implementation of the activity is \$0.	The actual amount of funds leveraged after implementation of the activity is \$0.	Yes, the outcome meets the benchmark for this metric.

## Activity 4: Biennial Recertifications

This activity was initially approved in our FY 2009 MTW Annual Plan for the Public Housing and Housing Choice Voucher elderly and disabled households with no other adult members and no earned income and was modified in the FY 2012 MTW Annual Plan to expand the scope of activity to all families in both programs.

### 1. Activity Description

Current regulation requires annual recertifications for participants of the Public Housing and Housing Choice Voucher programs. This activity allows HACSB to conduct recertifications of households biennially for all households in both Public Housing and in Housing Choice Voucher programs. The expanded initiative was implemented in 2012 with approximately half the households assigned to a biennial schedule. The second half of the population was assigned to the biennial schedule in 2013.

### 2. Activity Status

The first complete cycle of biennial certifications was completed in 2014. The information reported for this activity represents fiscal year 2013-2014..

### 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

#### 4. Measurement Revisions

We have added Standard Metric CE1: Agency Cost Saving to measure resource and material cost savings associated with this activity. The baseline cost for this activity will be determined using the total staff hours set forth in the baseline for Standard Metric CE2: Total Staff Time Savings (9,846) times the average cost per staff hour plus additional hard costs of mailing.

#### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

#### 6. Statutory Objective

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

<i>CE #1: Agency Cost Savings Activity 4: Biennial Recertifications</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total Cost of Annual Reertifications (Both Public Housing and Housing Choice Voucher)	\$505,148 =\$488,138 per year staff cost + \$17,010 Postage Cost 9,000 recertifications * 1.62 per hour = 14,580 hours *33.48 =	\$263,363 =\$254,858 per year staff cost + \$8,505 Postage Costs Est. 4500 recertifications per year *1.62 hours per = 7,290 hours *34.96 per hour	\$125,024 =\$ 116,193 per year staff cost + \$8,831 Postage Costs 4748 recertifications x .7 hour per cert = 3,324 hours	Yes, outcome meets and exceeds the benchmark

<b>CE #2: Staff Time Savings</b>				
<b>Activity 4: Biennial Recertifications</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff hours to conduct recertifications	12,376 hours 306 hours for Public Housing; 2,224 hours for HCV in FY 2009. (0.85 hours to complete recertification)  1,393 hours for Public Housing; 8,453 hours for HCV in FY 2009 (1.62 hours per recertification)	6,199 hours 153 hours to complete recertifications in PH; 1,122 hours for HCV. The benchmarks will be the same for all forthcoming years. 697 hours to complete recertifications in PH; 4,227 hours for HCV. The benchmarks will be the same for all forthcoming years.	3,237 hours 93 Hours PH 766 Hours HCV (160 PH Recerts*.58 hours) and (1999 Recerts HCV *.38 hours) 283 Hours PH 2095 Hours HCV 346 Recerts for PH *.81 hours per recertification. 2243 Recerts for HCV *.93 hours per recertification	Yes. HASB has met this benchmark by reducing the number of annual recertifications and improving the time to process each recertification

<b>CE #5: Increase in Tenant Rent Share</b>				
<b>Activity 4: Biennial Recertifications</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Tenant rent share in dollars (increase)	Tenant rent share prior to implementation of the activity (in dollars)	Expected tenant rent share after implementation of the activity (in dollars)	Actual tenant rent share after implementation of the activity (in dollars)	Whether the outcome meets or exceeds the benchmark
Tenant rent share in dollars.	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<b>SS #1: Increase in Household Income</b> <b>Activity 4: Biennial Recertifications</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average earned Income of households in dollars.	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<b>SS #3: Increase in Positive Outcomes in Employment Status</b> <b>Activity 4: Biennial Recertifications</b>				
<i>Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households with minimum rent prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households with minimum rent after implementation of the activity (number).	Actual head(s) of households with minimum rent after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households with minimum rent prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households with minimum rent after implementation of the activity (percent).	Actual percentage of total work-able households with minimum rent after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
<b>Employed full time</b>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
<b>Employed part time</b>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
<b>Enrolled in an Educational Program</b>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<b>Enrolled in Job Training Program</b>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
<b>Unemployed</b>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
<b>Other (i.e. volunteer activities)</b>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>
	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Activity 4: Biennial Recertifications</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number or percentage of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Percentage of households receiving TANF assistance.	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<b>SS #8: Households Transitioned to Self-sufficiency</b>				
<b>Activity 4: Biennial Recertifications</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of minimum rent households transitioned to self-sufficiency. <i>The definition of self-sufficiency is to be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

## Activity 5: Local Verification Policies

This activity was approved in our FY 2009 MTW Annual Plan and was implemented on October 1, 2009.

### 1. Activity Description

This activity, and the flexibilities granted through this activity, allowed us to implement local verification policies for both the Affordable (Public) Housing and Housing Choice Voucher programs. The verification form used by HACSB was modified in FY 2011 to include Upfront Income Verification using HUD's Enterprise Income Verification (EIV) as the highest standard of verification. The secondary standard is documents observed to be satisfactory to verify income and source provided by the household. If additional verification is required, a third party written verification is requested and lastly we use third party oral as the lowest ranking of income verification. This activity has simplified the process for our families and the housing staff, which enables HACSB to improve this process.

### 2. Activity Status

This is an on-going activity. The HACSB staff time per verification has decreased significantly from the baseline time reported. Public Housing time spent per verification has reduced approximately 35% and HCV time per verification has reduced by approximately 47%. The information reported is from the most current twelve month period from April 1, 2013 through March 30, 2014.

### 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

### 4. Measurement Revisions

The metrics have been revised in compliance with the new standard metrics issued by HUD in the revised Form 50900. HACSB is adding metric CE1: Housing Agency Cost Savings to this activity. For this measurement, HACSB will use the total hours reported in the baseline of metric CE2: Staff Time Savings (6,947) times the average cost per hour as the baseline for this new measurement. Similarly, the benchmark for this metric will follow the benchmark of CE2: Staff Time Savings (4,580 hours times average cost per hour).

### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

### 6. Statutory Objective

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

<b>CE #1: Agency Cost Savings</b>				
<b>Activity 5: Local Verification Policies</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of income verification process	\$242,867 6,947 hours *\$34.96 staff cost per hour	\$160,117 4,580 hours * \$34.96 staff cost per hour	\$135,890 3,887 hours * \$34.96 staff cost per hour	Yes, HACSB has met and exceeded the benchmark for this activity.

<b>CE #2: Staff Time Savings</b>				
<b>Activity 5: Local Verification Policies</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours to conduct verifications	6,947 total hours 1,133 hours to process verifications in Public Housing; 5,814 in HCV (0.7 in PH and 0.8 in HCV to conduct verifications)	4,580 total hours 705 hours to process verifications in PH; 3,875 in HCV. The benchmarks will be the same for all forthcoming years.	3,887 total hours 590 hours to process verifications in PH (.25 hours per verification); 3,297 hours in HCV (.38 hours per verification)	Yes. HACSB has met and exceeded the benchmark established for this activity.

<b>CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Activity 5: Local Verification Policies</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in conducting verifications as a percentage of all files.	<i>Average error rate in conducting verifications prior to implementation of the activity will be reported in HACSB's FY 2015 Annual MTW Report.</i>	<i>Expected average error rate in conducting verifications after implementation of the activity will be reported in HACSB's FY 2015 Annual MTW Report.</i>	<i>Actual average error rate in conducting verifications after implementation of the activity will be reported in HACSB's FY 2015 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2015 Annual MTW report.</i>

## Activity 6: Elimination of Assets

This activity was approved in our FY 2009 MTW Annual Plan and was implemented on October 1, 2009

### 1. Activity Description

This activity excludes assets from the calculation of income. Information related to assets is not collected and income from assets is not considered as part of the rent calculation formula. This activity is applicable to both the Public Housing and Housing Choice Voucher programs.

This activity has generated reduced staff time associated with collection and verification of assets. It also alleviates the reporting burdens on our families, most of whom have little or few assets.

### 2. Activity Status

This activity is on-going. The established benchmarks were met in FY 2010 and have continued to be met wherein staff is not spending any hours calculating asset income in our Affordable Housing and Housing Choice Voucher Programs. No hardship requests were received for this activity as it benefits our families.

### 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

### 4. Measurement Revisions

The metrics have been revised in compliance with the new standard metrics issued by HUD in the revised Form 50900. HACSB has reported the staff time savings associated with this activity for Public Housing and for the Housing Choice Voucher programs separately. The staff time savings associated with this activity will now be consolidated. Additionally, we have added a new metric,

CE1: Agency Cost Savings for this activity which also consolidates the Public Housing and Housing Choice Voucher programs. HACSB will use the total number of hours reported as the baseline for metric CE2: Staff Time Savings (1,478) times the average cost per staff hour to set a baseline cost.

## 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

## 6. Statutory Objective

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

<b>CE #1: Agency Cost Savings</b>				
<b>Activity 6: Elimination of Assets</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total agency cost to collect and calculate asset income for both PH and HCV	\$51,671 (1,478 hours * \$34.96 average staff cost per hour)	Zero Cost in FY 2014 and beyond to collect and calculate asset income for PH and HCV	Zero hours in FY 2014 to collect and calculate asset income for PH and HCV	Yes, HACSB has met this benchmark

<b>CE #2: Staff Time Savings</b>				
<b>Activity 6: Elimination of Assets</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours of staff time to collect and calculate asset income for both PH and HCV	1,478 hours to collect and calculate asset income in Public Housing and HCV	Zero hours in FY 2010 and beyond to collect and calculate asset income for PH and HCV	Zero hours in FY 2014 to collect and calculate asset income for PH and HCV	Yes, HACSB has met this benchmark

<b>CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Activity 6: Elimination of Assets</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in determination of assets and asset income as a percentage of all files.	<i>Average error rate in determination of assets and asset income prior to implementation of the activity will be reported in HACSB's FY 2015 Annual MTW Report.</i>	<i>Expected average error rate in determination of assets and asset income after implementation of the activity will be reported in HACSB's FY 2015 Annual MTW Report.</i>	<i>Actual average error rate in determination of assets and asset income after implementation of the activity will be reported in HACSB's FY 2015 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2015 Annual MTW report.</i>

## Activity 7: Controlled Program Moves

This activity was approved in our FY 2009 MTW Annual Plan and implemented on February 1, 2010.

### 1. Activity Description

This activity limits voluntary program moves for Housing Choice Voucher participants to once per every two years upon verification from their current landlord that they are a tenant in good standing. We have established exceptions to this policy to provide for moves related to self-sufficiency and for reasonable accommodation.

### 2. Activity Status

HACSB reports approximately 655 moves in the most recent twelve month period from April 1, 2013 through March 30, 2014. Of these moves approximately 88% complied with the policy of no more than one move per every two years. The remaining 12% of moves were either not voluntary (change of ownership, failure to comply with HQS or otherwise not initiated by the Tenant) or voluntary moves requested for self-sufficiency or reasonable accommodation. While this policy has successfully reduced the number of moves processed annually, HACSB has increased the amount of time necessary to process each move by approximately 10% to ensure that residents are complying with this requirement.

### 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

### 4. Measurement Revisions

The metrics have been revised in compliance with the new standard metrics issued by HUD in the revised Form 50900. HACSB is adding metric CE1: Housing Agency Cost Savings to this activity. For this activity a new measurement has been added, formerly under Activity 8: Local Portability Policies, and

measures outbound portability moves. For this measurement, HACSB will use the total hours reported in the baseline of metric CE2: Staff Time Savings (4,599) times the average cost per hour as the baseline for this new measurement. The benchmark for this metric will also follow the same rules (reduced cost based on the % reduced hours) as the benchmark for CE2: Staff Time Savings.

## 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

## 6. Statutory Objective

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

<b>CE #1: Agency Cost Savings</b>				
<b>Activity 7: Controlled Program Moves</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total Cost of Moves Annually (including out-bound portability)	\$171,933 Annually \$160,781 for moves(4599 hours * \$34.96 average staff cost per hour or 958 moves per year) \$11,152 for out-bound portability (319 hours * \$34.96 average staff cost per hour)	\$56,217 Annually \$50,622 for moves (1,448 hours *\$34.96 average staff cost per hour or 302 moves per year) \$5,595 for out-bound portability (160 hours *\$34.96 average staff cost per hour)	\$126,904 Annually \$122,709 for moves (3,510 hours *\$34.96 average staff cost per hour or 655 moves per year) \$4,195 for out-bound portability (120 hours * \$34.96 average staff cost per hour)	No, HACSB did not meet the benchmark. Although the benchmark was not met, a significant decrease was realized. HACSB did meet its benchmark for the out-bound portability component.

<b>CE #2: Staff Time Savings</b>				
<b>Activity 7: Controlled Program Moves</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours annually to process program moves (including out-bound portability)	4,918 hours annually. 4,599 hours to process program moves annually (4.8 hours per move times 958 moves). 319 hours to process outbound portability in 2009	1,608 hours annually. 1,448 hours spent to process moves annually. 160 hours to process outbound ports. The benchmark will be the same for all forthcoming years.	3,630 hours annually. 3,510 hours spent to process moves annually (5.3 hours per move times 655 moves) 120 hours to process outbound portability from April 1, 2013 through March 30, 2014 (122 port outs *.98 hours per port)	No, we did not meet the benchmark. Although the benchmark was not met, a significant decrease was realized. HACSB did meet its benchmark for the out-bound portability component.

**Activity 8: Local Policies for Portability**

This activity was initially approved in our FY 2009 MTW Annual Plan and was modified through our FY 2010 Plan. The initial implementation of this activity began on October 1, 2009 and the work requirement for portability was implemented on August 1, 2010.

**1. Activity Description**

HACSB applies all MTW requirements to inbound portability participants. HCV participants porting into San Bernardino County are required to comply with HACSB’s MTW policies and requirements. In addition, a work requirement was implemented for eligible participants porting into HACSB’s jurisdiction.

**2. Activity Status**

The number of incoming ports has decreased significantly, thereby reducing staff hours and agency administrative costs. There were 94 families who ported into HACSB’s jurisdiction in FY2013. Of those port-in families, 15 households had earned income averaging \$15,444 per year.

**3. Proposed Modifications**

There have been no significant or non-significant changes or modifications to this activity.

**4. Measurement Revisions**

The metrics have been revised in compliance with the new Standard Metrics issued by HUD in

the revised Form 50900. HACSB has moved the measurement for out-bound portability to Activity 7: Controlled Program Moves. Since families are required to lease within HACSB's jurisdiction for two years, the volume of outbound ports, HAP and staff cost associated with processing outbound ports should decrease. We have included Standard Metrics CE #1: Agency Cost Savings and CE #2: Staff Time Savings.

### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

### 6. Statutory Objectives

This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures.

<i>CE #1: Agency Cost Savings</i>				
<i>Activity 8: Local Policies for Portability</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Annual cost of processing in-bound ports in dollars.	Annual cost of processing in-bound ports prior to implementation of the activity is \$70,059.84.  Cost calculation: 2,004 hours of staff time X \$34.96 average staff cost per hour.	Expected annual cost of processing in-bound ports after implementation of the activity is \$35,029.92.  Cost calculation: 1,002 hours of staff time X \$34.96 average staff cost per hour.	Actual annual cost of processing in-bound ports after implementation of the activity is \$13,739.28.  Cost calculation: 393 hours of staff time X \$34.96 average staff cost per hour.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>CE #2: Staff Time Savings</b>				
<b>Activity 8: Local Policies for Portability</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours of staff time spent annually to process in-bound portability	2,004 hours to process in-bound ports in FY 2009	1,002 hours to process in-bound ports. The benchmark will be the same for all forthcoming years.	393 hours to process in-bound ports in FY2013. There were 94 families who ported to HACSB's jurisdiction in FY2013.	Yes

## Activity 9: Elimination of Earned Income Disallowance

This activity was initially included in HACSB's FY 2009 Initial MTW Annual Plan and became effective on October 1, 2009 for participants in the Housing Choice Voucher and Affordable Housing programs.

### 1. Activity Description

Through this activity HACSB has eliminated the HUD Mandatory Earned Income Disallowance (EID) from the calculation of total tenant payment in the Housing Choice Voucher and Public Housing Programs.

### 2. Activity Status

During FY 2014, no families received the EID, thus zero staff hours were spent in managing EID. Additionally, with the Five Year Lease Assistance Program and Streamlined Lease Assistance Program currently in place, we have further streamlined the total tenant payment calculation. We did not receive any hardship requests for this activity.

### 3. Proposed Modifications

There are no proposed modifications to this activity.

### 4. Measurement Revisions

HACSB will report on this activity using Standard Metrics CE #1, CE #2, CE #3, and CE #5.

### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

## 6. Statutory Objective

This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures.

<i>CE #1: Agency Cost Savings</i>				
<i>Activity 9: Elimination of Earned Income Disallowance</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total annual cost of staff time spent to process EID	\$1,974 total. Total annual cost to process EID in FY 2009 for HCV program was \$193. Total annual cost to process EID in FY 2009 for PH program was \$1,764.	Zero cost to process EID	Average agency cost to process EID in FY2013 is \$0.	Yes

<i>CE #2: Staff Time Savings</i>				
<i>Activity 9: Elimination of Earned Income Disallowance</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours of staff time spent to process EID	58.4 total hours of staff time in FY 2009. 5.7 hours to manage EID in HCV in FY 2009. 52.7 hours to manage EID for PH in FY 2009.	Zero hours of staff time.	Zero hours of staff time to manage EID FY 2013	Yes

<b>CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Activity 9: Elimination of Earned Income Disallowance</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in calculating EID as a percentage of files with EID.	<i>Average error rate in calculating EID prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	Expected average error rate in calculating EID prior to implementation of the activity is 0%.	Actual average error rate in calculating EID after implementation of the activity is 0%.	Yes, the outcome meets the benchmark for this metric.

<b>CE #5: Increase in Tenant Rent Share</b>				
<b>Activity 9: Elimination of Earned Income Disallowance</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Tenant rent share in dollars (increase)	Tenant rent share prior to implementation of the activity (in dollars)	Expected tenant rent share after implementation of the activity (in dollars)	Actual tenant rent share after implementation of the activity (in dollars)	Whether the outcome meets or exceeds the benchmark
Tenant rent share in dollars for EID households.	<i>Tenant rent share for EID households prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected tenant rent share for EID households after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual tenant rent share for EID households after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

## Activity 10: Minimum Rent

This activity was approved in our FY 2009 MTW Annual Plan and implemented on October 1, 2009 for recertifications and on January 1, 2010 for all families.

### 1. Activity Description

This activity allowed HACSB to increase the minimum rent from the current regulatory maximum of \$50 to \$125 per month for all households in both the Affordable (Public) Housing and the Housing Choice Voucher Program.

### 2. Activity Status

This is an on-going activity. There have been no requests for Hardship exemption from the minimum

rent. Approximately 18% of Public Housing households and 14% of HCV households have a Total Tenant Payment at or less than the minimum rent of \$125. The information reported for this activity represents the most recent twelve months from April 1, 2013 through March 30, 2014.

### 3. Modifications to the Activity

There have been no significant or non-significant changes or modifications to this activity.

### 4. Measurement Revisions

HACSB will report on this activity with Standard Metrics CE #5, SS#1, SS #3, SS #4, and SS #8.

### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

### 6. Statutory Objective

This activity addresses the MTW statutory objectives to reduce costs and achieve greater effectiveness in federal expenditures and to assist families to become self-sufficient.

<i>CE #5: Increase in Tenant Rent Share Activity 10: Minimum Rent</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Tenant rent share in dollars (increase)	Tenant rent share prior to implementation of the activity (in dollars)	Expected tenant rent share after implementation of the activity (in dollars)	Actual tenant rent share after implementation of the activity (in dollars)	Whether the outcome meets or exceeds the benchmark
Average tenant rent share in dollars for minimum rent households	Average tenant rent share prior to implementation of the activity – <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This response will be provided with HACSB's FY14 MTW Annual Report</i>

<b>SS #1: Increase in Household Income</b>				
<b>Activity 10: Minimum Rent</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average earned Income of households paying minimum rent in dollars	<p><i>A combined total for PH and HCV will be provided with HACSB's FY14 MTW Report.</i></p> <p>Average earned income for PH households with TTP&lt;\$125 is \$10,833 prior to the implementation of this activity</p> <p>Average earned income of HCV households with TTP&lt;\$125 is \$8,023 prior to implementation of this activity.</p>	<p><i>A combined total for PH and HCV will be provided with HACSB's FY14 MTW Annual Report.</i></p> <p>Average household income for PH minimum rent families with earned income increases to \$11,916</p> <p>Average household income for HCV minimum rent families with earned income increases to \$8,709</p>	<p><i>A combined total for PH and HCV will be provided with HACSB's FY14 MTW Annual Report.</i></p> <p>\$9,191 average household income and \$4,044 average earned income for PH with TTP less than or equal to \$125</p> <p>\$15,941 average household income and \$10,599 earned income for HCV with TTP less than or equal to \$125</p>	<p><i>A combined total for PH and HCV will be provided with HACSB's FY14 MTW Annual Report.</i></p> <p>No, HACSB did not meet this benchmark.</p> <p>HACSB has met this benchmark for the HCV component.</p>

**SS #3: Increase in Positive Outcomes in Employment Status**

**Activity 10: Minimum Rent**

*Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.*

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households with minimum rent prior to implementation of the activity (number). This number may be zero.  Percentage of total work-able households with minimum rent prior to implementation of activity (percent). This number may be zero.	Expected head(s) of households with minimum rent after implementation of the activity (number).  Expected percentage of total work-able households with minimum rent after implementation of the activity (percent).	Actual head(s) of households with minimum rent after implementation of the activity (number).  Actual percentage of total work-able households with minimum rent after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.  Whether the outcome meets or exceeds the benchmark.
<b>Employed full time</b>	<i>Head(s) of households with minimum rent EMPLOYED FULL TIME prior to implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected head(s) of households with minimum rent EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual head(s) of households with minimum rent EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
	<i>Percentage of total work-able households with minimum rent EMPLOYED FULL TIME prior to implementation of activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected percentage of total work-able households with minimum rent EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual percentage of total work-able households with minimum rent EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>

<b>Employed part time</b>	<i>Head(s) of households with minimum rent EMPLOYED PART TIME prior to implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected head(s) of households with minimum rent EMPLOYED PART TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual head(s) of households with minimum rent EMPLOYED PART TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
	<i>Percentage of total work-able households with minimum rent EMPLOYED PART TIME prior to implementation of activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected percentage of total work-able households with minimum rent EMPLOYED PART TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual percentage of total work-able households with minimum rent EMPLOYED PART TIME after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
<b>Enrolled in an Educational Program</b>	<i>Head(s) of households with minimum rent ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected head(s) of households with minimum rent ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual head(s) of households with minimum rent ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
	<i>Percentage of total work-able households with minimum rent ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected percentage of total work-able households with minimum rent ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual percentage of total work-able households with minimum rent ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>

<b>Enrolled in Job Training Program</b>	<i>Head(s) of households with minimum rent ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected head(s) of households with minimum rent ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual head(s) of households with minimum rent ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
	<i>Percentage of total work-able households with minimum rent ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected percentage of total work-able households with minimum rent ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual percentage of total work-able households with minimum rent ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
<b>Unemployed</b>	<i>Head(s) of households with minimum rent UNEMPLOYED prior to implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected head(s) of households with minimum rent UNEMPLOYED after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual head(s) of households with minimum rent UNEMPLOYED after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
	<i>Percentage of total work-able households with minimum rent UNEMPLOYED prior to implementation of activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected percentage of total work-able households with minimum rent UNEMPLOYED after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual percentage of total work-able households with minimum rent UNEMPLOYED after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>

<b>Other (i.e. volunteer activities)</b>	<i>Head(s) of households with minimum rent IN OTHER ACTIVITIES prior to implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected head(s) of households with minimum rent IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual head(s) of households with minimum rent IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>
	<i>Percentage of total work-able households with minimum rent IN OTHER ACTIVITIES prior to implementation of activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected percentage of total work-able households with minimum rent IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual percentage of total work-able households with minimum rent IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Activity 10: Minimum Rent</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number or percentage of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Percentage of minimum rent households receiving TANF assistance.	<i>Percentage of households receiving TANF assistance prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected percentage of households receiving TANF assistance after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual percentage of households receiving TANF assistance after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

<b>SS #8: Households Transitioned to Self-sufficiency</b>				
<b>Activity 10: Minimum Rent</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of minimum rent households transitioned to self-sufficiency. <i>The definition of self-sufficiency will be provided in HACSB's FY 2014 Annual MTW Report.</i>	<i>Number of minimum rent households transitioned to self-sufficiency prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected number of minimum rent households transitioned to self-sufficiency after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual number of minimum rent households transitioned to self-sufficiency after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

## Activity 11: Local Project Based Voucher Program

This activity was approved in our FY 2009 Initial MTW Annual Plan. Our third amendment to the FY 2010 MTW Annual Plan helped clarify the components of our local program and this activity was implemented in September 2010.

### 1. Activity Description

HACSB has implemented a local Project-Based Voucher (PBV) program to increase the availability of quality housing units. The expansion of our housing authority and/or our affiliate nonprofit owned housing stock will allow us to continue to reinvest net income into the acquisition of additional affordable housing units. The flexibilities included under this activity are:

- Up to 100% percent of units in any development may be project-based;
- Up to 50% of the funding committed to vouchers may be allocated for PBV;
- PBV will be allocated to all of the public housing units approved for disposition other than 27 units to be rehabilitated in conjunction with the County Department of Behavioral Health (308 PBV units);
- Households residing in PBV units will not have automatic priority to receive tenant-based vouchers after one year, but instead will have such a priority after two years;
- A local PBV HAP contract which modifies the terms and conditions of the HAP contract, including the ability to execute PBV HAP contracts for groupings of non-contiguous scattered-site

properties and to contract for a total number of units by bedroom size within a development rather than for specific units;

- An over-housed household residing in a Public Housing unit that is disposed of and converted to a Project-Based Voucher may remain in its unit and HACSB will subsidize the household based on the size of the unit, not the qualifying voucher size;
- HACSB may require an under-housed household residing in a Public Housing unit that is disposed of and converted to a Project-Based Voucher to move with a voucher for the number of bedrooms for which the household qualifies;
- For a unit other than former Public Housing units, HACSB may designate the unit as a PBV unit and allow an in-place household for which the unit is a wrong-sized unit to remain in occupancy for up to one year, if the owner agrees to accept a PBV contract rent that does not exceed the HACSB subsidy standard for the household for the initial term of the lease.
- Initial contract rent for units owned by HACSB as defined in the PBV regulations may be determined using an HACSB market study that will consider local rental submarkets, in lieu of the requirement to use an independent entity with rents based on an appraisal by a state-certified appraiser.

## 2. Activity Status

At the commencement of this activity in FY2009, HACSB had 349 PBV units. To date, HACSB has increased its PBV units to 969 available units. In August, 2013 an AHAP was executed for Meadowbrook Park Apartments.

We have received Board approval for the following new PBV contracts, which are all pending execution, and all of which are currently owned or will be owned by the Housing Authority or affiliate nonprofit as per the approved flexibility under this activity:

Development Name	Units	Entity	Board Approved
Redlands Lugonia	85	HPI owned	February 2012
Bloomington	11	HPI affiliated	December 2013
Meadowbrook	47	HPI affiliated	March 2013 (AHAP effective 8/29/2013)
Yucaipa (Horizons)	50 (15 originally approved)	HPI affiliated	June 2013
San Bernardino	8	HPI affiliated	July 2012
<b>Total Units</b>	<b>201</b>		

## 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

## 4. Measurement Revisions

The metrics have been revised in compliance with the new standard metrics issued by HUD in the revised Form 50900. HACSB will report on this activity using Standard Metrics CE #1, CE #2, HC #4, and a local metric.

## 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

## 6. Statutory Objectives

This activity addresses the MTW statutory objective to increase housing choices for low income families.

<b>CE #1: Agency Cost Savings</b>				
<b>Activity 11: Local Project-Based Voucher Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of procurement for a PBV contract in dollars.	<i>Cost of procurement for a PBV contract prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected cost of procurement for a PBV contract after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual cost of procurement for a PBV contract after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

<b>CE #2: Staff Time Savings</b>				
<b>Activity 11: Local Project-Based Voucher Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff time to conduct procurement for a PBV contract in dollars.	<i>Total amount of staff time to conduct procurement for a PBV contract prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected amount of staff time to conduct procurement for a PBV contract after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual amount of staff time to conduct procurement for a PBV contract after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

<b>HC #4: Displacement Prevention</b>				
<b>Activity 11: Local Project-Based Voucher Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number).	Expected households losing assistance/moving after implementation of the activity (number).	Actual households losing assistance/moving after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households at or below 80% AMI that would lose assistance or need to move.	<i>Households losing assistance/ moving prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	Expected households losing assistance/ moving after implementation of the activity is 0.	<i>Actual households losing assistance/ moving after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

<b>Local Metric: Units of Project-Based Voucher Assistance Added to the HACSB Portfolio</b>				
<b>Activity 11: Local Project-Based Voucher Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of new PBV units added to the HACSB portfolio as a result of this activity.	349 units. At the implementation of this activity, 3.76% of the HACSB portfolio was PBV units.	1,856 units. Total PBV units, including HACSB or affiliate owned PBV units, to increase to 20% of portfolio by 2018.	969 units. In total, HACSB has increased its portfolio to 969 PBV units. Under this activity, 326 HACSB- or affiliate-owned PBV units have been added.	No, Total allocation of PBV units is currently 10.5% of HCV allocation. Under this activity, 4% of PBV units are HACSB or affiliate owned.

## Activity 12: Local Payment Standards

This activity was approved in our FY 2009 MTW Annual Plan and was modified in our FY 2012 MTW Annual Plan. The activity was implemented on July 1, 2011 for all new lease ups and recertifications.

### 1. Activity Description

San Bernardino County is the largest county in the contiguous United States by area and larger than any of the nine smallest states combined. This activity allows HACSB to establish a local payment standard

schedule that accurately reflects the varying rental submarkets that exist across our vast County. With the flexibility provided by this activity, HACSB does not use the HUD-published Fair Market Rents to establish payment standards for its jurisdiction. Instead, HACSB conducts a study of local market rents and establishes local payment standards for each of the nine submarkets that it has designated within its jurisdiction based upon the results of the market study. This activity has increased the housing choice for our families as they are now able to move to regions with better job prospects, transportation and schools, most of them being lower poverty areas.

## 2. Activity Status

This is an on-going activity. The activity, revised in 2012, established 2015 as the date by which to meet the benchmark goals. HACSB has made significant progress towards meeting the benchmark and has achieved it for submarket 6 and is within 1% of achievement for submarket 2.

## 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

## 4. Measurement Revisions

HACSB will report on this activity with Standard Metrics CE #1, CE #2, HC #5, and local metrics.

## 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

## 6. Statutory Objective

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

<i>CE #1: Agency Cost Savings Activity 12: Local Payment Standards</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of task in dollars.	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<b>CE #2: Staff Time Savings</b>				
<b>Activity 12: Local Payment Standards</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff time to complete the task in staff hours.	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<b>HC #5: Increase in Resident Mobility</b>				
<b>Activity 12: Local Payment Standards</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity (number). This number may be zero.	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number).	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity 12.	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity 12.
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity.	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>	<i>To be determined.</i>

<i>Local Metric: Average HAP Cost</i> <i>Activity 12: Local Payment Standards</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average HAP cost.	<i>Average HAP cost prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected average HAP cost after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual average HAP cost after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

<i>Local Metric: Households Able to Move from Areas of Poverty and/or Minority Concentration</i> <i>Activity 12: Local Payment Standards</i>							
<b>Unit of Measurement</b>	<b>Baseline</b>		<b>Benchmark</b>		<b>Outcome</b>		<b>Benchmark Achieved?</b>
Percentage of participants in submarkets 2 and 6	Submarket 2	25%	Submarket 2	21%	Submarket 2	22%	HACSB has not met the benchmark established for 2015. However, submarket 6 has achieved the benchmark and submarket 2 is within 1% of reaching the benchmark.
	Submarket 6	21%	Submarket 6	17%	Submarket 6	15%	
			Submarkets 2 and 6 see a decrease of 8% in three years.		Submarket 2 sees a decrease of 3% and Submarket 6 sees a decrease of 6%		

## Activity 13: Local Inspection Policies

This activity was approved in our FY 2010 MTW Annual Plan and was implemented on May 1, 2011.

### 1. Activity Description

This activity allows HACSB to develop and implement local inspection standards for the Voucher program that will increase our operational efficiencies as well as provide better housing options to low-income families. The frequency of inspections will be determined by a property rating system in alignment with HQS and local enhanced standards. 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.

### 2. Activity Status

In FY 2013, we completely outsourced our HCV inspections. To date, we are tracking the cost savings from the activity and our outsourcing efforts. We will also continue to do quality checks of our portfolio for accuracy, inspection standards and customer satisfaction. In FY 2013, the total costs to conduct inspections were \$402,463 which exceeded the benchmark bringing savings of %56 (\$305,088) from our baseline costs. This may be primarily due to the fact that the percentage of inspections that have qualified for biennial inspections has been well above the expected outcome.

### 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

### 4. Measurement Revisions

HACSB will report on this activity using Standard Metrics CE #1, CE #2, CE #3, and a local metric.

### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

### 6. Statutory Objective

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

<b>CE #1: Agency Cost Savings</b>				
<b>Activity 13: Local Inspection Policies</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total annual cost to conduct inspections	Total expenses for inspections is \$707,551	Total expenses for inspections is \$579,392 in two years	The total expense for inspections is \$402,463	Yes, HACSB has met the benchmark and surpassed the cost savings expected

<b>CE #2: Staff Time Savings</b>				
<b>Activity 13: Local Inspection Policies</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total time to complete HQS inspections in staff hours.	Total time to complete HQS inspections prior to implementation of the activity – This value will be provided with HACSB's FY14 MTW Annual Report	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This response will be provided with HACSB's FY14 MTW Annual Report</i>

<b>CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Activity 13: Local Inspection Policies</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in completing inspections as a percentage of all inspections.	<i>Average error rate in completing inspections prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected average error rate in completing inspections after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual average error rate in completing inspections after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

*The following is an agency developed and previously established metric that we would like to maintain in addition to the required standard metrics.*

**Activity 13: Local Inspection Policies**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of units that qualify for biennial inspections	0% of inspections were biennial	33% of our portfolio will qualify for biennial inspections	60% of the portfolio qualified for biennial inspections	Yes, this benchmark was achieved and surpassed.

## Activity 15: Pilot Work Requirement

This activity was approved in the FY 2010 MTW Annual Plan and was implemented on January 1, 2013 for the Maplewood Homes affordable housing community; it was implemented on August 1, 2010 for all incoming ports.

### 1. Activity Description

This activity requires families to participate for a minimum of 15 hours per week in “work” related activities. For the residents in our Maplewood Community, “work” under this activity encompasses participation in any one of three phases:

- Phase 1: activities removing barriers to gainful employment
- Phase 2: activities leading to gainful employment
- Phase 3: employment

“Work” activities are defined as a Resident’s participation in any of the three phases described below.

Residents will be allowed to participate in Phase One work activities (activities removing barriers to gainful employment) for up to two (2) years. After the two-year period, Residents are required to transition to the other two phases. Residents are allowed to participate in Phase Two work activities (activities leading to gainful employment) for a maximum of two (2) years. After the two-year period, Residents are required to transition to Phase Three (employment).

For incoming ports, the work requirement for all non-elderly and non-disabled families was implemented on August 1, 2010 in the Housing Choice Voucher Program, and all eligible household members (non-elderly and non-disabled) of the incoming portability family must be employed at least 15 hours per week within our County or within a reasonable driving distance, prior to the execution of the HAP contract and throughout their participation in our program. Non-compliant families will have their previous employment income imputed until new employment is obtained. This has helped families make educated decisions prior to their move to San Bernardino and assist them on their path to economic independence.

We currently have an onsite Workforce Development Specialist, once a week, contracted from the county's Workforce Development Department and an onsite full time Resident Services Coordinator. This activity has had a positive effect on the families by providing additional resources, through those mentioned above, in order to be able to assist families in participating in activities that will transition them to economic independence.

## **2. Activity Status**

Upon initial implementation, residents were given a six month transition period, allowing them time to comply prior to July 1, 2013, the date at which the transition period ended. Tremendous efforts were undertaken prior to implementation to ensure our families have access to the skills required to meet the work requirement. Researchers at Loma Linda University conducted an in-depth needs assessment which educated us about issues faced by the families like health barriers, lack of basic computer skills, high levels of debt, substance abuse, transportation etc. We have established partnerships with service providers to meet our family's needs, including onsite services and provide guidance through the process. Additionally, information sessions were held on site to educate residents about the work requirement.

## **3. Proposed Modifications**

There have been no significant or non-significant changes or modifications to this activity.

## **4. Measurement Revisions**

Per the "Frequently Asked Questions about HUD Form 50900: Elements for the MTW Annual Plan and MTW Annual Report, September 17, 2013," if the agency's first required document in the new format is the Plan, the agency will list the standard metrics in this Report and report on their outcomes in the next year's Report.

## **5. Changes to Authorizations**

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

## **6. Statutory Objective**

This activity addresses the statutory objective to provide incentives to families to achieve self-sufficiency.

<i>SS #1: Increase in Household Income Activity 15: Pilot Work Requirement</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
Dollars - average earned income of households in <b>Maplewood Homes</b> affected by this policy.	Average earned income of households affected by this policy prior to implementation of the activity is \$12,934.	Expected average earned income of households affected by this policy prior to implementation of the activity is \$13,349, a 5% increase by September 30, 2015.	Actual average earned income of households affected by this policy prior to implementation (in dollars).	This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.
Dollars - average adjusted income of <b>port-in</b> households affected by this policy; % increase of income	Average adjusted annual income at start of activity is \$13,966.	Expected average earned income of port-in households is \$16,061, an increase of 15% of average annual adjusted income	Average adjusted income for port families in FY 2013 is \$16,059, a 15% increase	No, but the outcome is within \$2 of achieving the benchmark.

**SS #3: Increase in Positive Outcomes in Employment Status**

**Activity 15: Pilot Work Requirement**

*Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.*

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category:	Head(s) of households in Pilot "Work" Requirement prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in Pilot "Work" Requirement after implementation of the activity (number).	Actual head(s) of households in Pilot "Work" Requirement after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full- Time				
(2) Employed Part- Time				
(3) Enrolled in an Educational Program				
(4) Enrolled in Job Training Program				
(5) Unemployed				
(6) Other				
	Percentage of total work-able households in Pilot "Work" Requirement prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in Pilot "Work" Requirement after implementation of the activity (percent).	Actual percentage of total work-able households in Pilot "Work" Requirement after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
<b>Employed full time</b>	Head(s) of households with FULL TIME EMPLOYMENT prior to implementation of the activity is 17.	Expected head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity is 27 by September 30, 2015.	Actual head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity (number).	This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.
	Percentage of total work-able households with FULL TIME EMPLOYMENT prior to implementation of activity is 6.6% (17/259).	Expected percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity is 11% (27/282) by September 30, 2015.	Actual percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity (percent).	

<b>Employed part time</b>	Head(s) of households with PART TIME EMPLOYMENT prior to implementation of the activity is 44.	Expected head(s) of households with PART TIME EMPLOYMENT after implementation of the activity is 54 by September 30, 2015.	Actual head(s) of households with PART TIME EMPLOYMENT after implementation of the activity (number).	This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.
	Percentage of total work-able households with PART TIME EMPLOYMENT prior to implementation of activity is 17% (44/259).	Expected percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity is 21% (54/282) by September 30, 2015.	Actual percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity (percent).	
<b>Enrolled in an Educational Program</b>	Head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity is 2.	Expected head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 4 by September 30, 2015.	Actual head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity (number).	This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.
	Percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity is 1% (2/259).	Expected percentage of total work-able households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 1.4% (4/282) by September 30, 2015.	Actual percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity (percent).	
<b>Enrolled in Job Training Program</b>	Head(s) of households ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity is 0.	Expected head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 2 by September 30, 2015.	Actual head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity (number).	This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.

	Percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity is 0%.	Expected percentage of total work-able households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 1% (2/282) by September 30, 2015.	Actual percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity (percent).	
<b>Unemployed</b>	Head(s) of households UNEMPLOYED prior to implementation of the activity is 198.	Expected head(s) of households UNEMPLOYED after implementation of the activity is 197 (denominator increases due to increase in families leased, numerator decreases).	Actual head(s) of households UNEMPLOYED after implementation of the activity (number).	This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.
	Percentage of total work-able UNEMPLOYED prior to implementation of activity is 76% (198/259).	Expected percentage of total work-able households UNEMPLOYED after implementation of the activity decreases by 6% (197/282) by September 30, 2015.	Actual percentage of total work-able UNEMPLOYED after implementation of the activity (percent).	
<b>Other (i.e. volunteer activities)</b>	Head(s) of households participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of the activity is 14.	Expected head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 16 by September 30, 2016.	Actual head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity (number).	This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.

	Percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of activity is 5.4% (14/259).	Expected percentage of total work-able households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity increases by 10%.	Actual percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity (percent).	
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**SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)  
Activity 15: Pilot Work Requirement**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving TANF assistance.	Number of households receiving TANF assistance prior to implementation of the activity – <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This response will be provided with HACSB's FY14 MTW Annual Report</i>

**SS #5: Households Assisted by Services that Increase Self-sufficiency  
Activity 15: Pilot Work Requirement**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.

Number of households receiving services aimed to increase self-sufficiency (increase).	Number of households receiving self sufficiency services prior to implementation of the activity – <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This response will be provided with HACSB's FY14 MTW Annual Report</i>
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<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</b> <b>Activity 15: Pilot Work Requirement</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average HAP for port-in families	Average HAP at start of activity is \$726.25	Reduction of 15% in Average HAP for incoming portability families	Average HAP payment for port families in FY 2013 of \$626.84.	No; however progress was made on a continuing reduction. From last year's HAP, this year's amount saw a 5% decrease. From the baseline, this year's HAP saw a 14% reduction from the baseline.

<b>SS #7: Increase in Tenant Rent Share</b> <b>Activity 15: Pilot Work Requirement</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Tenant rent share in dollars (increase)	Tenant rent share prior to implementation of the activity (in dollars)	Expected tenant rent share after implementation of the activity (in dollars)	Actual tenant rent share after implementation of the activity (in dollars)	Whether the outcome meets or exceeds the benchmark
PHA rental revenue in dollars due to increased rent amount from families' increased employment opportunities in the Maplewood Homes affordable housing community (increase).	Average household rent from program-eligible families residing at Maplewood Homes is \$194.	Increase of 2% per year in monthly household rent from year 2.	We have not yet reached the time period in which we expect to achieve the benchmark. This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.	

<b>SS #8: Households Transitioned to Self-sufficiency</b>				
<b>Activity 15: Pilot Work Requirement</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency (increase).  For this activity, HACSB defines self-sufficiency as "Voluntary termination of housing assistance and other forms of government assistance (TANF, Calworks, cash aid, etc.) due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to market-rate housing or homeownership).	0 households transitioned to self-sufficiency prior to implementation of the activity.	Expected households transitioned to self-sufficiency after implementation of the activity (number).	0 actual households transitioned to self-sufficiency after implementation of the activity (number).	We have not yet reached the time period in which we expect to achieve the benchmark. This information will be included in the FY2014 MTW report, in compliance with HUD Form 50900.

## Activity 17: Local Income Inclusions

This activity was approved in our FY 2011 MTW Annual Plan and implemented on May 1, 2011.

### 1. Activity Description

This activity allowed us to implement policies to include certain income from sources in the rent calculation that are currently excluded under regulation. The sources of income that are now included are foster care income and sanctioned Temporary Assistance to Needy Families (TANF) income whether due to non-compliance with self-sufficiency requirements, fraud or any other sanction reasons authorized by CALWORKS, except term limits.

### 2. Activity Status

This activity was implemented on May 1, 2011, and modified through our approved 2014 MTW Annual Plan. Since implementation, compliance with the TANF requirements has increased. This greater accountability works for our agency, the Transitional Assistance Department (TAD), and most significantly, our families, as it ensures they follow the path to economic independence. Prior to

implementation, the Department of Children Services was also informed about our policy change regarding foster care income and we have not received any concerns. However, our initial analysis shows that the number of families receiving foster care income at HACSB has gone down 100% in PH and was reduced by 20% in HCV. However, the average subsidy for PH has remained stagnant and the average HAP in HCV for affected families has gone up. There have been no hardship requests received for this activity for FY2014 to date.

### 3. Proposed Modifications

There have been no significant or non-significant changes or modifications to this activity.

### 4. Measurement Revisions

HACSB will report on this activity using Standard Metric CE #5.

### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

### 6. Statutory Objective

This activity addresses the MTW statutory objective to reduce costs and increase self-sufficiency.

<i>CE #5: Increase in Tenant Rent Share Activity 17: Local Income Inclusions</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Tenant rent share in dollars (increase)	Tenant rent share prior to implementation of the activity (in dollars)	Expected tenant rent share after implementation of the activity (in dollars)	Actual tenant rent share after implementation of the activity (in dollars)	Whether the outcome meets or exceeds the benchmark
Tenant rent share in dollars.	<i>Tenant rent share prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected tenant rent share after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual tenant rent share after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>

## Activity 18: Property Management Innovation

This activity was approved in our FY 2011 MTW Annual Plan and implemented on January 1, 2012.

### 1. Activity Description

This activity allowed HACSB to develop a property management innovation program that reflects private sector property management principles. The activity has the objective of implementing policies that are used in the private sector to decrease management costs, improve the quality of our units and assist our tenants in becoming familiar with the private sector property management principles. All residents signed a new lease which incorporated all the changes proposed in the activity. The lease reflected the following changes approved by HUD in our FY 2011 plan:

- a. 3 Day notice to pay or Quit (previous policy was 14 days).
- b. NSF fees of \$25.00 for first and \$35 for additional items (previous policy was \$25.00).
- c. Late fees increased from \$20 to \$50.
- d. Security deposits equal to one month's market rent (current security deposit charged is \$500.00)
- e. Implement a holding deposit of \$200.00
- f. Agency will choose lower of flat rent or 30% income rent for residents.
- g. Grievance Process – Previous two step process was replaced with a single on site settlement conference with staff for timely and effective resolutions to issues.

**2. Activity Status**

The activity has been progressing well. There have been no significant increases in late fees, lease violations or terminations due to the activity. There have been cost savings and administrative efficiencies gained from the streamlined grievance process, however residents receive a fair and objective chance to provide information so the agency can reconsider any actions. This activity continues to prepare residents for private sector living when they matriculate through the program.

**3. Proposed Modifications**

There have been no significant or non-significant changes or modifications to this activity.

**4. Measurement Revisions**

HACSB will report on this activity using Standard Metrics CE #1 and CE #2.

**5. Changes to Authorizations**

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

**6. Statutory Objectives**

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

<i>CE #1: Agency Cost Savings</i>				
<i>Activity 18: Property Management Innovation</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost for arbitration services (decrease)	Cost of task prior to implementation of the activity (in dollars)=\$6,550	Expected costs for arbitration services after implementation of the activity (in dollars)=\$0	Actual arbitration services costs after implementation of the activity (in dollars)=\$0	Yes

Average per unit contract vacancy turnaround expenses (decrease)	Cost of task prior to implementation of the activity = \$14 PUM (9/30/2011)	Expected average per unit contract vacancy turnaround expenses after implementation of the activity = \$11 PUM	Actual average per unit contract vacancy turnaround expenses after implementation of the activity = \$7 PUM (based on actuals for FY2014 through February 2014)	Yes
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<b>CE #2: Staff Time Savings</b>				
<b>Activity 18: Property Management Innovation</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total time spent on grievance processes in staff hours.	<i>Total amount of staff time dedicated to grievance processes prior to implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Expected total amount of staff time dedicated to grievance processes after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>Actual total amount of staff time dedicated to grievance processes after implementation of the activity will be reported in HACSB's FY 2016 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2016 Annual MTW Report.</i>

## Activity 19: Local FSS Program

This activity was approved in our FY 2011 MTW Annual Plan and was implemented on July 1, 2012.

### 1. Activity Description

HACSB has developed a pilot local FSS (Family Self-sufficiency) program to help families in their self-sufficiency efforts. 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 Housing Choice Voucher or Affordable Housing program due to self-sufficiency efforts.

### 2. Activity Status

Since its implementation in July 2012, one hundred twenty six (126) families have enrolled in the program. Seventy (70) families have enrolled in the program under the guidelines of this activity and fifty-six (56) have enrolled under the traditional FSS program guidelines as a control group to compare and contrast with our local program participants. We intend to follow both sets of families throughout their five year term to identify which families have the greatest success in completing the FSS Contract of Participation. The newly established Program Coordinating Committee continues to meet on a quarterly basis identifying ways to leverage resources, collaborate on funding opportunities, and meet

the diverse needs of participant families.

### 3. Proposed Modifications

There are no proposed modifications to this activity.

### 4. Measurement Revisions

The metrics have been revised in compliance with the new standard metrics issued by HUD in the revised Form 50900. As directed, if one of the new standard metrics had not been used in previous MTW Annual Reports, the HA will begin tracking the activity using the standard metrics in the current fiscal year.

### 5. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our approved MTW Annual Plan for this activity.

### 6. 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.

<b>SS #1: Increase in Household Income</b> <b>Activity 19: Local FSS Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy.	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average earned income of households participating in HACSB's FSS program.	The average earned income of households participating in HACSB's FSS program prior to implementation of this activity – <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This response will be provided with HACSB's FY14 MTW Annual Report</i>

<b>SS #2: Increase in Household Savings</b> <b>Activity 19: Local FSS Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average savings/escrow amount of households affected by this policy prior to implementation of the activity in dollars (increase). This number may be zero.	Expected average savings/escrow amount of households affected by this policy after implementation of the activity in dollars (increase).	Actual average savings/escrow amount of households affected by this policy after implementation of the activity in dollars (increase).	Whether the outcome meets or exceeds the benchmark.

Average amount of escrow of Local FSS households in dollars.	<i>Average escrow amount of Local FSS households prior to implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Expected average escrow amount of Local FSS households after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>Actual average escrow amount of Local FSS households after implementation of the activity will be reported in HACSB's FY 2014 Annual MTW Report.</i>	<i>The outcome will be reported in HACSB's FY 2014 Annual MTW Report.</i>
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**SS #3: Increase in Positive Outcomes in Employment Status  
Activity 19: Local FSS Program**

*Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.*

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
<b>Employed full time</b>	Head(s) of households with FULL TIME EMPLOYMENT prior to implementation of the activity is 8.	Expected head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity is 20.	Actual head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity (number).	Outcomes will be reported in the FY 2014 Annual Report (per HUD FAQ instructions dated 9/17/2013)

	Percentage of total work-able households with FULL TIME EMPLOYMENT prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity (percent).	Actual percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity (percent).	
<b>Employed part time</b>	Head(s) of households with PART TIME EMPLOYMENT prior to implementation of the activity is 22.	Expected head(s) of households with PART TIME EMPLOYMENT after implementation of the activity is 22.	Actual head(s) of households with PART TIME EMPLOYMENT after implementation of the activity (number).	Outcomes will be reported in the FY 2014 Annual Report (per HUD FAQ instructions dated 9/17/2013)
	Percentage of total work-able households with PART TIME EMPLOYMENT prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity (percent).	Actual percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity (percent).	
<b>Enrolled in an Educational Program</b>	Head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity is 8.	Expected head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 9.	Actual head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity (number).	Outcomes will be reported in the FY 2014 Annual Report (per HUD FAQ instructions dated 9/17/2013)
	Percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity (percent).	Actual percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity (percent).	
<b>Enrolled in Job Training Program</b>	Head(s) of households ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity is 0.	Expected head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 3.	Actual head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity (number).	Outcomes will be reported in the FY 2014 Annual Report (per HUD FAQ instructions

	Percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity (percent).	Actual percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity (percent).	dated 9/17/2013)
<b>Unemployed</b>	Head(s) of households UNEMPLOYED prior to implementation of the activity is 40.	Expected head(s) of households UNEMPLOYED after implementation of the activity is 27.	Actual head(s) of households UNEMPLOYED after implementation of the activity (number).	Outcomes will be reported in the FY 2014 Annual Report (per HUD FAQ instructions dated 9/17/2013)
	Percentage of total work-able UNEMPLOYED prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households UNEMPLOYED after implementation of the activity (percent).	Actual percentage of total work-able UNEMPLOYED after implementation of the activity (percent).	
<b>Other (i.e. volunteer activities)</b>	Head(s) of households participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of the activity is 0.	Expected head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 17.	Actual head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity (number).	Outcomes will be reported in the FY 2014 Annual Report (per HUD FAQ instructions dated 9/17/2013)
	Percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity (percent).	Actual percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity (percent).	

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Activity 19: Local FSS Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households participating in HACSB's FSS program receiving TANF assistance.	The number of households participating in HACSB's FSS program receiving TANF assistance prior to implementation of the activity – <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>

<b>SS #5: Households Assisted by Services that Increase Self-Sufficiency</b>				
<b>Activity 19: Local FSS Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase self-sufficiency (increase).	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase self-sufficiency	The number of households receiving self-sufficiency services prior to implementation of the activity – <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>

<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</b>				
<b>Activity 19: Local FSS Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average amount of HAP or Tenant Rent per household for households participating in HACSB's FSS program	The average subsidy per household affected by this policy prior to implementation of the local FSS program – <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>

<b>SS #7: Increase in Tenant Rent Share</b>				
<b>Activity 19: Local FSS Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Tenant rent share in dollars (increase)	Tenant rent share prior to implementation of the activity (in dollars)	Expected tenant rent share after implementation of the activity (in dollars)	Actual tenant rent share after implementation of the activity (in dollars)	Whether the outcome meets or exceeds the benchmark
Average tenant rent share in dollars	Average tenant rent share prior to implementation of the activity - <i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>– This value will be provided with HACSB's FY14 MTW Annual Report</i>	<i>– This value will be provided with HACSB's FY14 MTW Annual Report</i>

<b>SS #8: Households Transitioned to Self-sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase).	Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.

For this activity, HACSB defines self-sufficiency as “Voluntary termination of housing assistance and other forms of government assistance (TANF, Calworks, cash aid, etc.) due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to market-rate housing or homeownership.	0 households transitioned to self-sufficiency prior to implementation of the activity (number).	<i>This value will be provided with HACSB’s FY14 MTW Annual Report</i>	The number of actual households transitioned to self-sufficiency after implementation of the activity will be reported in HACSB’s FY 2014 MTW Annual Report.	Outcomes will be reported in the FY 2014 Annual Report (per HUD FAQ instructions dated 9/17/2013)
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## Activity 20: Five Year Lease Assistance Program (formerly Term Limits)

This activity was approved in our FY 2011 MTW Annual Plan and was implemented on January 1, 2012. It is being slightly revised in the FY 2015 MTW Annual Plan to include potential termination from the program for noncompliance with the household’s Supportive Services Agreement. Termination for noncompliance with program obligations is already a part of this activity.

### A. Activity Description

This activity implements a five year term limit with flat subsidy on housing assistance for new households (excluding elderly and disabled) in our Housing Choice Voucher Program.

### B. Activity Status

Currently, there are 694 families on our Five Year Lease Assistance Program. The goal of the activity is to help our families focus on their self-sufficiency efforts while we assist them with their housing needs for a specific term. In addition, all eligible family members work with our Community Development Initiatives Department to develop a personalized Individual Training and Service Plans (ITSP), which is part of the Supportive Services Agreement. This plan helps our families map out their five year plan and establish milestones on their path to self-sufficiency.

The activity is still in the initial implementation phase. The ultimate goal of this activity will not be realized until the fourth and fifth year of implementation. We are also working with Loma Linda University, which is conducting a longitudinal study which will follow the first 700 families through this activity, tracking their goals and accomplishments. Together with Loma Linda University, we continue to develop this program through processes and tracking methods. In FY 2013, we worked with the Workforce Investment Board (WIB) and placed a workforce development specialist at our Housing Programs Office in San Bernardino and the Maplewood Homes Affordable Housing Community. This specialist provides job training programs and ‘leads’ that will help our families secure employment and earn a ‘living wage’ moving them closer to economic independence. During the past 12 month period, the workforce development specialist has been able to assist 29 Five Year Lease Assistance program participants to obtain employment.

### C. Proposed Modifications

The success of this activity depends on our families continuing to work to achieve the milestones included in the ITSP that was established with the assistance of our Community Development Initiatives Department. To ensure active participation and compliance with the Family Obligations Contract and the Supportive Services Agreement which includes the ITSP (Addendum), we are carefully monitoring each family's progress toward their five year goals. Should a participant not comply with the program requirements, as stipulated in the Family Obligations Contract, the family may be terminated from the program. The standard program violation policy included in the HACSB Administrative Plan would be applied in these situations.

### D. Measurement Revision

The metrics have been revised in compliance with the new standard metrics issued by HUD in the revised Form 50900. As directed, if one of the new standard metrics had not been used in previous MTW Annual Reports, the HA will begin tracking the activity using the standard metrics in the current fiscal year.

### F. Changes to Authorizations

There has been no change in the Attachment C authorizations that were waived under our originally approved MTW Annual Plan for this activity.

### G. 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.

<i>SS #1: Increase in Household Income</i>				
<i>Activity 20: Five Year Lease Assistance Program</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average earned income of families affected by this policy in the Five Year Lease Assistance Program.	Average earned income of families affected by this policy prior to implementation of the policy in Year 1 was \$12, 181.	Expected average earned income of affected families will increase by 45% by 9/30/2015 and 75% by 9/30/2018.	Actual average earned income of affected families in Year 2 was \$17,255.	No. Expected to reach benchmark by year 2015. However, earned income did increase by 42%.

**SS #3: Increase in Positive Outcomes in Employment Status**

**Activity 20: Five Year Lease Assistance Program**

*Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.*

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
<b>Employed full time</b>	Head(s) of households with FULL TIME EMPLOYMENT prior to implementation of the activity in Year 1 is 219.	Expected head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity is 389.	Actual head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity in Year 2 is 251.	No. Expected to reach benchmark by year 2 Activity 20: Five Year Lease Assistance Program 015.
	Percentage of total work-able households with FULL TIME EMPLOYMENT prior to implementation of the activity in Year 1 is 32%.	Expected percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity is 56%.	Actual percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity in Year 2 is 36%.	No. Expected to reach benchmark by year 2015.
<b>Employed part time</b>	Head(s) of households with PART TIME EMPLOYMENT prior to implementation of the activity in Year 1 is 164.	Expected head(s) of households with PART TIME EMPLOYMENT after implementation of the activity 201.	Actual head(s) of households with PART TIME EMPLOYMENT after implementation of the activity in Year 2 is 166.	No. Expected to reach benchmark by year 2015.
	Percentage of total work-able households with PART TIME EMPLOYMENT prior to implementation of activity in Year 1 is 24%.	Expected percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity is 29%.	Actual percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity in Year 2 is 24%.	No. Expected to reach benchmark by year 2015.
<b>Enrolled in an Educational Program</b>	Head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity in Year 1 is 43.	Expected head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 100.	Actual head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity in Year 2 is 80.	No. Expected to reach benchmark by year 2015.
	Percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity in Year 1 is 6%.	Expected percentage of total work-able households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity 14%.	Actual percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity in Year 2 is 11%.	No. Expected to reach benchmark by year 2015.

<b>Enrolled in Job Training Program</b>	Head(s) of households ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity is 30.	Expected head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 50.	Actual head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 29.	No. Expected to reach benchmark by year 2015.
	Percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity in Year 1 is 4%.	Expected percentage of total work-able households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 7%.	Actual percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity in Year 2 is 4%.	No. Expected to reach benchmark by year 2015.
<b>Unemployed</b>	Head(s) of households UNEMPLOYED prior to implementation of the activity is 329.	Expected head(s) of households UNEMPLOYED after implementation of the activity is 269.	Actual head(s) of households UNEMPLOYED after implementation of the activity is 277.	No. Expected to reach benchmark by year 2015.
	Percentage of total work-able UNEMPLOYED prior to implementation of activity in Year 1 is 47%.	Expected percentage of total work-able households UNEMPLOYED after implementation of the activity is 39%.	Actual percentage of total work-able UNEMPLOYED after implementation of the activity in Year 2 is 40%.	No. Expected to reach benchmark by 2015.
<b>Other (i.e. volunteer activities)</b>	Head(s) of households participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of the activity in Year 1 is 0.	Expected head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 54.	Actual head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity in Year 2 is 27.	No. Expected to reach benchmark by 2015.
	Percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of activity in Year 1 is 0%.	Expected percentage of total work-able households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 8%.	Actual percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity in Year 2 is 4%.	No. Expected to reach benchmark by 2015.

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b> <b>Activity 20: Five Year Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving TANF assistance.	Households receiving TANF prior to implementation of the activity in Year 1 is 267.	Expected number of households receiving TANF after implementation of the activity is 240.	Actual households receiving TANF after implementation of the activity in Year 2 is 270.	No. Expected to reach benchmark by 2015.

<b>SS #5: Households Assisted by Services that Increase Self-Sufficiency</b> <b>Activity 20: Five Year Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase self-sufficiency (increase).	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase self-sufficiency (increase)	Households receiving self-sufficiency services prior to implementation of the activity in Year 1 is 695.	Expected number of households receiving self-sufficiency services after implementation of the activity is 625.	Actual households receiving self-sufficiency services after implementation of the activity in Year 2 is 694.	No. Expected benchmark will be reached by year 2015.

<b>SS #8: Households Transitioned to Self-sufficiency</b> <b>Activity 20: Five Year Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency after implementation of the activity (number).	Actual households transitioned to self-sufficiency after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.

Number of households transitioned to self-sufficiency (increase). For this activity, HACSB defines self-sufficiency as “Voluntary termination of housing assistance and other forms of government assistance (TANF, Calworks, cash aid, etc.) due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to market-rate housing or homeownership.	Households transitioned to self-sufficiency prior to implementation of the activity in Year 1 is 0.	Expected households transitioned to self-sufficiency after implementation of the activity is 174 or 25% of participating families.	Actual households transitioned to self-sufficiency after implementation of the activity in Year 2 is 1.	No. Benchmark expected to be reached by year 2017.
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## B. Not Yet Implemented Activities

### Activity 22: Streamlined Lease Assistance Program

This activity was approved in our FY 2013 MTW Annual Plan and is planned to be implemented beginning November 1, 2014.

#### A. Activity Description

Through this activity, HACSB will develop a tiered subsidy/rent schedule, based on annual income, to calculate the total tent payment (TTP) for all non-elderly and non-disabled households participating in the Housing Choice Voucher and Affordable Housing (Public Housing) portfolios. For all elderly and disabled households, TTP will be based on a fixed percentage of the gross annual income that has been adjusted to account for deductions and allowances. If the percentage of annual income is more than the ceiling rent for Affordable Housing or contract rent for Housing Choice Voucher Program, then the lesser of the TTP or rent will be charged.

#### **TIERED LEASE ASSISTANCE PROGRAM:**

The subsidy/rent tier for all non-elderly and non-disabled families will be effective at each biennial recertification and will start at 21% of annual income and increase by 3% at every recertification (two years) to a maximum 30% of annual income. No other deductions or allowances (e.g. dependents, elderly/disabled, childcare, medical, disability expense, utility, etc.) will be provided, since these have been taken into account in determining the baseline percentage amount of 21%. At each recertification, an individualized baseline will be established and the TTP will never drop below the prior baseline. Families will not be subject to any changes in their calculations in between tiers, hence an increase in family income would equate to additional savings for the family.

#### **TIERED SCHEDULE FOR NON ELDERLY AND NON DISABLED HOUSEHOLDS**

Timeline	Next recertification	Year 2	Year 4	Year 6
Percentage	21%	24%	27%	30%

**FIXED LEASE ASSISTANCE PROGRAM:**

For all elderly and disabled households, HACSB will use a flat 24% of gross annual income to calculate the total tenant payment. This process will eliminate all other deductions and allowances (e.g. dependents, elderly/disabled, childcare, medical, disability expense, utility, etc.) resulting in a simpler calculation which will benefit the agency and the family. The baseline percentage has taken into account deductions and allowances. These families will not be subject to a tier and the 24% of annual income will be effective at their next biennial recertification.

**FIXED PERCENTAGE FOR ELDERLY AND DISABLED HOUSEHOLDS**

<b>Timeline</b>	Next recertification
<b>Percentage</b>	24%

HACSB participates in an Energy Performance Contract (EPC) within its affordable housing program. The incentives associated with the EPC are an add-on subsidy and a utility allowance reduction calculation. The proposed tiered and/or subsidy/rent schedule has been adjusted to account for utility allowances. HACSB will continue to calculate the utility allowance reduction incentive separately for applying the incentive on the affordable housing Operating Subsidy application.

The goal of this activity is twofold: first to simplify the cumbersome rent calculation process and achieve administrative efficiencies; and second to help families better understand the rent structure and prepare them for economic independence. The activity will apply to all current and new families in our Housing Choice Voucher and Affordable Housing Programs (except those in the Five Year Lease Assistance Program). This process will also greatly benefit the agency and the administrative efficiencies gained will help case managers guide families towards other economic independence services. HACSB has implemented a biennial schedule for recertifications (Activity 4) and therefore families will not be subject to a change until their next recertification. Since the tiered subsidy/rent has incorporated the allowances and deductions, it simplifies the process and reduces time spent verifying and calculating the adjusted income. Furthermore, the impact analysis shows a minimal initial change for our families yet significant efficiencies for the agency.

We plan to examine the effects of the tiered subsidy/rent schedules by conducting a research study with a partner like Loma Linda University. We believe the activity will increase accountability and promote self-sufficiency activities in our families thus resulting in economic independence.

The following metrics will be used to report outcomes for this activity:

<b>CE #1: Agency Cost Savings</b>				
<b>Activity 22: Streamlined Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.

Total cost of recertifications	Total cost of recertifications prior to implementation of this activity – <i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>
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**CE #2: Staff Time Savings**  
**Activity 22: Streamlined Lease Assistance Program**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total time to complete recertifications in staff hours	Total amount of staff time dedicated to the task prior to implementation of the activity - <i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>

**CE #3: Decrease in Error Rate of Task Execution**  
**Activity 22: Streamlined Lease Assistance Program**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in completing recertifications as a percentage	Average error rate of recertifications prior to implementation of the activity - <i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>

<b>SS #1: Increase In Household Income</b>				
<b>Activity 22: Streamlined Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars)	Expected average earned income of households affected by this policy prior to the implementation of the activity (in dollars)	Actual average earned income of households affected by this policy prior to implementation (in dollars)	Whether the outcome meets or exceeds the benchmark.
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars) - <i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>

<b>SS #3: Increase in Positive Outcomes in Employment Status</b>				
<b>Activity 22: Streamlined Lease Assistance Program</b>				
<i>Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in Streamlined Lease Assistance Program prior to implementation of the activity (number). This number may be zero.  Percentage of total work-able households in Streamlined Lease Assistance Program prior to implementation of activity (percent). This number may be zero.	Expected head(s) of households in Streamlined Lease Assistance Program after implementation of the activity (number).  Expected percentage of total work-able households in Streamlined Lease Assistance Program after implementation of the activity (percent).	Actual head(s) of households in Streamlined Lease Assistance Program after implementation of the activity (number).  Actual percentage of total work-able households in Streamlined Lease Assistance Program after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.  Whether the outcome meets or exceeds the benchmark.

<b>Employed full time</b>	<i>Head(s) of households in Streamlined Lease Assistance Program EMPLOYED FULL TIME prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected head(s) of households in Streamlined Lease Assistance Program EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual head(s) of households in Streamlined Lease Assistance Program EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
	<i>Percentage of total work-able households in Streamlined Lease Assistance Program EMPLOYED FULL TIME prior to implementation of activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected percentage of total work-able households in Streamlined Lease Assistance Program EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual percentage of total work-able households in Streamlined Lease Assistance Program EMPLOYED FULL TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
<b>Employed part time</b>	<i>Head(s) of households in Streamlined Lease Assistance Program EMPLOYED PART TIME prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected head(s) of households in Streamlined Lease Assistance Program EMPLOYED PART TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual head(s) of households in Streamlined Lease Assistance Program EMPLOYED PART TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>

	<i>Percentage of total work-able households in Streamlined Lease Assistance Program EMPLOYED PART TIME prior to implementation of activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected percentage of total work-able households in Streamlined Lease Assistance Program EMPLOYED PART TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual percentage of total work-able households in Streamlined Lease Assistance Program EMPLOYED PART L TIME after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
<b>Enrolled in an Educational Program</b>	<i>Head(s) of households in Streamlined Lease Assistance Program ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected head(s) of households in Streamlined Lease Assistance Program ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual head(s) of households in Streamlined Lease Assistance Program ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
	<i>Percentage of total work-able households in Streamlined Lease Assistance Program ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected percentage of total work-able households in Streamlined Lease Assistance Program ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual percentage of total work-able households in Streamlined Lease Assistance Program ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>

<b>Enrolled in Job Training Program</b>	<i>Head(s) of households in Streamlined Lease Assistance Program ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected head(s) of households in Streamlined Lease Assistance Program ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual head(s) of households in Streamlined Lease Assistance Program ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
	<i>Percentage of total work-able households in Streamlined Lease Assistance Program ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected percentage of total work-able households in Streamlined Lease Assistance Program ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual percentage of total work-able households in Streamlined Lease Assistance Program ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
<b>Unemployed</b>	<i>Head(s) of households in Streamlined Lease Assistance Program UNEMPLOYED prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected head(s) of households in Streamlined Lease Assistance Program UNEMPLOYED after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual head(s) of households in Streamlined Lease Assistance Program UNEMPLOYED after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>

	<i>Percentage of total work-able households in Streamlined Lease Assistance Program UNEMPLOYED prior to implementation of activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected percentage of total work-able households in Streamlined Lease Assistance Program UNEMPLOYED after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual percentage of total work-able households in Streamlined Lease Assistance Program UNEMPLOYED after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
<b>Other (i.e. volunteer activities)</b>	<i>Head(s) of households in Streamlined Lease Assistance Program IN OTHER ACTIVITIES prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected head(s) of households in Streamlined Lease Assistance Program IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual head(s) of households in Streamlined Lease Assistance Program IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>
	<i>Percentage of total work-able households in Streamlined Lease Assistance Program IN OTHER ACTIVITIES prior to implementation of activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected percentage of total work-able households in Streamlined Lease Assistance Program IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual percentage of total work-able households in Streamlined Lease Assistance Program IN OTHER ACTIVITIES after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Activity 22: Streamlined Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>

Number or percentage of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Percentage of Streamlined Lease Assistance Program households receiving TANF assistance.	<i>Percentage of Streamlined Lease Assistance Program households receiving TANF assistance prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected percentage of Streamlined Lease Assistance Program households receiving TANF assistance after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual percentage of Streamlined Lease Assistance Program households receiving TANF assistance after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity</i>

<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households Activity 22: Streamlined Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars	Average subsidy per household affected by this policy prior to implementation of the activity - <i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>	<i>This value will be provided with HACSB's first MTW Annual Report after implementation of the activity</i>

<b>SS #7: Increase in Tenant Rent Share</b>				
<b>Activity 22: Streamlined Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Tenant rent share in dollars (increase)	Tenant rent share prior to implementation of the activity (in dollars)	Expected tenant rent share after implementation of the activity (in dollars)	Actual tenant rent share after implementation of the activity (in dollars)	Whether the outcome meets or exceeds the benchmark
Tenant rent share in dollars for Streamlined Lease Assistance Program Households.	<i>Tenant rent share in dollars for Streamlined Lease Assistance Program Households prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected tenant rent share in dollars for Streamlined Lease Assistance Program Households after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual tenant rent share in dollars for Streamlined Lease Assistance Program Households after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity</i>

<b>SS #8: Households Transitioned to Self-sufficiency</b>				
<b>Activity 22: Streamlined Lease Assistance Program</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency through the Streamlined Lease Assistance Program. Definition will be provided after implementation of the activity.	<i>Households transitioned to self-sufficiency through the Streamlined Lease Assistance Program prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected households transitioned to self-sufficiency through the Streamlined Lease Assistance Program prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual households transitioned to self-sufficiency through the Streamlined Lease Assistance Program prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity</i>

## **B. Implementation Plan Update**

In 2014, HACSB has developed the internal procedures for implementation of the Streamlined Lease Assistance Activity. All staff have been trained regarding the new activity, with specialized training for those staff directly involved with the recertification process. Additionally, HACSB has continued its activities related to communication with stakeholders regarding the new activity. A new Fact Sheet was developed, information was shared with the Resident Advisory Board, and HACSB is in the process of developing an informational video about the activity. The video will be aired in the lobby of HACSB's main program office, posted on our website, and emailed directly to partners and other stakeholders. The software conversion related to this activity is anticipated to be complete in December of 2014. The transition to Streamlined Lease Assistance for existing and new households will begin on February 1, 2015.

## **C. Implementation Timeline**

1. 2013:
  - a. Approval of activity via HACSB's 2013 MTW Annual Plan.
  - b. Revisions to Administrative Plan and Admissions and Continued Occupancy Policy approved by HACSB Board of Commissioners.
2. 2014:
  - a. Internal process development and training.
  - b. Communication with stakeholders.
  - c. October 2014: Begin recertifications effective February 2015.
  - d. December 2014: Anticipated software modification complete and live.
3. February 1, 2015: Currently assisted households (except those participating in 5-Year Lease Assistance Program) will be transitioned to Streamlined Lease Assistance Program at their first biennial reexamination effective one or after this date. New elderly/disabled households admitted after this date will be placed in the Streamlined Lease Assistance program.
4. January 2017: Transition of all eligible currently assisted households to Streamlined Lease Assistance Program complete.

## **D. Proposed Modifications**

There are no proposed modifications to this activity.

## **Activity 23: No Child Left Unsheltered**

### **A. Activity Description**

The "No Child Left Unsheltered" program aims to end homelessness of any unsheltered family with children in San Bernardino County, with special attention to the education and well-being of the children and the economic advancement of the parents. No Child Left Unsheltered will help resolve extremely critical needs of unsheltered families in the county by offering housing choice voucher rental subsidies to families who are identified as eligible unsheltered homeless families with children through our strong partnerships, particularly with the local school district. The program also will provide families with supportive services and resources such as emergency relief, school connections with community

support, and job training for parents.

The Housing Authority will partner with a variety of local community service providers, including the school system, to identify families, particularly those with school-age children, who are unsheltered. Each identified family will be encouraged to apply for assistance, and if eligible, will receive assistance after being selected from the targeted waiting list.

Through this activity, HACSB will set aside 40 housing choice vouchers to be made available to eligible families meeting the criteria under this program. Families would be assisted through a separate waiting list, which would be maintained specifically for this program. The rental subsidy will be determined based on the same methodology used in the Streamlined Lease Assistance program.

HACSB will use the following Standard Metrics and local metric to report on this activity:

<b>CE #4: Increase in Resources Leveraged Activity 23: No Child Left Unsheltered</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).	Actual amount leveraged after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Amount of funds leveraged in dollars.	<i>Amount leveraged prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Amount leveraged prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Amount leveraged prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>

<b>SS #8: Households Transitioned to Self-sufficiency Activity 23: No Child Left Unsheltered</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.

Number of households transitioned to self-sufficiency through NCLU. Definition will be provided after implementation of the activity.	<i>Households transitioned to self-sufficiency through NCLU prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected households transitioned to self-sufficiency through NCLU prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual households transitioned to self-sufficiency through NCLU prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity</i>
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<b>HC #3: Decrease in Wait List Time</b> <b>Activity 23: No Child Left Unsheltered</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average applicant time on wait list in months (decrease).	Average applicant time on wait list prior to implementation of the activity (in months).	Expected average applicant time on wait list after implementation of the activity (in months).	Actual average applicant time on wait list after implementation of the activity (in months).	Whether the outcome meets or exceeds the benchmark.
Average applicant time on wait list in months.	<i>Average applicant time on wait list prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected average applicant time on wait list after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual average applicant time on wait list after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity</i>

<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>				
<b>Activity 23: No Child Left Unsheltered</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity (number). This number may be zero.	Expected households receiving this type of service after implementation of the activity (number).	Actual households receiving this type of service after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase housing choice.	<i>Households receiving this type of service prior to implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Expected households receiving this type of service after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>Actual households receiving this type of service after implementation of the activity will be reported in HACSB's first Annual MTW Report after implementation of the activity.</i>	<i>The outcome will be reported in HACSB's first Annual MTW Report after implementation of the activity</i>

<b>Local Metric: Households Housed Through This Activity</b>				
<b>Activity 23: No Child Left Unsheltered</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households meeting the required criteria housed through this activity.	The number of households meeting the required criteria housed through this activity prior to implementation of this activity is 0.	A benchmark for this activity will be established as the activity approaches implementation.	N/A – Not yet implemented. The number of actual households housed through this activity will be reported in HACSB's first MTW Annual Report after implementation.	N/A – Not yet implemented

## **B. Implementation Plan Update**

This activity was submitted and approved via our FY2014 MTW Annual Plan. HACSB is currently preparing for implementation.

## **C. Implementation Timeline**

1. January 2013: Senator Feinstein proposed challenge to house homeless children in San Bernardino.
2. May 8, 2013: Declared a local emergency through board action, gained board approval of No Child Left Unsheltered, approved changes to related policies in order to revise waiting lists towards homeless children

3. May 2014: HUD approves HACSB's FY 2014 MTW Annual Plan, which proposed the No Child Left Unsheltered activity, which will allow HACSB to allocate 40 Housing Choice Vouchers to eligible families meeting the criteria under No Child Left Unsheltered. .
4. Fall 2014: HACSB is preparing to house families under this activity with PBV assistance by conducting research and developing supporting policies.

#### **D. Proposed Modifications**

Based on reviewing the referrals received for the No Child Left Unsheltered program over the past year, and the local needs as identified in the San Bernardino County Interagency Council on Homelessness 'San Bernardino County Homeless Count and Subpopulation Survey: Final Report' (May 2013), as well as the Federal Register Final Rule language on definition of homelessness as it relates to long-term housing instability (Federal Register /Vol. 76, No. 233 /Monday, December 5, 2011 /Rules and Regulations 76017), HACSB proposes to modify the eligibility criteria to the following:

Families with children must be unsheltered at time of application, and

- (i) Meet the Department of Housing and Urban Development definition for chronic Homeless, and
- (ii) Be endorsed by a recognized homeless service provider, that can attest to the homelessness and housing instability of the family, or
- (iii) Be endorsed by the school district homelessness liaison office (if children are of school age) that can attest to the homelessness and housing instability of the family

Or,

Families with children must be unsheltered at time of application, but do not otherwise qualify as chronically homeless under the HUD definition, but who:

- (i) Have not had a lease, ownership interest, or occupancy agreement in permanent housing at any time during the 90 days immediately preceding the date of application for homeless assistance; and
- (ii) Have experienced persistent instability as measured by two moves or more during the 6 month period immediately preceding the date of applying for homeless assistance; and
- (iii) Can be expected to continue in such status for an extended period of time because of chronic disabilities, chronic physical health or mental health conditions, substance addiction, histories of domestic violence or childhood abuse (including neglect), the presence of a child or youth with a disability, or two or more barriers to employment, which include the lack of a high school degree or General Education Development (GED), illiteracy, low English proficiency, a history of incarceration or detention for criminal activity, and a history of unstable employment.

## Activity 24: Transition for Over-Income Public Housing/Housing Choice Voucher Families

### A. Activity Description

This activity was submitted and approved via our FY2014 MTW Annual Plan. In an effort to create more housing opportunities for families on our Public Housing and Housing Choice Voucher waiting lists, and in recognition of certain families attaining self-sufficiency, families who have an annual income which exceeds 80% of area median income (“over income”) will be given a six month transition period to locate new rental housing. After the six month transition period, families will transition to receiving no housing assistance from HACSB. Public housing families will be required to move and HCV families will have the option of remaining with their current landlord with no assistance or locating alternate housing. Elderly, disabled and homeownership families will be exempt from the six month transition requirement.

Existing families will have the six month transition period commence starting April 1, 2014 while families who become over income after that date will have their six month transition period starting from the effective date of the income change. If, during the six month period, an over income family’s income falls below 80% of the AMI then the family will no longer be considered over income and will not transition off of the program.

Although MTW flexibility is not needed to transition over income families in public housing, it is needed for the Housing Choice Voucher program as well as for families participating in Family Self-Sufficiency under both programs. Upon approval of this activity, the Housing Authority will also update its Admissions and Continued Occupancy Policy (ACOP) to reflect already existing authorization through the Code of Federal Regulations to terminate families over income in the Public Housing program. The Housing Authority also will continue to transition families who have \$0 Housing Assistance Payments off of the program, in alignment with existing regulations. Ultimately, the Housing Authority desires to have similar policies, to the extent possible, between the Housing Choice Voucher and Public Housing programs, and terminating families due to excess income helps achieve that goal. This is particularly important in the Five Year Lease Assistance program, where due to the flat subsidy, families never will reach \$0 HAP and a mechanism must be put in place to transition those families off the program once they reach a self-sufficient level of income.

The following metric will be used to report outcomes for this activity:

<b>SS #8: Households Transitioned to Self-sufficiency</b> <b>Activity 24: Transition for Over-Income Households</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency (increase). For this activity, HACSB defines self-sufficiency as "having an annual income which exceeds 80% of the area median income for the family size".	0 households transitioned to self-sufficiency prior to implementation of the activity.	50 households will be transitioned to self-sufficiency after implementation of this activity.	N/A – Not yet implemented. The number of actual households transitioned to self-sufficiency will be reported in HACSB's first MTW Annual Report after implementation.	N/A – Not yet implemented.

## **B. Implementation Plan Update**

Since the approval of this activity in May 2014, HACSB has begun developing internal implementation procedures, including a Fact Sheet and training for program and non-program staff. The effective date for implementation of this activity is March 1, 2014. The six-month transition period will begin for any assisted household that meets the definition of "over-income" for this activity on or after this date. HACSB has developed an implementation and communication plan that includes discussion with stakeholders prior to the effective date of the activity.

## **C. Implementation Timeline**

5. May 2014: Approval of activity via HACSB's 2014 MTW Annual Plan.
6. July 2014: Revisions to Administrative Plan and Admissions and Continued Occupancy Policy approved by HACSB Board of Commissioners.
7. October – November 2014: Internal process development and training.
8. December 2014 and January 2015: Communication with stakeholders.
9. March 1, 2015: Effective date of activity. Six-month transition period to begin for all households that satisfy the definition of "over-income" criteria on or after this date.

## **D. Proposed Modification**

There are no proposed modifications to this activity.

## **C. Activities on Hold**

### **Activity 3: Alternate Assessment Programs**

This activity was approved in our FY 2009 MTW Annual Plan and was placed on hold in FY 2011.

#### **A. Activity Description**

This activity was approved through HACSB's FY09 MTW Annual Plan and has not yet been implemented. The activity was placed on hold via HACSB's FY10 MTW Annual Plan.

The activity allows HACSB to opt out of the HUD SEMAP and PHAS scoring systems and establish its own program assessment systems designed to measure the quality and timeliness of work performed under the MTW Agreement.

HACSB formally opted out of the PHAS and SEMAP on December 8, 2010, and will continue to retain its high performer status until a new MTW-wide successor system is adopted, at which time HACSB can be fully scored under that system.

#### **B. Reason(s) for On-Hold Status**

At HUD's 2009 Annual MTW Conference we learned that there was an effort to establish an MTW-wide successor to the Section Eight Management Assessment Program (SEMAP) and Public Housing Assessment Program (PHAS) systems currently in place. Rather than develop its own assessment system, HACSB determined that it would instead place this activity on hold until the MTW-wide assessment system is implemented.

#### **C. Plan for Reactivation**

HACSB has been actively involved in a working group consisting of team members from various MTW agencies in an effort to develop a replacement assessment. The working group has been actively working on this project and is close to making a recommendation.

#### **D. Reimplementation Timeline**

The exact date for implementation of the MTW-wide assessment system is not yet known. The system will need to be approved by HUD prior to implementation, and a target date has not yet been set.

#### **E. Proposed Modifications**

No modifications are proposed for this activity.

## **D. Closed Out Activities**

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

#### **A. Approval and Implementation Years**

This activity was approved through the second amendment to our FY 2010 MTW Annual Plan and implemented on April 23, 2010.

## **B. Reason(s) For Close-Out**

On September 15, 2010, HACSB executed a Project Based Voucher contract, and no longer needs the operating subsidy.

## **C. Year the Activity was Closed Out**

This activity was closed out via HACSB's FY12 MTW Annual Plan.

## **Activity 21: Utility Allowance Reform**

### **A. Approval and Implementation Years**

This activity was approved in our FY 2012 MTW Annual Plan; it was never implemented.

### **B. Reason(s) For Close-Out**

This activity allowed HACSB to develop a flat utility allowance schedule for the Housing Choice Voucher Program based on the consumption methodology versus the traditional engineering methodology. However, subsequent development of other programs—namely, our Five Year Lease Assistance Program and the Streamlined Lease Assistance Programs – eliminate the need for a utility allowance. These programs are designed to incorporate the cost of utilities into the subsidy amount without the need to apply a utility allowance separately. As a result, the utility allowance schedule is no longer necessary.

HACSB will continue to monitor the success of the Streamlined Lease Assistance and Five Year Lease Assistance programs but at this time, the Agency has postponed utility allowance reform indefinitely.

### **C. Year the Activity was Closed Out**

This activity was never implemented.

# SECTION V: Sources and Uses of MTW Funds

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## A. MTW Plan: Sources and Uses of MTW Funds

### *Estimated Sources of MTW Funds*

The Housing Authority of the County of San Bernardino (HACSB) is providing its estimated sources of MTW funding for Fiscal Year 2014-2015.

<b>Sources</b>		
<b>FDS Line Item</b>	<b>FDS Line Item Name</b>	<b>Dollar Amount</b>
70500 (70300+70400)	Total Tenant Revenue	\$ 2,982,847
70600	HUD PHA Operating Grants	91,847,336
70610	Capital Grants	3,169,645
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	157,108
71100+72000	Interest Income	-
71600	Gain or Loss on Sale of Capital Assets	-
71200+71300+71310+71400+71500	Other Income	271,108
<b>70000</b>	<b>Total Revenue</b>	<b>\$ 98,428,044</b>

### *Estimated Uses of MTW Funds*

The Housing Authority of the County of San Bernardino (HACSB) is providing its estimated uses of MTW funding for Fiscal Year 2014-2015.

Uses		
FDS Line Item	FDS Line Item Name	Dollar Amount
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating - Administrative	\$ 9,123,298
91300+91310+92000	Management Fee Expense	2,216,254
91810	Allocated Overhead	-
92500 (92100+92200+92300+92400)	Total Tenant Services	712,209
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	1,019,215
93500+93700	Labor	1,423,375
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	1,984,946
95000 (95100+95200+95300+95500)	Total Protective Services	-
96100 (96110+96120+96130+96140)	Total insurance Premiums	272,033
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	81,620
96700 (96710+96720+96730)	Total Interest Expense and Amortization Cost	249,271
97100+97200	Total Extraordinary Maintenance	3,190,245
97300+97350	Housing Assistance Payments + HAP Portability-In	78,155,579
97400	Depreciation Expense	-
97500+97600+97700+97800	All Other Expenses	-
<b>90000</b>	<b>Total Expenses</b>	<b>\$ 98,428,044</b>

**Describe the Activities that Will Use Only MTW Single Fund Flexibility**

HACSB's Local FSS Activity is funded using single-fund flexibility with savings achieved through other MTW activities. HACSB's Community Development Initiatives (CDI) department and its services, which are not a separate MTW activity, are also funded using single-fund flexibility as well as grants awarded to HACSB's affiliate non-profit, Knowledge and Education for Your Success (KEYS).

## B. MTW Plan: Local Asset Management Plan

V.2.Plan.Local Asset Management Plan	
B. MTW Plan: Local Asset Management Plan	
Is the PHA allocating costs within statute?	<input type="checkbox"/> or <input checked="" type="checkbox"/> No
Is the PHA implementing a local asset management plan (LAMP)?	<input checked="" type="checkbox"/> Yes or <input type="checkbox"/>
<p>If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and approved. The narrative shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.</p>	
Has the PHA provided a LAMP in the appendix?	<input checked="" type="checkbox"/> Yes or <input type="checkbox"/>
<p style="text-align: center;">Please see Appendix D.</p>	

## Section VI: Administrative

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- 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. **Public Process** – Appendix B contains information about public review of this plan.
- C. **Planned Ongoing Evaluation of the Demonstration** – As part of the submission of this plan, HACSB does not have any planned or ongoing Agency directed evaluations of the MTW demonstration.
- D. **Annual Statement/Performance and Evaluation Report (HUD 50075.1)** – Attached as Appendix G



# Appendix A: Board Resolution

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Attached on the following pages are –

1. Certificate
2. Board Resolution adopting FY 2015 MTW Annual Plan
3. Certifications of Compliance with Regulations
4. Certification for a Drug Free Workplace



# CERTIFICATE

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I, Daniel Nackerman, President/CEO of the Housing Authority of the County of San Bernardino, hereby certify that the attached Resolution No. 2418 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 June 11, 2014.

June 11, 2014

Date



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Daniel Nackerman, Secretary

**RESOLUTION NO. 2418**

**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**, the Housing Authority of the County of San Bernardino desires to implement the activities in the Fiscal Year 2014-2015 MTW Annual Plan that will increase operational efficiency and innovation; promote economic independence for our families 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 2014 - 2015 Moving to Work Annual Plan.

Adopted: June 11, 2014

Form 50900: Elements for the Annual MTW Plan and Annual MTW Report

Attachment B

**Certifications of Compliance**

**Annual Moving to Work Plan  
Certifications of Compliance**

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

**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 October 1, 2014, 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 published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the PHA conducted a public hearing to discuss the Plan and invited public comment.
2. The PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan.
3. The PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1.
4. 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.
5. The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
6. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan.
7. The PHA will affirmatively further fair housing by examining its 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.
8. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
9. 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.
10. 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.
11. The PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
12. The PHA will comply with requirements 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.
13. 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.
14. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105( a).
15. The PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.

16. 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.
17. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
18. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
19. 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).
20. 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.
21. 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

CA019  
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)

Frank Williams  
Name of Authorized Official

Board Chairman  
Title

  
Signature

June 11, 2014  
Date

\*Must be signed by either the Chairman or Secretary of the Board of the PHA's legislative body. This certification cannot be signed by an employee unless authorized by the PHA Board to do so. If this document is not signed by the Chairman or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.

# 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 ---

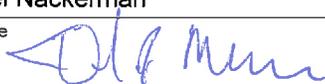
- (1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
- (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved 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 <b>Daniel Nackerman</b>	Title <b>President/CEO</b>
Signature 	Date <b>June 11, 2014</b>

X

# Appendix B: Public Process

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The following steps were taken by HACSB to ensure a thorough public process in the development and adoption of the FY 2015 MTW Annual Plan:

Tuesday, May 6, 2014	Public notices published in local newspapers - San Bernardino County Sun, Black Voice, Daily Press, El Chicano, Inland Valley Daily Bulletin, Precinct Reporter and The Press Enterprise, announcing the public hearings on Tuesday, May 22 and Tuesday, June 5; text included as part of Appendix B
Tuesday, May 6, 2014	Plan posted on HACSB website and available at all HACSB offices throughout the county
Friday, May 2, 2014	Plan presented to Resident Advisory Council Board – comments included
Thursday, May 22, 2014	Public Hearing held; minutes included as part of Appendix B
Thursday, June 5, 2014	Public Hearing held; minutes included as part of Appendix B
Wednesday, June 11, 2014	Approval by Board of Commissioners – Resolution and certificate included in Appendix A

## 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 families in San Bernardino County.

In continuing to develop its MTW program and address community and client needs, HACSB has prepared its Fiscal Year (FY) 2014-2015 MTW Annual Plan. The FY 2014-2015 MTW Annual Plan will be available to the public for review for 30 days starting Tuesday, May 6, 2014 at the following location:

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

The Fiscal Year 2014-2015 MTW Annual Plan is available on HACSB's website at [www.hacsb.com](http://www.hacsb.com) under the "MTW Plans, Reports, and Factsheets" section and any HACSB satellite office.

Notice is hereby given that the Housing Authority of the County of San Bernardino will conduct public hearings on Thursday, May 22, 2014 and on Thursday, June 5, 2014 at 1:30 p.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 MTW 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.

Para recibir copias de este aviso en español, por favor hable al (909) 890-0644.



**HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO  
MOVING-TO-WORK ANNUAL PLAN PUBLIC HEARING**

The Housing Authority of the County of San Bernardino (Housing Authority), California held a public hearing for the Fiscal Year 2014-2015 Moving to Work (MTW) Annual Plan at the Housing Authority's Administration Office at 715 East Brier Drive, San Bernardino, CA 92408 on May 22, 2014 at 1:30 p.m.

**Attendees:**

Maria Razo-Dale, Executive Vice President/CFO

Daniel Nackerman, President/CEO

Lisa Jones, Vice President, Housing Services

Ana Gamiz, Director, Policy & Community Affairs

Rishad Mitha, Director of Housing Communities

Katherine Hartley, Administrative Services Manager

**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 2014-2015 Moving to Work Annual Plan before submission to the Housing Authority's Board of Commissioners for approval. Once approved, 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 6, 2014. The plan was also advertised in the following local newspapers - San Bernardino County Sun, Black Voice, Daily Press, El Chicano, Inland Valley Daily Bulletin, Precinct Reporter and The Press Enterprise, on the Housing Authority's website, and copies were available at all Housing Authority offices, which are located throughout the county.

### **III. Call for Public Comments**

The public hearing convened at 1:30 p.m. with Maria Razo-Dale, Executive Vice President/CFO, presiding. Copies of the Plan were made available for review. Ms. Vickie White, a Homeless Liaison with the City of San Bernardino School District who works with Public Housing program participating families attended the public hearing.

### **IV. Comments**

Ms. White requested additional information regarding the No Child Left Unsheltered and the Streamlined Lease Assistance Programs. Ms. White expressed positive feedback in regards to the two activities and mentioned that she was very pleased that the agency was moving in the direction of trying to assist more families by encouraging families to transition off the programs. Ms. White is currently working with families participating in our Public Housing program and is looking forward to the agency implementing the No Child Left Unsheltered program.



## RESIDENT ADVISORY COUNCIL BOARD MEETING – MAY 2, 2014

The Resident Advisory Council Board was presented with the proposed FY 2014-2015 Moving to Work Annual Plan and proposed new activity at their regular meeting on May 2, 2014. A list of attendees and their comments are provided below –

### List of Attendees

#### **Board Members -**

Linda Brooks	Roxanne Chiappone	Dolores Diaz
Veronica Duran	Anthony Harper	Thomas McLeod
Connie Partida	Priscilla Molina	

#### **HACSB staff –**

Maria Razo-Dale	Marcia Waggoner	Ana Gamiz
Janice Simmons-Rogers	Darlene McIntosh	Pamala Averill
Estella Nunez		

### Opening Remarks

A presentation explaining the Moving to Work designation, its impact on the agency, update on current activities and details on proposed activities was presented by Maria Razo-Dale, Executive Vice President/CFO, at the meeting. The public comment timeline and approval process for the MTW annual plan was explained and the contact information for Maria Razo-Dale was provided for further questions and comments. Maria Razo-Dale explained the agency's long term strategic vision and rent reform activities.

### Comments

The Board was very receptive to the activity update and the proposed activity- Local Blended Subsidy. The Board had questions regarding the transition timeline for any families that would be required to transition off the program under the Transition for Over Income Families as well as detailed questions related to the Streamlined Lease Assistance Program activity. The Board mentioned that it was important to provide opportunities to additional low-income families. The Board also shared their appreciation for the simplification of the rent process through the Streamlined Lease Assistance Program. The Board expressed an extremely favorable response to the proposed Local Blended Subsidy activity.

The members were also invited to the public hearings to be held on May 22, 2014 and June 5, 2014 at 1:30 p.m. at 715 East Brier Road, San Bernardino, CA 92408.

**HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO  
MOVING-TO-WORK ANNUAL PLAN PUBLIC HEARING**

The Housing Authority of the County of San Bernardino (Housing Authority), California held a public hearing for the Fiscal Year 2014-2015 Moving to Work (MTW) Annual Plan at the Housing Authority's Administration Office at 715 East Brier Drive, San Bernardino, CA 92408 on June 11, 2014 at 1:30 p.m.

**Attendees:**

Maria Razo-Dale, Executive Vice President/CFO

Lisa Jones, Vice President, Housing Services

Ana Gamiz, Director, Policy & Community Affairs

Katherine Hartley, Administrative Services Manager

Denise Salas, Administrative Assistant

**V. 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 2014-2015 Moving to Work Annual Plan before submission to the Housing Authority's Board of Commissioners for approval. Once approved, it is submitted to the U.S. Department of Housing and Urban Development (HUD) for final approval.

**VI. 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 6, 2014. The plan was also advertised in the following local newspapers - San Bernardino County Sun, Black Voice, Daily Press, El Chicano, Inland Valley Daily Bulletin, Precinct Reporter and The Press Enterprise, on the Housing Authority's website, and copies were available at all Housing Authority offices, which are located throughout the county.

**VII. Call for Public Comments**

The public hearing convened at 1:30 p.m. with Maria Razo-Dale, Executive Vice President/CFO, presiding. Copies of the Plan were made available for review.

**VIII. Comments**

No members from the public attended this public hearing.



## Appendix C: Capital Fund Program- Five Year Plan & Budget (2015-2019)

### Housing Authority of the County of San Bernardino

AMP 202					
Development	City	Units	Budget	Plan Year	Activities
Cal 19-18 - King Street	San Bernardino	2	20,000	2015	Site Improvement
Cal 19-31 - N. "E" Street	San Bernardino	24	48,000	2015	Misc. Dwelling Improvements
Cal 19-34 - Lynnwood	San Bernardino	15	30,000	2015	Site Improvement
Waterman Gardens	San Bernardino	252	366,113	2015	Redevelopment Activity
Cal 19-14 - Lugo Ave.	San Bernardino	8	32,000	2016	Misc. Dwelling Improvements
Cal 19-19 - W. Evans St.	San Bernardino	24	40,000	2016	Misc. Site Improvements
Cal 19-31 - N. "E" Street	San Bernardino	24	40,000	2016	Misc. Site Improvements
Cal 19-18 - 4th Street	San Bernardino	6	30,000	2016	Misc. Dwelling Improvements
Waterman Gardens	San Bernardino	252	378,193	2016	Redevelopment Activity
Cal 19-34 - Lugo Ave.	San Bernardino	8	64,000	2017	Misc. dwelling Improvements
Cal 19-18 - 4th Street	San Bernardino	6	48,000	2017	Misc. dwelling Improvements
Waterman Gardens	San Bernardino	252	368,405	2017	Redevelopment Activity
Cal 19-32 - Genevieve	San Bernardino	8	60,000	2018	Misc. Dwelling Improvements
Cal 19-18 - 2nd St.	San Bernardino	4	20,000	2018	Site Improvement
Waterman Gardens	San Bernardino	252	330,777	2018	Redevelopment Activity
Cal 19-18 - 4th Street	San Bernardino	6	40,000	2019	Misc. Dwelling Improvements
Cal 19-14 - Lugo Ave.	San Bernardino	8	40,000	2019	Site Improvement
Cal 19-18 N. Berkeley St.	San Bernardino	6	30,000	2019	Site Improvement
Waterman Gardens	San Bernardino	252	362,080	2019	Redevelopment Activity
<b>Total- AMP 202</b>			<b>2,347,568</b>		

AMP 203					
Development	City	Units	Budget	Plan Year	Activities
Cal 19-18 - N. Davidson	San Bernardino	6	30,000	2015	Misc. dwelling Improvements
Cal 19-18 - W. 7th St.	San Bernardino	6	30,000	2015	Misc. dwelling Improvements
Maplewood	San Bernardino	296	91,092	2015	Site Improvements
Maplewood	San Bernardino	296	259,505	2015	Misc. dwelling Improvements
Cal 19-18 - W. 8th St.	San Bernardino	6	20,000	2016	Misc. dwelling Improvements
Cal 19-18 - W. 8th St.	San Bernardino	6	20,000	2016	Site Improvements
Maplewood	San Bernardino	296	105,000	2016	Misc. dwelling Improvements
Maplewood	San Bernardino	296	222,845	2016	Site Improvements
Cal 19-18 - W. 7th St.	San Bernardino	6	60,000	2017	Site Improvements
Maplewood	San Bernardino	296	105,000	2017	Site Improvements
Maplewood	San Bernardino	296	300,000	2017	Misc. dwelling Improvements
Maplewood	San Bernardino	296	150,000	2018	Site Improvements
Maplewood	San Bernardino	296	105,261	2018	Com Center/Office Upgrades
Maplewood	San Bernardino	296	100,000	2018	Interior Improvements/Electrical/Plumbing
Cal 19-18 - "J" St	San Bernardino	2	25,000	2019	Misc. dwelling Improvements
Cal 19-18 - 11th/Turrill	San Bernardino	4	25,000	2019	Misc. dwelling Improvements
Maplewood	San Bernardino	296	166,113	2019	Com Center/Office Upgrades
Maplewood	San Bernardino	296	180,050	2019	Site Improvements
Maplewood	San Bernardino	296	101,000	2019	Misc. dwelling Improvements
Cal 19-18 - W. 8th St.	San Bernardino	6	24,000	2019	Site Improvements
Cal 19-18 - W. 7th St.	San Bernardino	6	24,000	2019	Site Improvements
<b>Total- AMP 203</b>			<b>2,143,866</b>		

## Appendix C: Capital Fund Program- Five Year Plan & Budget (2015-2019)

### Housing Authority of the County of San Bernardino

AMP 205					
Development	City	Units	Budget	Plan Year	Activities
Cal 19-05 - Redlands	Redlands	75	75,000	2015	Site Improvements
Cal 19-05 - Redlands	Redlands	75	137,500	2015	Electrical/Plumbing/Interior Improvements
Cal 19-05 - Redlands	Redlands		25,000	2016	Com Center/Office Upgrades
Redlands - Lugonia Site	Redlands	115	157,167	2016	Redevelopment Activities
Cal 19-05 - Redlands	Redlands	75	60,000	2016	Misc. site Improvements
Cal 19-05 - Redlands	Redlands		24,000	2017	Com Center/Office Upgrades
Cal 19-05 - Redlands	Highland	12	60,000	2018	R/R Roof/Exterior Improvements
Cal 19-32 - E. 9th St.	Redlands		24,500	2018	Com Center/Office Upgrades
Redlands - Lugonia Site	Redlands	115	156,067	2018	Redevelopment Activities
Cal 19-05 - Redlands	Redlands		25,000	2019	Com Center/Office Upgrades

**Total- AMP 205** **744,234**

AMP 206					
Development	City	Units	Budget	Plan Year	Activities
Cal 19-04 - Chino	Colton		15,000	2015	Com Center/Office Upgrades
Cal 19-06 - Chino	Chino	50	100,000	2015	Electrical/Plumbing/Interior Improvements
Cal 19-06 - Chino	Chino	50	85,000	2016	Site Improvements
Cal 19-04 - Colton	Colton	85	125,000	2017	Site Improvements
Cal 19-04 - Colton	Colton	85	85,000	2017	Electrical/Plumbing/Interior Improvements
Cal 19-06 - Chino	Chino	50	20,600	2017	Misc. dwelling Improvements
Cal 19-04 - Colton	Colton	85	100,000	2018	Site Improvements
Cal 19-06 - Chino	Colton	50	43,100	2018	Site Improvements
Cal 19-06 - Chino	Chino	50	40,000	2019	Site Improvements

**Total- AMP 206** **613,700**

AMP 207					
Development	City	Units	Budget	Plan Year	Activities
Cal 19-07, 12 - Barstow	Barstow	114	10,000	2015	Com Center/Office Upgrades
Cal 19-13, 34 - Barstow	Barstow	104	137,500	2015	Electrical/Plumbing/Interior Improvements
Cal 19-07, 12 - Barstow	Barstow	114	134,505	2016	Misc. Dwelling Improvements
Cal 19-13, 34 - Barstow	Barstow	104	149,705	2017	Misc. Dwelling Improvements
Cal 19-07, 12 - Barstow	Barstow	114	80,000	2018	Misc. dwelling Improvements
Cal 19-13, 34 - Barstow	Barstow	104	107,505	2018	Misc. dwelling Improvements
Cal 19-07, 12 - Barstow	Barstow	114	12,500	2018	Com Center/Office Upgrades
Cal 19-07, 12 - Barstow	Barstow	114	65,000	2019	Site Improvements
Cal 19-13, 34 - Barstow	Barstow	104	124,505	2019	Site Improvements

**Total- AMP 207** **821,220**

## Appendix C: Capital Fund Program- Five Year Plan & Budget (2015-2019)

### Housing Authority of the County of San Bernardino

AMP 208					
Development	City	Units	Budget	Plan Year	Activities
Cal 19-32, 19-42	High Desert	6	77,962	2019	Misc. dwelling Improvements
<b>Total- AMP 208</b>			<b>77,962</b>		

AMP 209					
Development	City	Units	Budget	Plan Year	Activities
Cal 19-35	Twentynine Palms	1	-		Section 32 home sold
<b>Total- AMP 209</b>			-		

AGENCY WIDE					
Development Account			Budget	Plan Year	Activities
Operations			0	2015-2019	Operations
Development Activities			582,970	2015-2019	Replacement Housing Factor
Management Improvements			350,000	2015-2019	Self Sufficiency Programs
Administration			316,965	2015-2019	10% limit
Fees & Costs			400,000	2015-2019	A&E/Consultants, Inspection Costs
Audit			10,000	2015-2019	Audit Program
Non-Dwelling Equipment			10,000	2015-2019	Misc equipment
Relocation Costs			150,000	2015-2019	Misc Relocation Costs
Debt Service Pledge			0	2015-2019	CFFP repaid w/ 501-11
Subtotal Annual Agency Wide Activities			1,819,935		
<b>Total - Agency Wide</b>		<b>X5 years</b>	<b>9,099,675</b>		
<b>Grand Total- All AMP's</b>			<b>15,848,225</b>		
Annual Allocation (including RHF)			3,169,645		

<b>Part I: Summary</b>		
<b>PHA Name:</b> HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO	<b>Grant Type and Number</b> Capital Fund Program Grant No: CA 16PO19501-15 Replacement Housing Factor Grant No: CA16R0195015 Date of CFFP:	<b>FFY of Grant: 2015</b> <b>FFY of Grant Approval: 2015</b>

**Original Annual Statement**     
  **Reserve for Disasters/Emergencies**     
  **Revised Annual Statement (revision no: \_\_\_\_\_)**  
 **Performance and Evaluation Report for Period Ending:**     
  **Final Performance and Evaluation Report**

Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) <sup>3</sup>	0			
3	1408 Management Improvements	350,000			
4	1410 Administration (may not exceed 10% of line 21)	316,965			
5	1411 Audit	10,000			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	400,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	236,092			
10	1460 Dwelling Structures	762,505			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures	191,113			
13	1475 Non-dwelling Equipment	10,000			
14	1485 Demolition	160,000			
15	1492 Moving to Work Demonstration				
16	1495.1 Relocation Costs	150,000			
17	1499 Development Activities <sup>4</sup>	582,970			

<sup>1</sup> To be completed for the Performance and Evaluation Report.

<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

<sup>4</sup> RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
**Expires 4/30/2011**

<b>Part I: Summary</b>					
<b>PHA Name:</b> HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO	<b>Grant Type and Number</b> Capital Fund Program Grant No: CA 16PO19501-15 Replacement Housing Factor Grant No: CA16R01950115 Date of CFFP:	<b>FFY of Grant: 2015</b> <b>FFY of Grant Approval: 2015</b>			
<b>Type of Grant</b> <input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:                      ) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
18a	1501 Collateralization or Debt Service paid by the PHA				
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant:: (sum of lines 2 - 19)	3,169,645			
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Activities				
23	Amount of line 20 Related to Security - Soft Costs				
24	Amount of line 20 Related to Security - Hard Costs				
25	Amount of line 20 Related to Energy Conservation Measures				
<b>Signature of Executive Director</b>		<b>Date</b>		<b>Signature of Public Housing Director</b>	
				<b>Date</b>	

<sup>1</sup> To be completed for the Performance and Evaluation Report.

<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

<sup>4</sup> RHF funds shall be included here.

<b>Part II: Supporting Pages</b>								
PHA Name: HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO			Grant Type and Number Capital Fund Program Grant No: CA 16PO19501-15 CFFP (Yes/ No): No Replacement Housing Factor Grant No: CA16R01950115			Federal FFY of Grant: 2015		
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
AMP 202								
Scattered sites	Misc. Sitework/Landscape/504/drainage	1450		50,000				
	Misc. Dwelling/Carpentry Int & Ext	1460		48,000				
Cal 19-2	Misc. Sitework/Landscape/504/drainage	1450		20,000				
	Misc. Dwelling/Carpentry Int & Ext.	1460		20,000				
	A&E & Pre-development fees & costs	1430		80,000				
	Demolition	1485		160,000				
	Relocation Costs	1495.1		75,000				
	Office/Community facility upgrades	1470		166,113				
AMP 203 Scattered	Misc. Sitework/Landscape/504/drainage	1450		0				
	Misc. Dwelling/Carpentry Int & Ext	1460		60,000				
Cal 19-3	Misc. Sitework/Landscape/504/drainage	1450		91,092				
	Misc. Dwelling/Carpentry Int & Ext	1460		259,505				
	A&E - Rehab planning	1430		100,000				
	Office/Community facility upgrades	1470		0				
AMP 205	Misc. Dwelling/Carpentry Int & Ext	1460		137,500				
Cal 19-5	Misc. Sitework/Sidewalks/504	1450		75,000				
	Office/Community facility upgrades	1470		0				

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>2</sup> To be completed for the Performance and Evaluation Report.

<b>Part II: Supporting Pages</b>								
PHA Name: HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO			Grant Type and Number Capital Fund Program Grant No: CA 16PO19501-15 CFFP (Yes/ No): No Replacement Housing Factor Grant No: CA16R01950115			Federal FFY of Grant: 2015		
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
AMP 205	A&E, Misc.	1430		40,000				
Cal 19-1,8,9	A&E Construction Documents	1430		140,000				
	Demolition	1485		0				
	Relocation Costs	1495.1		75,000				
	Misc. Site/REAC	1450		0				
	Misc. Dwelling/REAC	1460		0				
AMP 206	A&E Construction Documents	1430		40,000				
AMP-Wide activity	Misc. Site/REAC	1450		0				
	Misc. Dwelling /REAC	1460		100,000				
Cal 19-4	Office/Community facility upgrades	1470		15,000				
AMP 207	Office/Community facility upgrades	1470		10,000				
AMP-Wide activity	Misc. Site/REAC	1450		0				
	Misc. Dwelling/REAC	1460		137,500				
AMP 208	Misc. Dwelling/REAC	1460		0				
AMP 209	Misc. Dwelling/REAC	1460		0				
				0				
PHA - Wide activity	Audit	1411		10,000				
	Non-dwelling Equipment	1475		10,000				

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>2</sup> To be completed for the Performance and Evaluation Report.

<b>Part III: Implementation Schedule for Capital Fund Financing Program</b>					
PHA Name: HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO				Federal FFY of Grant: 2015	
Development Number Name/PHA-Wide Activities	All Fund Obligated (Quarter Ending Date)		All Funds Expended (Quarter Ending Date)		Reasons for Revised Target Dates <sup>1</sup>
	Original Obligation End Date	Actual Obligation End Date	Original Expenditure End Date	Actual Expenditure End Date	
AMP 202	03/11/2017		03/11/2019		
AMP 203	03/11/2017		03/11/2019		
AMP 205	03/11/2017		03/11/2019		
AMP 206	003/11/2017		03/11/2019		
AMP 207	03/11/2017		03/11/2019		
AMP 208	03/11/2017		03/11/2019		
PHA-wide	03/11/2017		03/11/2019		

<sup>1</sup> Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.



## APPENDIX E: Local Asset Management Program

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The First Amendment to the Standard MTW agreement executed on May 21, 2009 allowed HACSB to design and implement a local asset management program. The program should include a description of how it is implementing property based management, budgeting, accounting and financial management and any deviations from HUD's asset management requirements. In our FY 2010 MTW Annual Plan, we first described our asset management program and amended it through our FY 2010 MTW Plan – Amendment 3 approved on September 15, 2010. Prior to our designation as an MTW agency, HACSB developed a comprehensive 30 year strategic plan in 2008 that serves as a guiding map in achieving our mission, vision and goals. Some of the goals of our plan include helping our participants achieve self-sufficiency, providing timely housing assistance to needy families, increasing housing options and strengthening our agency, our residents and our community. As good stewards of taxpayer's dollars, we pride ourselves in achieving administrative efficiency while providing the best quality service to the families that we serve. Upon closer examination, we feel that the indirect cost rate methodology will best serve our mission, versus our current fee-for-service methodology. In accordance with the federal Office of Management and Budget (OMB) Circular A-87, we elect to establish a cost allocation methodology to allocate direct and indirect costs and establish an indirect cost rate. The cost allocation plan along with the indirect cost rate is described in detail below and we agree to justify the indirect cost rate established.

HACSB did a detailed examination of our current agency structure including our Central Office Cost Center (COCC) structure and confirmed how intertwined our Central Office was to the agency as a whole. The work done by various departments has resulted in agency wide solutions and it is our combined efforts that will help us achieve our goals. This strengthens the need for an indirect cost rate methodology that allows the flexibility to combine resources and achieve inter-department solutions that are represented as a simple unified solution for the families that we serve and our agency. We wish to keep the funding and administrative processes indistinguishable in the eyes of our customers and hope that our collective efforts at various levels provide the best services, the best support, and the best housing choices for our families. This has led to a centralized effort in many services like information technology, community affairs, administrative services, waiting list and development. Details on some of our departments are provided below -

**Information Services (I.S.)** – Our centralized I.S. department is responsible for the network and server administration, database and software administration, telecommunications and software and report developments for the entire agency. This is done with a dedicated team of four individuals that support 154 agency computers in 10 locations throughout our county. They respond to an average of 50 help desk tickets a week that result in around 20 site visits per week. In addition, in February 2010, we were awarded the competitive BTOP grant to provide high speed technology access to underserved communities. Post grant ending, HACSB has continued to fund these centers, which currently consist of four (4) computer centers that are served by three (3) computer technicians and host 24 personal computers and 16 Apple Mac's. Our IS team provides the necessary technical support and manages the computer centers. Our agency partnered with the Career Institute to provide free career, education and job counseling services at these centers.

**Community Affairs** – Our centralized community affairs department assists in making and strengthening partnerships throughout the County to leverage services and programs to assist our residents in achieving self-sufficiency. These partners include schools, non-profit community organizations, health and human service providers, financial institutions, elected officials, and so forth. Through these efforts,

## APPENDIX E: Local Asset Management Program

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our housing sites are able to sustain services such as child care, financial literacy courses, health services, parenting courses, to name a few examples.

In an effort to outreach to services of greatest need among our residents, in 2010, we partnered with Loma Linda University (LLU) to conduct a detailed needs assessment for one of our Public Housing communities- Maplewood Homes Community (formerly known as Medical Center, 296 units) to determine the appropriate partners that could serve our residents based on resident input and professional analysis. As a result, LLU staff and students will assist with follow up by providing on-site case work management and varying topic workshops in response to the assessment findings.

As monies from the federal government continue to deplete for resident services, HACSB was proactive in 2011 by establishing an affiliate nonprofit K.E.Y.S. (Knowledge Education for Your Success) to support resident and community initiatives and client self-sufficiency activities. The mission of KEYS is to empower low income families in San Bernardino County, to unlock their potential for success. Our efforts are not restricted to resident self-sufficiency, and KEYS is an example of the additional work that we have accomplished to improve the quality of life for our residents.

Specifically, in an effort to improve the quality of life for residents, HACSB acknowledged the serious health issues caused by second hand smoke and partnered with the County Department of Public Health to search for viable solutions. Though our vast efforts of educating our residents on the harmful effects of smoking, and surveying them for their feedback, we have transitioned several of our affordable housing sites to 100% smoke free developments. This was an effort achieved through the strength of our partnership and the educational health resources provided to our residents.

**Administrative Services** – The Administrative Services department assists other offices by providing oversight on matters pertaining to the agency’s compliance with state and federal requirements. As an example, this department works to ensure compliance with annual filings of Statement of Economic Interests, the Brown Act, Public Records Requests, Fair Housing and Americans with Disabilities Act (ADA). An agency-wide Needs Assessment is currently being conducted to ensure compliance with current ADA requirements, which will include input from outside agencies and a plan to address any deficiencies. This department also handles our legal issues and is our liaison between the agency and the legal team.

**Development** – Our centralized Office of Real Estate Development team is responsible for all Real Estate acquisition, rehabilitation, redevelopment and new construction projects. Our dedicated project managers often eliminate the costs associated with outside development and/or construction management consultants. The staff is continuously available to all AMPS as a technical, as well as planning and implementation resource for non-routine maintenance and emergency rehabilitation projects. The Department manages the completion of all Physical Needs Assessments and due diligence reports for the entire portfolio of HACSB residential developments. This department also oversees all of the Capital Fund improvement and rehabilitation projects within the public housing portfolio and administers all grant funding and debt financing that can be associated. Lately, the development team has been actively involved in implementing energy efficiency projects and in 2010 was awarded a \$1.84 million grant at our Maplewood Homes Community (leverage funds for the CFRC grant). This project is currently under construction. Finally, Development administers a very successful homeownership program that has helped 135 families overcome their barriers and achieve the American dream of

## APPENDIX E: Local Asset Management Program

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owning a home. It is a program utilizing a variety of methods to achieve goals for our clients, including Section 32 (converted public housing), Section 8 Homeownership, and a Community Land Trust.

**Procurement-** Our centralized procurement department is responsible for agency wide contracts enable higher cost savings and fiscal prudence. Centralized duties include the oversight of the contract needs of the sites, management of the bid process, vendor communication, and contract compliance. The sites are responsible for scheduling work, approving invoices, working with the centralized procurement staff to define scopes of work, and ensuring the work is done properly.

### **Local Asset Management Implementation**

**Leadership** - Our local asset management program will be led by a leadership team consisting of representatives from the following departments: housing programs, development, finance, administrative services, human resources, information technology, procurement and community affairs and policy. They will meet on a biweekly basis to review the combined efforts and ensure the agency is striving to achieve its long-term objectives. This team is also responsible for our Strategic Plan and charters the path annually while ensuring significant milestones are met.

**Project-based Management** - We expect that all of our programs, regardless of funding source, to be accountable for project-based management, budgeting, and financial reporting. We apply the same expectation of aligning responsibility and accountability to those services that are managed centrally.

HACSB has been operating under project-based budgeting and accounting practices since 2006. We have developed systems and reports to facilitate the onsite management and analysis of budgets, expenses, rent collection and receivables, and purchasing. In accordance with HUD Asset Management guidance, HACSB decentralized its maintenance program in 2008 and each AMP was assigned maintenance personnel, depending on the size and maintenance requirements of the properties in the AMP. HACSB has a decentralized purchasing model for the acquisition of goods. Sites staff use a simple purchasing system that enables them to be able to purchase goods directly from their pool of vendors while still enabling management staff to track spending habits. While the acquisition of goods is decentralized, the agency has adopted a hybrid approach to the acquisition of its services. Centralized duties include the oversight of the contract needs of the sites, management of the bid process, vendor communication, and contract compliance. The sites are responsible for scheduling work, approving invoices, working with the centralized procurement staff to define scopes of work, and ensuring the work is done properly.

**Cost Allocation Approach** - Under OMB Circular A-87, there is no universal rule for classifying certain costs as either direct or indirect under every accounting system. A cost may be direct with respect to some specific service or function, but indirect with respect to the Federal award or other final cost objective. Therefore, it is essential that each item of cost be treated consistently in like circumstances, either as a direct or an indirect cost. Consistent with OMB Circular A-87 cost principles, HACSB has identified all of its direct costs and segregated all its costs into pools, as either a direct or an indirect cost pool.

**Direct Costs** - OMB Circular A-87 defines direct costs as follows: Direct costs are those that can be identified specifically with a particular final cost objective. HACSB's direct costs include, but are not limited to:

## APPENDIX E: Local Asset Management Program

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- Contract costs readily identifiable with delivering housing assistance to low-income families.
- Housing Assistance Payments, including utility allowances, for vouchers
- Utilities
- Insurance
- Property-based audits
- Staff training
- Interest expense
- Information technology fees
- Portability administrative fees
- Rental Assistance department costs for administering Housing Choice Vouchers including inspection activities
- Operating costs directly attributable to operating HACSB-owned properties
- Fleet management fees
- Maintenance services for unit or property repairs or maintenance
- Maintenance services include, but are not limited to, landscaping, pest control, decorating and unit turnover
- Community Services department costs directly attributable to tenants services
- Gap financing real estate transactions
- Acquisition costs
- Demolition, relocation and leasing incentive fees in repositioning HACSB-owned real estate
- Homeownership activities for low-income families
- Leasing incentive fees
- Certain legal expenses
- Professional services at or on behalf of properties or a portfolio, including security services
- Extraordinary site work
- Any other activities that can be readily identifiable with delivering housing assistance to low-income families
- Any cost identified for which a grant award is made. Such costs will be determined as HACSB receives grants

**Indirect Costs** - OMB Circular A-87 defines indirect costs as those (a) incurred for a common or joint purpose benefiting more than one cost objective, and (b) not readily assignable to the cost objectives specifically benefitted, without effort disproportionate to the results achieved. HACSB's indirect costs include, but are not limited to:

- Executive
- Communications
- Certain legal expenses
- Development

## APPENDIX E: Local Asset Management Program

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- Finance
- Purchasing
- Human Resources
- Housing Finance and Asset Management
- Administration staff and related expenses of the Housing Operations and Rental Assistance Departments that cannot be identified to a specific cost objective.

**Indirect Services Fees** - HACSB has established Indirect Services Fees based on anticipated indirect costs for the fiscal year. Any indirect costs incurred by HACSB in support of its projects and programs will be incurred by the Central Office Cost Center (COCC) and charged out to the programs in the form of a fee. The four fees are:

- Asset Management Fees
- Management Fees
- Bookkeeping Fees
- Indirect Services Fees

**Asset Management Fees** – This fee was described in Plan Year 2010 and was modified through our third amendment to the FY 2010 MTW Annual Plan. The Asset Management Fee uses our fungibility to transfer funds among AMPS and allows us to charge an asset management fee, regardless of whether a project has excess cash. The COCC will continue to charge the Asset Management to the AMPS at the HUD's determined rate of \$10 per ACC unit

**Management Fees** – The COCC will continue to charge the Management Fee at the HUD's determined rate of \$70.64 per units leased to the AMPS and 20% of Administrative Fees for Housing Choice Voucher program.

**Bookkeeping Fees** - The COCC will continue to charge the Bookkeeping Fee at the HUD's determined rate of \$7.50 per unit leased to the AMPS and the Housing Choice Voucher program.

**Indirect Service Fees** – Before calculating the per unit indirect service fees, HACSB indirect costs are offset by designated revenue. Offsetting revenue includes 10 percent of the MTW Capital Fund Grant award, Asset Management Fees, Management Fees, Bookkeeping Fees, and other revenues. A per unit cost is calculated using the remaining net indirect costs divided by the number of units and the number of leased vouchers. For the 2015 budget, the per-unit per month (PUM) cost is \$0.

Per the requirements of OMB Circular A-87, the indirect services fees are determined in a reasonable and consistent manner based on total units and/or leased vouchers. The fees are calculated as a per-housing-unit or per-leased-voucher per month charged to each program. HACSB will annually review all of its indirect service fees charges in relation to actual indirect costs and will incorporate appropriate adjustments in indirect service fees for the subsequent year, based on this analysis.

**Differences between HUD Asset Management and HACSB LAMP** - Under the First Amendment, HACSB is allowed to define costs differently than the standard definitions published in HUD's Financial Management Guidebook pertaining to the implementation of 24 CFR 990. HACSB is required to describe

## APPENDIX E: Local Asset Management Program

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in this MTW Annual Plan differences between our Local Asset Management Program and HUD's asset management program. Below are the three key differences:

- HACSB determined to implement an indirect service fee that is much more comprehensive than HUD's asset management system. HUD's asset management system and fee for service is limited in focusing only on a fee for service at the Low Income Public Housing (LIPH) property level. HACSB's LAMP is much broader and includes local housing and other activities not found in traditional HUD programs. HACSB's LAMP addresses the entire HACSB operation.
- HUD's rules are restrictive regarding cash flow between projects, programs, and business activities. HACSB intends to use its MTW resources and regulatory flexibility to move its MTW funds and project cash flow among projects without limitation and to ensure that our operations best serve our mission, our LAMP cost objectives, and ultimately the low-income people we serve.
- HACSB charges an Asset Management Fee to all AMPS regardless of excess cash by each AMP by the use of our fungibility.

**FDS Reporting** – HACSB will continue to report on the HUD's established deadlines following the same format as previous years using the Asset Management with COCC/ elimination.

# Appendix F: Non-MTW Related Information

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## Special Purpose Programs –

In addition to the MTW Voucher Program, HACSB administers other voucher programs and special programs, such as Mainstream, HOPWA, VASH and Shelter Plus Care.

 **Mainstream** – This program is designed to provide rental assistance to persons with disabilities to enable them to lease affordable private housing of their choice. At the beginning of FY 2014, we were providing assistance to 98 families through this program.

 **Housing Opportunities for Persons with AIDS (HOPWA)** - HACSB has partnered with Foothill Aids Project to offer rental assistance and supportive services to persons diagnosed with HIV/AIDS. The Foothill Aids Project assesses the applicant's duration of participation in their case management program and facilitates location of suitable housing to meet their clients' needs. At the beginning of FY 2014, we were providing assistance to 36 families through this program.

 **Veteran's Affairs Supportive Housing (VASH)** - HACSB and Veterans Administration Medical Center have partnered to provide rental vouchers and supportive services to eligible homeless veterans with severe psychiatric or substance abuse disorders. The program goals include promoting maximal Veteran recovery and independence to sustain permanent housing in the community for the Veteran and the Veteran's family. At the beginning of FY 2014, we were providing assistance to 132 families through this program.

 **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. At the beginning of FY 2014, we were providing assistance to 51 families through this program.

 **Shelter Plus Care Programs (S + C)** - The Shelter Plus Care Program provides rental assistance for hard-to-serve homeless persons with disabilities in connection with supportive services funded from sources outside the program. HACSB currently administers the following S + C vouchers:

- **Stepping Stones (S + C)** - This program provides rental assistance for hard to serve homeless persons with disabilities in connection with supportive services funded through the Department of Behavioral Health (DBH). Under the program requirements, HACSB provides the housing services based on referrals from DBH, which matches the housing funds by providing supportive services. At the beginning of FY 2014, we were providing assistance to 39 families through this program.
- **New Horizons (S + C)** – This program is offered through the Department of Behavioral Health for homeless individuals/families that are currently receiving services from the

department. It was implemented in 2008 with expected expiration in August 2014 due to a one year extension on the grant term. At the beginning of FY 2014, we were providing assistance to 150 families through this program.

- ***Good Samaritan (S + C)*** – This program is offered through the Department of Behavioral Health for chronically homeless individuals that are currently receiving services from the department. It implemented in 2008 with expected expiration in August 2014 due to a one year extension on the grant term. At the beginning of FY 2014, we were providing assistance to 29 families through this program.
- ***Laurelbrook Estates (S + C)*** – This program assists individuals or families experiencing mental illness and homelessness and is a Project Based S+C voucher subsidy tied to designated scattered sites throughout the County of San Bernardino. The supportive services are offered through the Department of Behavioral Health. At the beginning of FY 2014, we were providing assistance to 22 families through this program.
- ***Project Gateway (S + C)*** – HACSB formed a partnership with Ontario Housing Authority, Mercy House Living Centers Inc. and Department of Behavioral Health (DBH) to provide permanent housing in conjunction with long term supportive services including mental health care, employment, self-sufficiency etc. to our homeless community. At the beginning of FY 2014, we were providing assistance to 10 families through this program.
- ***Cornerstone (S + C)*** - This program implemented in 2012 and is offered through the Department of Behavioral Health for homeless individuals or families. At beginning end of FY 2014, we were providing assistance to 21 families through this program.
- ***Whispering Pines (S + C)*** - This program implemented in 2012 and is offered through the Department of Behavioral Health for homeless individuals. At the beginning of FY 2014, we were providing assistance to 16 families through this program.
- ***Lantern Woods (S + C)*** - This program implemented in 2012 and is offered through the Department of Behavioral Health for homeless individuals. At the beginning of FY 2014, we were providing assistance to 10 families through this program.

## **HACSB College Scholarship Program**

For 22 years, the Housing Authority has been proud to assist eligible participants in achieving their higher educational goals through scholarships. To date, HACSB has awarded 261 students with \$180,250 in scholarships. Current participants/residents in the Housing Services Program (Housing Choice Voucher programs), Affordable Housing Program (Public Housing programs) or other HACSB affordable housing communities are eligible to apply. Students need to be accepted by or currently attending a four-year college/university, community college, or technical/vocational school. Students attending a four-year college or university receive a \$1,500 scholarship while community and technical/vocational

students receive a \$750 scholarship. The Housing Authority uses non-public funds to promote educational success among their participants.

In 2013 eight students were awarded scholarships to assist them with their college expenses. The recipients are attending one of the following colleges/universities: Biola University; California State University, San Bernardino; Prairie View A&M University; San Bernardino Valley College; Norco Community College; and University of California, Riverside. Their areas of study include the following majors: accounting, business administration, biology (pre-med), human development, human nutrition/food, and nursing.

## **Knowledge & Education for Your Success (KEYS)**

KEYS is a 501(c)(3) nonprofit corporation created in 2009 by HACSB to consolidate HACSB's array of supportive services, centralize strategic community partnership development, and to provide additional support and services for economically disadvantaged families and children, including the 30,000 persons assisted by HACSB. The mission of KEYS is to empower low-income individuals and families in San Bernardino County and to unlock their potential for success. Our vision is for individuals and families to have the skills and resources necessary to thrive.

KEYS utilizes a "collective impact" strategy which aligns with a county wide approach called the Launch Initiative. KEYS has become a leader for the Launch Initiative, which is a shared vision to align key leaders in education, safety, housing, faith, nonprofit, and business sectors to: 1) stabilize housing, 2) develop supportive services, 3) provide career development opportunities, and 4) develop long term career placement options for families so they move from poverty to prosperity. KEYS uses an evidenced based "Families Strengthening" Case Management model to help families reach their full potential. Through KEYS services, our goals are to assist families to become: 1) economically empowered and self-sufficient; 2) actively engaged in community life; 3) empowered to access community resources; and 4) have increased protective factors and resiliency.

KEYS has created two Family Resource Centers in HACSB's largest Affordable Housing communities, Maplewood Homes and Waterman Gardens, both within the City of San Bernardino. KEYS staff also work to provide case management services throughout the county for residents in the Five Year Lease Assistance Program and Maplewood Homes families participating in the Pilot "Work" Requirement. KEYS staff works in partnership with the Community Development Initiatives Department of HACSB to streamline the intake and referral process so residents have opportunities to receive supportive services throughout their residency within HACSB. Due to limited capacity, the initial families assisted are those participating in the Five Year Lease Assistance and Pilot Work Requirement Programs.

KEYS also receives external grant funding to support all low income families throughout the county. Recently KEYS was awarded the Supportive Services for Veteran Families (SSVF) grant to promote housing stability among very low-income Veteran families who reside in or are transitioning to permanent housing. SSVF providers can assist HUD-VASH households through temporary financial assistance (i.e. security deposit, rental arrears, utility assistance) and supportive services for non-Veteran household members. We have also uniquely partnered with faith based groups, nonprofits, and

businesses to help furnish beds, clothes, furniture, and other household items once homeless veterans and/or families have been placed into permanent housing through the No Child Left Unsheltered Program through HACSB and the KEYS SSVF program.

Together KEYS, HACSB, and our many community partners are working diligently to change the trajectory for families living in poverty and provide a safe and unique environment to help them thrive and become self-sufficient.

## Other Affordable Rental Housing

HACSB owns 1,199 Non-HUD residential units along with 4 commercial units (Frankish Building). Many of those units are affordable as a result of public funds, such as HOME and Redevelopment Housing Set-Aside funds. For more information please refer to the Authority Owned Housing Stock under the Housing Stock Information in Section II: General Housing Authority Operating Information of this report.

**Affiliate Non-Profit** – Housing Partners I, Inc. (HPI, Inc.) was created in 1991 to develop, own, and manage affordable housing as an affiliate non-profit of HACSB. HPI, Inc.’s designation as a Community Housing Development Organization (CHDO) allows it to apply for and receive HOME funds from the County of San Bernardino, Department of Community Development and Housing and other cities for the acquisition, development and rehabilitation of housing units. With over 20 years of housing development experience behind it, HPI, 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, Inc. controlled entity that owns 211 units throughout the County of San Bernardino. HPI Inc. and its affiliates own a total of 617 units, detailed in the list below.

Affiliate Non-Profit			
Property Name	City	Units	Entity
Acacia Property	Fontana	28	HPI Property Acquisition LLC
Desert Village	Victorville	46	HPI Property Acquisition LLC
Kendall Drive Apts.	San Bernardino	37	HPI Property Acquisition LLC
Kendall Park Apts.	San Bernardino	52	HPI Property Acquisition LLC
Robert O. Townsend	Montclair	48	HPI Property Acquisition LLC
Vista del Sol	Redlands	71	HPI, Inc. Portfolio
Scattered Sites – Region 1	Loma Linda, Redlands, Yucaipa, Bloomington, Colton, Fontana, Rancho Cucamonga	97	HPI, Inc. Portfolio
Scattered Sites – Region 2	Ontario, Montclair, Chino	107	HPI, Inc. Portfolio
Scattered Sites – Region 3	Adelanto, Apple Valley, Hesperia, Victorville, Joshua Tree, 29 Palms, Yucca Valley	131	HPI, Inc. Portfolio
<b>TOTAL UNITS</b>		<b>617</b>	

# Appendix G: Fact Sheets

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At HACSB, communication and education of team, participants, residents, landlords and community is critical to the success of our innovative programs. We have attached some of our sample fact sheets which are handy references about our programs and services. These fact sheets are posted online at [www.hacsb.com](http://www.hacsb.com) and are also available at our offices.



# HACSB FACTSHEET

## Moving to Work | OVERVIEW

### WHO WE ARE

The Housing Authority of the County of San Bernardino (HACSB) is one of the nation's most progressive housing authorities in the Country. Located in the largest geographical county in the contiguous United States, we are the largest provider of affordable housing in the County. We proudly manage programs with approximately 11,000 housing units and vouchers combined to serve an excess of 30,000 people, most of whom are seniors, disabled individuals, veterans, and children. We are also very active in real estate development, resident self-sufficiency support, and first-time homebuyer attainment.

As a non-traditional housing authority, our agency's success is a result of our business approach to strategic planning and delivery of services. As a high



performing and innovative agency, HACSB was designated as a Moving to Work (MTW) Agency by the U.S. Department of Housing and Urban Development (HUD) in 2008. As a result, we have transformed our agency by executing innovative initiatives based on the three key MTW objectives: saving taxpayer dollars through efficient work; helping our families achieve economic independence; and ensuring a family's freedom of housing choice. We have also adopted and achieved, on an ongoing basis,

the performance-based evaluation system from the 'Bipartisan Policy Center' to improve housing quality, increase delivery efficiency, enable independent lives, create economic self-sufficiency, and deconcentrate poverty. To date we have developed 24 MTW "activities", 22 of which have been approved by HUD in our MTW annual plans. The table below shows a current list of activities:

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR	STATUS
Activity 1	Single Fund Budget	Administrative Efficiency	FY 2009	Ongoing
Activity 2	Strategic Investment Policies	Administrative Efficiency	FY 2009	Ongoing
Activity 3	Alternate Assessment Program	Administrative Efficiency	FY 2009	On Hold
Activity 4	Biennial Recertifications	Administrative Efficiency	FY 2009	Ongoing
Activity 5	Local Verification Policies	Administrative Efficiency	FY 2009	Ongoing
Activity 6	Elimination of Assets	Administrative Efficiency	FY 2009	Ongoing
Activity 7	Controlled Program Moves	Administrative Efficiency	FY 2009	Ongoing
Activity 8	Local Policies for Portability	Economic Independence	FY 2009	Ongoing
Activity 9	Elimination of Earned Income Disallowance	Economic Independence	FY 2009	Ongoing
Activity 10	Minimum Rent	Economic Independence	FY 2009	Ongoing
Activity 11	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009	Ongoing
Activity 12	Local Payment Standards	Expanding Housing Opportunities	FY 2009	Ongoing
Activity 13	Local Inspection Standards	Administrative Efficiency	FY 2010	Ongoing
Activity 14	Local Asset Management Program	Administrative Efficiency	FY 2010	Ongoing
Activity 15	Pilot Work Requirement	Economic Independence	FY 2010	Ongoing
Activity 16	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010	Complete
Activity 17	Local Income Inclusion	Economic Independence	FY 2011	Ongoing
Activity 18	Property Management Innovation	Administrative Efficiency	FY 2011	Ongoing
Activity 19	Local FSS program	Economic Independence	FY 2011	Ongoing
Activity 20	Five Year Lease Assistance Program	Economic Independence	FY 2011	Ongoing
Activity 21	Utility Allowance Reform	Administrative Efficiency	FY 2012	Complete
Activity 22	Streamlined Lease Assistance Program	Administrative Efficiency	FY 2013	In Development
Activity 23	No Child Left Unsheltered	Economic independence	FY 2014	Pending HUD Approval
Activity 24	Transition for Over-Income Families	Economic Independence	FY 2014	Pending HUD Approval

## MOVING TO WORK OVERVIEW

In 1996, Congress enacted the Moving to Work (MTW) demonstration program. The purpose is to provide public housing authorities (PHAs) the opportunity to design and test innovative, locally-designed strategies that use Federal dollars more efficiently, help residents find employment and become self-sufficient, and increase housing choices for low-income families. MTW gives PHAs exemptions from many existing public housing and voucher rules and more flexibility with how they use their Federal funds. MTW PHAs are expected to use the opportunities presented by MTW to inform HUD about ways to better address local community needs. MTW agencies are not given additional funding to administer their various initiatives. Currently, there are 39 Housing Authorities participating in the program out of 3,200 Housing Authorities nationwide.

## MOVING TO WORK SUCCESSES

Throughout the years, there has been an ongoing negative sentiment about participating MTW agencies due to lack of knowledge as to status of results; however, we have found most are based on misinformation. Some of the expressed concerns include: MTW agencies serve less families; and self-sufficiency activities are forcing low-income families out of affordable housing programs. We cannot speak for other MTW agencies, but we have had a great deal of success with most of our activities and the misconceptions to date do not apply at our agency.

We are proud to report some of the results from some of our endeavors:

- **Saving Taxpayers' Dollars:** We have continued to benefit from substantial operational efficiencies through developed MTV activities, with new business practices such as checking incomes every two years instead of annually a more friendly and efficient methods of tracking resident information. As a result of these activities, in FY 2013 the total staff time saved was over 10,000 hours.
- **Serving More Families:** The savings helped us assist 680 additional families in our Housing Choice Voucher Program (to 8,421), a 9% increase from the first year as an MTW agency; despite the on-going federal funding cuts to our programs. Currently our lease rate is over 101% in the HCV program, and 99% in the Affordable Housing program.

- **Addressing Local Needs:** Given the vast geographic area and demographic differences in our 20,000 square mile county, HUD's previous payment standard was not an accurate rental market representation. Therefore, an independent third party firm conducted a detailed rental analysis and created nine rental submarkets with updated payment standards; this resulted in one of our activities, Local Payment Standards. Since the implementation of this activity, our per unit costs have reduced from \$730 to \$679. The projected annual cost savings is \$5.6 million – enough to house 600 additional families and/or mitigate funding cuts. This also empowered our families to move to areas with better schools, access to transportation and/or job opportunities that may have been previously inaccessible. As an example, we have seen a 4% increase of families moving to the West Valley, a lower poverty area.
- **Working Families:** As a requirement of one of our activities, we have implemented a “work” requirement for all residents at our Maplewood Homes affordable housing community on January 1, 2013 and August 1, 2010 for all incoming ports. This program requires all current and future adult household members between the ages of 18 and 61 (excluding elderly and/or disabled individuals) to participate for a minimum of 15 hours per week in “work” activities. The definition of work includes: volunteerism, educational and training programs, drug and/or mental health treatment, and paid employment.
- **Limiting Housing Assistance to Serve More Families:** The Five Year Lease Assistance Program, implemented on January 1, 2012, is a five year term limit activity for all new individuals/families (except seniors and disabled individuals) pulled from the voucher program waiting list. Families in this program receive a flat rental subsidy which is equal to the lesser of 50% of the contract rent or 50% of the payment standard for the given submarket. As we backfill through attrition and limit the years families can receive housing assistance, we hope to promptly serve the 28,000 applicants on our waiting lists. To assist in families' self-sufficiency efforts, staff works closely with each adult to develop an Individual Training and Services Plan (ITSP) which serves as

a guide for self-sufficiency goals. There are currently over 700 households in the program, in these households 937 adults have completed an ITSP.

- **Assisting Families to Achieve Self-Sufficiency:** Made possible through our partnership with Loma Linda University (LLU), LLU conducted several needs assessments of our residents and determined the top needs of our residents, including: mental health services, family counseling, and case management. As a follow up, LLU is providing these types of services for our families to overcome some of their personal barriers. Helping families achieve economic independence is also a shared priority with our partner, the County's Workforce Development Department. Through their expertise and the needs of our residents, we have recently partnered to have an onsite Workforce Development Specialist work directly with our clients to receive employment training and placement assistance. This individual works directly with our families during the five year term limit and those at Maplewood Homes in the Pilot "Work" Requirement program. Such activities that promote administrative efficiency have also enabled staff to focus on other areas. For example, in 2010, HACSB created Community Developments Initiative Department, this department works closely with our families to assist them in reaching their personal and professional goals towards economic independence.
- **Assimilating to the Private Rental Market:** In 2012, we implemented our Property Management Innovation activity at our public housing sites. The goal of this activity is to implement property management principles that mirror the private sector. Through this activity we look to: improve the quality of housing units; help residents familiarize themselves with private sector property management practices; and increase management efficiency. Since program implementation in January 2012, we have reduced our average vacancy turnaround costs from \$3,793 to \$3,600, decreasing costs by 5%. Late fees increased from \$20 to \$50, and as a result, there has been 60% decrease in the number of late fees charged to residents.

## Spotlight on Success Program— Participant Profiles

### Renee Calloway

is a recent participant of the Five Year Lease Assistance Program and an example of how her perseverance and tenacity helped her achieve her goals.



During her initial case management meeting with staff she set 5 goals for herself: 1) find a suitable home; 2) obtain a certificate in the culinary arts; 3) secure full-time employment in security or any other field; 4) enroll in the Individual Development Account program offered by Community Action Partnership; and 5) become self-employed once she completes the program. Within three weeks of this meeting, Renee had: completed the student assessment at San Bernardino Valley College for her educational goals; located a home; and secured a full time security job! Renee moved quickly on her goals and plans to maximize her 5-years of housing assistance to continue solidifying other goals so at the end of the program terms she's economically independent.



As an army veteran, **Jose Quinteros** has made great strides in reaching his personal and professional goals through the Family Self-Sufficiency (FSS) Program. Thanks to his stable housing, he secured a job several years ago as a Certified

Medical Supply Technician at the Veterans Affairs Hospital in Loma Linda. Currently he is working with the Housing Authority staff to become a homeowner, his life time dream. Mr. Quinteros stated: "It was a journey accomplishing my goals! My advice to others is set realistic goals and stay true to your word. I'm thankful for what I have received and accomplished... this is not a hand out – it's a hand up!"

**Candi Candelarria**, a participant of the Family Self-Sufficiency (FSS) Program, is finally in the process of becoming a homeowner. A long time Housing Choice Voucher (HCV) participant, she received tremendous assistance from the County of San Bernardino, which directed her to the Housing Authority's HCV program. Through her participation in the FSS program, she received a check for over \$2,000 which allowed her to pay off her credit card debt and provided her a sense of relief. "Keep pushing forward, and go for your dreams and goals," says Ms. Candelarria. With construction in her new home underway, Ms. Candelarria will be able to move in early next year.



**Tony Cracraft**, a Housing Choice Voucher (HCV) participant for approximately 10 years, purchased his first home in December 2012. When Mr. Cracraft first applied to the homeownership program he had credit issues that needed to be resolved; however, he was

determined and dedicated to clearing his credit so that he could purchase a home. With the assistance of the Community Action Partnership Individual Development Account (IDA) Program, Mr. Cracraft completed the required workshops and utilized IDA's matching savings program to assist with the down payment on his home. Mr. Cracraft states: "All things are possible to all who believe. It seemed impossible, and I was able to pull it off. If we can do it, anyone can do it."

**Elena Acevedo** is a graduate from the Family Self-Sufficiency (FSS) Program who received a check for over \$29,100 in September 2013. "Without HACSB's assistance, I would not have been able to reach my goals of becoming a self-sufficient parent," says Elena. Rental assistance also enabled me to reach my educational goals to pursue a higher education." Ms. Acevedo is proudly self-sufficient and no longer in need of assistance. "I have gained independence." she proudly says.



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**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.

# HACSBFACTSHEET

## Maplewood Homes Pilot “Work” Requirement

The Housing Authority of the County of San Bernardino (HACSB) is one of the nation’s most progressive housing authorities in the Country. As the largest provider of affordable housing in the County, we proudly serve and house in excess of 30,000 people, most of whom are seniors, disabled individuals, and children. We also work on providing our families with the resources, skills, and motivation to transition out of assisted programs into economic independence. Therefore, as a reflection of our mission, we have increased our resident services and coupled them with new initiatives such as the pilot “work” requirement. In January 2013, HACSB implemented the pilot “work” requirement for residents of the Maplewood Homes Housing Community.

All current and future adult household members, between the ages of 18 and 61, will need to participate for a minimum of 15 hours a week in “work” activities. The definition of “work” encompasses participation in any one of the three phases:

### Phase 1 : Activities removing barriers to gainful employment

- These activities may include, but are not limited to: volunteer work, skills training, general education development (GED) courses, drug treatment, and/or mental health services.
- Under this category, residents have a maximum of 2 years upon which they should transition into the other two phases.



### Phase 2: Activities leading to gainful employment

- These activities may include, but are not limited to: vocational training, apprenticeships, college enrollment, and/or participation in certification programs.
- Under this category, residents will be allowed to participate for a maximum of two years upon which they should transition to Phase 3.



### Phase 3: Employment

- Employment is defined as a legal occupation for which the resident receives payment equal to at least 15 hours per week at California’s minimum wage. Under this category, residents should maintain at least 15 hours of work activities throughout the term of their assistance with HACSB.

### RESOURCES AVAILABLE

The on-site Family Resource Center Coordinator assists families in leveraging various community resources and provides case management services to help families find ways to meet the “work” requirement. We partnered with various community organizations, local government agencies, businesses, and schools to provide the residents with various resources to assist them with this requirement. The on-site computer lab has computers with increased broadband speeds and an on-site technician who teaches classes on Microsoft Office. The technician also facilitates the

Neighborhood Job Network which is designed to provide job seekers with the skills and abilities needed to secure employment. Through the Neighborhood Job Network, residents have weekly access to new job leads, assistance with resume development, assistance with online job applications, and information on effective job search techniques.

Additionally, an on-site Workforce Development Department Specialist (WDS) provides families with additional services such as job placement, interview skills, resume writing and other topics related to employment, further assisting families to achieve self-sufficiency.

Residents are encouraged to reach out to Brandi Wilson, Family Resource Center Coordinator at (909) 890-5363 or via email at [bwilson@keysnonprofit.org](mailto:bwilson@keysnonprofit.org) for more information on the resources available.

## EXEMPTIONS AND HARDSHIP POLICY

All elderly and disabled individuals will be exempt from this “work” requirement. Disability status shall be confirmed upon HACSB receiving proof of disability income/SSI or Certification of Disability form by a knowledgeable professional. A hardship policy has also been established and will be reviewed on a case by case basis.



## COMPLIANCE

HACSB reserves the right to verify, at any time, if household members are meeting the requirements for this endeavor. However, verification will take place at least annually.

If an adult member is determined to be non-compliant with the “work” requirement, they will be given an opportunity to become compliant within 90 days. If they fail to meet compliance after 90 days, a 90 day notice will be issued that states the rent will increase to the flat/market rent for that unit.

For more information on this and any other agency efforts, please visit our website at [www.hacsb.com](http://www.hacsb.com).



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02.21.2014

# HACCSB FACTSHEET

## Five-Year Lease Assistance Program | OVERVIEW

The Housing Authority of the County of San Bernardino (HACSB) provides housing assistance to approximately 30,000 individuals from all income ranges, most of whom are seniors, children, and individuals with disabilities.

Our housing programs and assistance provides families a stepping stone through difficult economic times. Our mission is to provide more than just housing - we strive to empower all individuals and families in need to achieve an enriched quality of life through housing opportunities, assistance, and resources throughout San Bernardino County. In conjunction with an extensive list of community partners, government agencies, employment service providers, and institutions of higher education we provide family/individual case management and counseling; assist with career training and job placement; and ensure program integrity.

As an innovative and proactive agency, HACSB is one of only 39 Housing Authorities of 3,200 nationally, designated as a Moving to Work demonstration site by Congress. Under this special designation, we implement new business practices and program services with three goals: 1) develop economic independent clients; 2) ensure freedom of housing choice; and 3) save tax payer dollars through operational efficiencies.

This designation better enhances our ability to fulfill our mission and better serve our program participants and residents. In an attempt to move forward with our mission and service philosophy, in January 2012 HACSB implemented a Five-Year Lease Assistance Program to help families achieve economic independence. Individuals/families pulled from the Housing Choice Voucher Program waiting list receive a five-year term limit on housing assistance through the Five Year Lease Assistance Program. All elderly<sup>1</sup> and disabled<sup>2</sup> applicants will be provided assistance under the Moving to Work-Housing Choice Voucher Program. As of Fiscal Year end 2013, there are currently over 700 families participating in this program.

### GOAL OF FIVE YEAR LEASE ASSISTANCE PROGRAM

The primary purpose of the Five Year Lease Assistance Program is to help families achieve economic independence. Short-term lease assistance provides an opportunity for families/individuals to secure better employment and achieve other personal and professional goals. In implementing a term limit, HACSB also anticipates serving more families by being able to pull applicants from the waiting list as participants reach the end of their participation in the program.

### ASSISTING FAMILIES TO ACHIEVE SELF-SUFFICIENCY

Staff will help connect and refer each family to supportive services and various economic mobility resources throughout the County. Specifically staff will work with adult household members to: 1) assess individual strengths and barriers; 2) create a personalized education and/or professional action plan; and 3) leverage and access existing resources including HACSB's Career and Technology Centers and job placement services at our various affordable housing sites. Specific personal, educational and professional target areas include:

- Workforce Readiness/Attainment and Workshops: Interviewing, professional etiquette, job search and retention skills, job advancement training, resume development, and job recruitment fairs;
- Education Attainment: GED/high school diploma completion, certification/vocational training, higher college education; and
- Life Skills Workshops: time management, self-esteem, motivation, and financial counseling (debt reduction, savings, banking services, etc.).

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<sup>1</sup> Elderly: Head of household and/or spouse must be 57 years of age or older

<sup>2</sup> Disabled Individual: Head of household and/or spouse must be receiving permanent disability income

## **DETERMINING THE LEASE ASSISTANCE AMOUNT**

HACSB contracted with an independent third party to initially establish the varying rental submarkets that exist within San Bernardino County. The payment standards that were developed out of this process reflect market rents by bedroom size within each of the nine submarkets. Families in this program receive a flat rental subsidy which is equal to 50% of the payment standard for the given submarket or the total contract rent whichever is lower. One of the benefits of this fixed subsidy amount is that as a household income increases, the participant's rent portion will not be increased. Families can utilize the difference for savings or to invest in self-sufficiency activities that will better prepare them for when they reach the end of their five-year assistance.

## **FUTURE FIVE YEAR LEASE ASSISTANCE PROGRAM PARTICIPANTS**

Once a family/individual is pulled from appropriate waiting list, they will be required to attend an eligibility briefing where they will receive information on the process to submit all paperwork, establish their personal action plans, and locate a housing unit.

## **PORTABILITY**

Participants moving (porting) out of San Bernardino County will also be subject to the Five Year Lease Assistance Program's term limit, but not to the flat subsidy. Participants moving (porting) in will not be subject to the Five Year Lease Assistance provisions or the flat

subsidy. However, the work requirement will still apply to all adult household members, except elderly<sup>3</sup> and disabled<sup>4</sup> participants.

## **LANDLORDS AND THE FIVE YEAR LEASE ASSISTANCE PROGRAM**

The process to lease a unit to a program participant receiving assistance under the Five Year Lease Assistance Program is similar to working with a traditional Housing Choice Voucher Program participant. Below are a few process steps:

- A request for tenancy approval needs to be submitted to HACSB
- The unit will be inspected before occupancy is approved to ensure it meets housing quality standards and follows payment standard guidelines
- Once approved, the landlord will execute a lease with their future tenant
- A Lease Assistance Payment contract will be executed with HACSB; specific details on the Five Year Lease Assistance Program are discussed at the various landlord briefings and orientation sessions.

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For additional detailed information on the Housing Authority's Five-Year Lease Assistance Program, please refer to the Administrative Plan located on our website at [www.hacsb.com](http://www.hacsb.com).

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# APPENDIX H: SUMMARY OF MTW ACTIVITIES

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR	STATUS
Activity 1	Single Fund Budget	Administrative Efficiency	FY 2009	Ongoing
Activity 2	Strategic Investment Policies	Administrative Efficiency	FY 2009	Ongoing
Activity 3	Alternate Assessment Program	Administrative Efficiency	FY 2009	On Hold
Activity 4	Biennial Recertifications	Administrative Efficiency	FY 2009	Ongoing
Activity 5	Local Verification Policies	Administrative Efficiency	FY 2009	Ongoing
Activity 6	Elimination of Assets	Administrative Efficiency	FY 2009	Ongoing
Activity 7	Controlled Program Moves	Administrative Efficiency	FY 2009	Ongoing
Activity 8	Local Policies for Portability	Economic Independence	FY 2009	Ongoing
Activity 9	Elimination of Earned Income Disallowance	Economic Independence	FY 2009	Ongoing
Activity 10	Minimum Rent	Economic Independence	FY 2009	Ongoing
Activity 11	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009	Ongoing
Activity 12	Local Payment Standards	Expanding Housing Opportunities	FY 2009	Ongoing
Activity 13	Local Inspection Standards	Administrative Efficiency	FY 2010	Ongoing
Activity 14	Local Asset Management Program	Administrative Efficiency	FY 2010	Ongoing
Activity 15	Pilot Work Requirement	Economic Independence	FY 2010	Ongoing
Activity 16	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010	Complete
Activity 17	Local Income Inclusion	Economic Independence	FY 2011	Ongoing
Activity 18	Property Management Innovation	Administrative Efficiency	FY 2011	Ongoing
Activity 19	Local FSS program	Economic Independence	FY 2011	Ongoing
Activity 20	Five Year Lease Assistance Program	Economic Independence	FY 2011	Ongoing
Activity 21	Utility Allowance Reform	Administrative Efficiency	FY 2012	Closed Out
Activity 22	Streamlined Lease Assistance Program	Administrative Efficiency	FY 2013	Implementation 11/1/2014
Activity 23	No Child Left Unsheltered	Economic Independence	FY 2014	Pending Implementation
Activity 24	Transition for Over-Income Families	Economic Independence	FY 2014	Pending Implementation
Activity 25	Flexible Subsidy Initiative	Expanding Housing Opportunities	FY 2015	Pending HUD Approval