

2010

## Housing Authority of the County of San Bernardino



*Building Communities  
Changing Lives*

# MTW FY 2010 ANNUAL REPORT

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## TABLE OF CONTENTS

SECTION	TITLE	PAGE
I	INTRODUCTION	1
II	GENERAL OPERATING INFORMATION	5
III	NON – MTW INFORMATION	14
IV	LONG TERM MTW PLAN	17
V	PROPOSED MTW ACTIVITIES	20
VI	ONGOING MTW ACTIVITIES	28
VII	SOURCES AND USES OF FUNDS	47
VIII	ADMINISTRATIVE	51
APPENDICES		
A	SUMMARY CHART OF ACTIVITIES	52
B	PERFORMANCE AND EVALUATION REPORTS	53
C	MTW FACT SHEETS	69

## I. INTRODUCTION

**Background** – The Housing Authority of the County of San Bernardino (HACSB) received the U.S. Department of Housing and Urban Development’s (HUD) Moving to Work (MTW) designation in 2008 and has completed its second year of participation (Fiscal Year 2010- October 1, 2009 to September 30, 2010) in the program. This designation allows us 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. We are committed to achieving significant results throughout the term of our Agreement in order to meet the three statutory objectives, our long term vision and the affordable housing needs of the residents of the County of San Bernardino.

An initial MTW plan and a comprehensive revised Initial Plan were submitted and approved by HUD for the period covering FY 2009. Our FY 2010 MTW Annual Plan was approved by HUD on September 30, 2009. Shortly thereafter we submitted and HUD approved an Amendment to the FY 2010 MTW Annual Plan to incorporate the proposed HOPE VI Revitalization Plan for the Lugonia Avenue public housing site in Redlands, California. Our FY 2009 Annual Report, submitted in December 2009, highlighted the development process of the implementation of our approved activities. In February 2010, we submitted a Second Amendment to the FY 2010 plan which initiated Activity 16: Operating Subsidy for Vista del Sol. Our final Amendment to the FY 2010 Plan was submitted in July 2010 to modify and clarify two approved activities: Local Project Based Voucher Program and Local Asset Management Program. Our FY 2011 MTW Plan, submitted in July 2010 proposed four new exciting activities and we look forward to their implementation.

The County of San Bernardino is the largest county in the contiguous United States by area and ranks in the top 15 most populous counties in our nation. San Bernardino County has been hit extremely hard by the current economic crisis, ranking in the top 10 in foreclosures. Our County’s current unemployment rate is 13.8%, which is higher than the state of California’s rate at 12.2% and significantly higher than the nations at 9.6%<sup>1</sup>. The State of California mirrored the nations nearly 1% increase in the number and percentage of people in poverty<sup>2</sup> which is at 14.3%. We do realize the significance of housing assistance to families in need and are working hard to use our MTW flexibility to serve more families.

**Overview of Agency’s Ongoing Goals and Objectives** – Prior to our designation as a MTW agency, HACSB developed a comprehensive 30 year strategic plan. Through the MTW program and our strategic plan, HACSB aims to accomplish the following through our established goals and objectives:

- **Goal 1 - *Operational efficiency through innovation*** – *Maximizing HACSB’s economic viability and sustainability through the following objectives:*
  - Ensure excellent and efficient stewardship of resources and programs

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<sup>1</sup> Data Source: U.S. Bureau of Labor Statistics

<sup>2</sup> Data Source: U.S. Census Bureau, American Community Survey

- Maintain a workplace environment that attracts and retains capable employees who feel they are making a difference
- Develop a communication program that effectively disseminates information inside and outside the Agency
- Provide world class customer service
- **Goal 2 - Self-Sufficiency** – *Facilitating opportunities for families and individuals to become self-sufficient and financially independent to transition from dependency on housing subsidy through the following objectives:*
  - Ensure that each client has, is committed to, and is implementing a feasible and inspiring (to them) plan for economic independence or life improvement.
    - Transform client mindset from entitlement to empowerment
    - Partner with external organizations to support clients in acquiring life skills, education and training
    - Assist clients in transitioning to Home Ownership/Market housing



HACSB co-sponsored a Youth Job Fair in June 2010

- **Goal 3 - Expand housing opportunities through repositioned assets** – *Providing quality affordable housing opportunities in mixed-income communities with access to excellent quality of life through the following objectives:*
  - Have an increasingly diverse number of funding sources to provide the programs and services described in the strategic plan
  - Improve HACSB's existing housing stock
  - Increase building stock to meet the low income requirements of San Bernardino County

More detailed information on the agency's long term MTW vision, including our goals and values is provided in Section IV: Long Term MTW Plan. Our MTW activities are designed to meet HUD's objectives and help us achieve our goals.

**FY 2009 Activities** – In our FY 2009 Plan, we proposed 12 activities – seven to increase operational efficiency, three to promote self sufficiency among our residents and two to provide more housing opportunities to our families. Through the development phase of each of our MTW activities we reviewed and adopted changes to our current policies and procedures, established baselines, trained staff and examined its impact on our families, landlords, staff and the agency. We postponed the planning and implementation of Activity 3: Alternate Assessment Program and are working with other MTW agencies to develop a uniform assessment system that will be applicable to all MTW agencies and replace the current Section Eight Management Assessment Program (SEMAP) and Public Housing Assessment Program (PHAS) systems.

**FY 2010 Activities** – Through our FY 2010 Plan and amendments, we adopted four new activities – two aimed at increasing operational efficiencies, one to increase family self-sufficiency and one with the goal of expanding housing opportunities. Activity 16: Operating Subsidy for Vista del Sol was implemented and the activity has been completed. The other three activities are in the development phase and will be implemented in FY 2011.

**FY 2011 Activities** – For FY 2011, we proposed four new activities – one met the objective of operational efficiency and three to promote self sufficiency among our families. The activities were approved on Oct 18, 2010 and we have started the development process for these activities.

**Activity List** – The list of approved activities through FY 2010 are included below –

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR
Activity 1	Single Fund Budget	Operational Efficiency	FY 2009
Activity 2	Strategic Investment Policies	Operational Efficiency	FY 2009
Activity 3	Alternate Assessment Program	Operational Efficiency	FY 2009
Activity 4	Biennial Recertifications	Operational Efficiency	FY 2009
Activity 5	Local Verification Policies	Operational Efficiency	FY 2009
Activity 6	Elimination of Assets	Operational Efficiency	FY 2009
Activity 7	Controlled Program Moves	Operational Efficiency	FY 2009
Activity 8	Local Policies for Portability	Self-Sufficiency	FY 2009
Activity 9	Elimination of Earned Income Disallowance	Self-Sufficiency	FY 2009
Activity 10	Minimum Rent	Self-Sufficiency	FY 2009
Activity 11	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009
Activity 12	Local Payment Standards	Expanding Housing Opportunities	FY 2009



<b>Activity 13</b>	Local Inspection Standards	Operational Efficiency	FY 2010
<b>Activity 14</b>	Local Asset Management Program	Operational Efficiency	FY 2010
<b>Activity 15</b>	Pilot Work Requirement	Self-Sufficiency	FY 2010
<b>Activity 16</b>	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010
<b>Activity 17</b>	Local Income Inclusion	Self-Sufficiency	FY 2011
<b>Activity 18</b>	Property Management Innovation	Operational Efficiency	FY 2011
<b>Activity 19</b>	Pilot Local FSS program	Self-Sufficiency	FY 2011
<b>Activity 20</b>	Term Limits	Self-Sufficiency	FY 2011



Participants from our Public Housing Community at Barstow participate in NAHRO's "What Home Means To Me" poster contest.

## II. GENERAL OPERATING INFORMATION

HACSB administers more than 10,000 units of housing assistance throughout the County of San Bernardino consisting of Public Housing, MTW Voucher Program, Shelter Plus Care Vouchers, Veterans Administration Supportive Housing (VASH) Vouchers and other local programs.

### A. HOUSING STOCK INFORMATION

#### PUBLIC HOUSING

HACSB began FY 2010 with 1,661 public housing units under Annual Contributions Contract (ACC). This does not include 9 offline units that have previously been permanently converted to non-dwelling units for resident service purposes such as head-start centers, child care, and education centers. In addition, 7 public housing units were sold under the Section 32 Homeownership program to low income families. The picture on the right shows the Huynh family, former public housing residents, who purchased our public housing unit in Colton. The seven units that were removed from the ACC are listed below –



PUBLIC HOUSING UNITS SOLD IN FY 2010		
Address	Project	AMP
1375 Candleberry Road, Rialto, CA	42	160
1127 Broadway Court, Barstow, CA	35	170
508 Lemonwood Avenue, Redlands, CA	42	150
1565 Villa Court, Highland, CA	42	150
133350 Deerwood Road, Apple Valley, CA	42	180
1988 Quartermaster Street, Colton, CA	42	160
13637 Arroyo Drive, Victorville, CA	32	180

No additions were made to the public housing inventory. Therefore, as of October 1, 2010 there were 1,654 public housing units available for occupancy.

On June 9, 2010, HUD approved our disposition application for 335 units and on October 1, 2010 we were awarded 335 tenant protection vouchers. We are in the process of project basing 308 units and the process should be completed by Dec 31, 2010. The remaining 27 units will be used for a special program with the Department of Behavioral Health. Following is a list of 335 units approved for disposition –



PUBLIC HOUSING APPROVED FOR DISPOSITION IN FY 2010			
PROJECT	AMP	CITY	UNITS
35	150	Loma Linda	12
24	150	Redlands	8
36	150	Redlands	6
32	150	Yucaipa	9
42	150	Yucaipa	4
17	160	Bloomington	8
32	160	Chino	24
35	160	Colton	8
17	160	Fontana	8
23	160	Fontana	9
31	160	Fontana	10
36	160	Fontana	5
17	160	Ontario	12
21	160	Ontario	2
26	160	Ontario	8
30	160	Ontario	10
32	160	Ontario	10
35	160	Ontario	11
36	160	Ontario	8
20	160	Montclair	8
32	160	Montclair	14
35	160	Montclair	4
32	160	Rancho Cucamonga	6
34	180	Adelanto	14
31	180	Apple Valley	6
34	180	Apple Valley	12
42	180	Apple Valley	11
34	180	Hesperia	6
35	180	Hesperia	14
22	180	Victorville	9
31	190	Joshua Tree	9
25	190	29 Palms	10
29	190	29 Palms	10
28	190	Yucca Valley	10
31	190	Yucca Valley	20
TOTAL			335

**Demolition Plans** - In FY 2010, we applied for a HOPE VI grant for the demolition of 115 units in Redlands, CA, commonly referred to as the Lugonia Avenue Public Housing site (Site 019-001,

008 & 009); however, we were not successful in obtaining the grant. As a result, we are looking into alternative financing to continue our project. The current proposal will demolish the units and will be redeveloped as a mixed use/mixed income community consisting of 230 units, which include a one for one replacement of the public housing units. The new development will also include a mixture of townhouses and affordable single family homes, among low income apartments.

Preliminary plans are also underway for the demolition and reconstruction of the Waterman Gardens development (site 019-002). Due to its age and insufficient funding, this development is severely lacking in terms of modern amenities, and residents have endured ongoing disruption for short-term repairs without the benefit of a long-term plan. It is anticipated that the existing 252 Public Housing units will be replaced one-for-one and a substantial number of additional affordable units will be added in the form of a mixed use/mixed income community.

### **Capital Fund Program –**

In FY 2010 HACSB substantially completed major exterior renovations at the Medical Center Housing site (19-03, AMP 130) funded primarily through the Capital Fund Financing Program, as well as exterior renovations at Colton (19-04), Chino (19-06) (both AMP 160), and Redlands (19-05, AMP 150) funded by the Formula American Recovery and Reinvestment Act (ARRA) allocation. The work at each of these sites includes:

- Lead-based paint abatement;
- Roof replacement;
- Exterior Siding replacement;
- Window replacement;
- Swamp Cooler replacement;
- Doors, windows and interior finishes;
- Electrical lighting; and
- Landscaping and site improvements.

Although HACSB did engage in other capital fund projects, this was the primary expenditure of funds throughout FY 2010.

**Capital Fund Program (2011)** –The Capital Fund Program Five Year Plan and Budget is included as Appendix C. The Agency will continue its capital improvements at the Medical Center Housing site (19-03, AMP 130), Colton (19-04), Chino (19-06) (both AMP 160), and Redlands (19-05, AMP 150), and expects to complete that work in early 2011. In addition, the Agency has commenced the master planning process for the comprehensive redevelopment of the Waterman Gardens site in San Bernardino (19-02, AMP 120), and expects to complete a master plan and receive entitlements by the end of 2011.

The most significant capital expenditures planned for FY 2011 using Capital Funds includes the phased interior remodels, including installation of kitchen cabinets, at the Medical Center Housing site (19-03, AMP 130). Also planned is the beginning of site improvements and landscaping at the Barstow site (19-07, AMP 170). Redevelopment activities at the Redlands

Lugonia site (19-01, AMP 150) will begin with the first phase of construction documents to be completed and associated relocation processes implemented. Competitive ARRA funding awarded to HACSB provides for the installation of solar photovoltaic panels as a pilot project at the Medical Center site, which began construction in November 2010. Details of smaller planned capital projects are described in Appendix C.

### **VOUCHER PROGRAM**

In FY 2010, HACSB renewed its commitment to serve at a minimum, our MTW baseline of 7,748 families. Our waiting list has been closed since 2007 and starting in May 2010, we began pulling from the waiting list. Our goal is to reach 7,748 families by April 2011. More information on our leasing efforts is included in the 'Leasing Information' section on pages 10-12.

**PROJECT BASED VOUCHER** - On September 15, 2010, we project based 53 of the 71 units at our Vista del Sol Community raising our Project Based Voucher count to 402. The detailed list of our project based vouchers is given below –

<b>Voucher Program – Project Based Voucher Properties</b>		
<b>Property Name</b>	<b>City</b>	<b>Number of Units</b>
Redwood Terrace	Fontana	68
Robert O. Townsend	Montclair	48
Vista Del Sol	Redlands	53
Arrowhead Woods	San Bernardino	51
Grandview Towers	Twin Peaks	40
Yucaipa Crest	Yucaipa	45
Yucaipa Terrace	Yucaipa	51
Desert Village	Victorville	46
<b>TOTAL PROJECT BASED UNITS</b>		<b>402</b>

As mentioned in the Public Housing Disposition section, our disposition application for 335 units was approved on June 9, 2010 and we received the replacement tenant protection vouchers on October 1, 2010.

**AUTHORITY OWNED (Non-HUD) HOUSING STOCK** – HACSB owns 1,195 units (including 4 commercial units) across 16 cities throughout the County. Many of these units are affordable for families earning 80% or less of the Area Median Income (AMI) as a result of public funds acquired for the acquisition and/or development, such as HOME and Redevelopment Housing Set-Aside funds. The chart below lists the properties and total number of units in each property in the HACSB Authority Owned (Non-HUD) Housing Portfolio. In June 2010, HACSB completed the purchase of 300 units at Virginia Village and Scenic View Apartments in Barstow. These properties were purchased with funds from HUD's Neighborhood Stabilization Program and HOME funds. HACSB also sold 241 units to its affiliate nonprofit HPI Property Acquisitions LLC.

A detailed list of these properties can be found in Section III – Non-MTW Related Information under the Affiliate Non Profit section.

<b>AUTHORITY OWNED HOUSING STOCK</b>		
<b>Property Name</b>	<b>City</b>	<b>Total Units</b>
Muni Property	Apple Valley	7
Desert View	Baker	24
Scenic View	Barstow	156
Virginia Village	Barstow	144
9 <sup>th</sup> Street Property	Colton	3
Canyon Villas	Colton	46
Las Palmas	Fontana	16
Redwood Terrace	Fontana	68
A Avenue	Hesperia	4
Sunnyside	Hesperia	30
Mesa Gardens	Hesperia	29
Sequoia	Hesperia	35
Stone Creek	Loma Linda	20
Van Leuven (14/8)	Loma Linda	22
Mentone (State)	Mentone	34
Crafton	Mentone	5
Kingsley Patio	Montclair	34
Bahia	Ontario	3
Frankish Building (includes 4 commercial)	Ontario	20
Brockton	Redlands	8
Hampton Court	Redlands	24
Lombard	Redlands	4
Stillman	Redlands	9
Merrill	Rialto	24
Arrowhead Woods	San Bernardino	51
Yucca	San Bernardino	14
Grandview Towers	Twin Peaks	40
Andalusia	Victorville	164
Sunset Gardens	Yucaipa	39
Third Street	Yucaipa	19
Yucaipa Crest	Yucaipa	45
Yucaipa Terrace	Yucaipa	51
Scattered Sites	Various	3
<b>TOTAL ALL AUTHORITY OWNED HOUSING STOCK</b>		<b>1,195</b>

## B. LEASING INFORMATION

**Summary** – In FY 2010, the current economic condition played a key role in affecting our leasing rate in both the Voucher and the Public Housing Program. The higher unemployment rate (13.8% in our County compared to 9.6% in the nation), resulted in lower rents in the Public Housing Portfolio. Average household income for families in both programs has decreased and as a result many families have struggled to pay their rent. In the Voucher Program, we have started pulling from the waiting list and have families in some phase of briefing, voucher issuance or leasing.

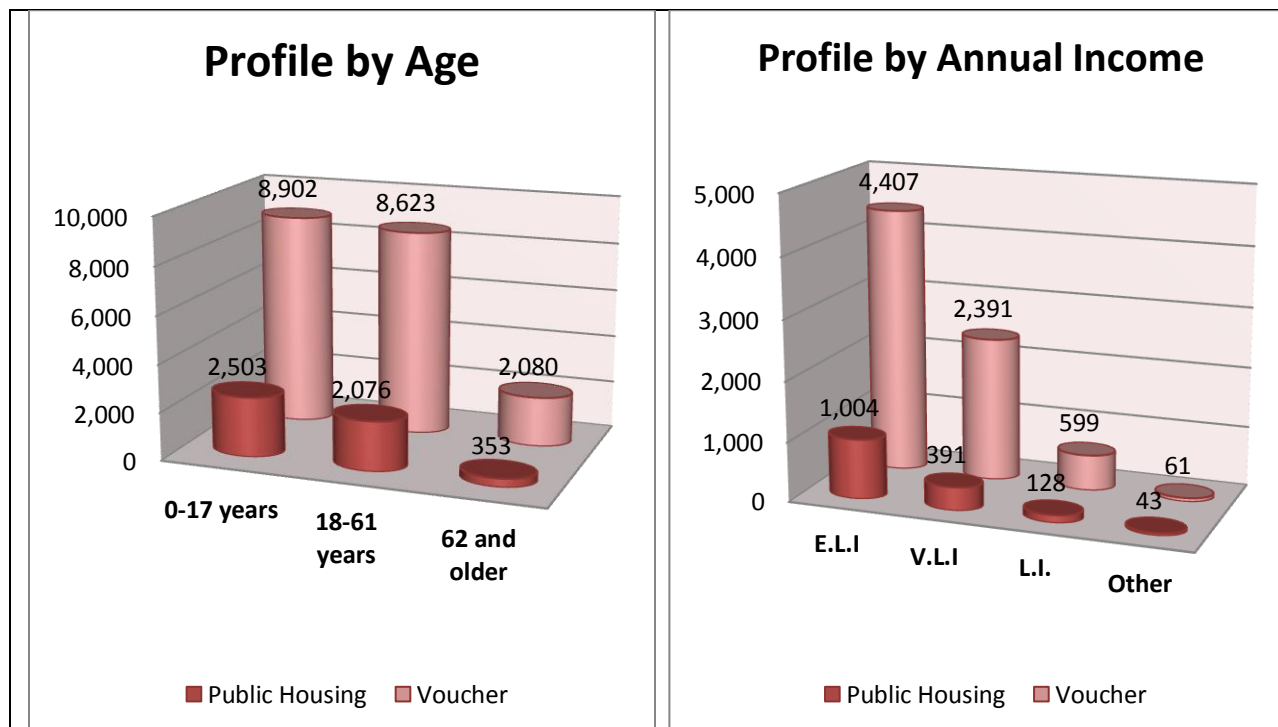
HACSB LEASING INFORMATION							
PUBLIC HOUSING		HOUSING CHOICE VOUCHERS				NON-HUD HOUSING UNITS	
			Total	Non PBV	PBV		
Total Units (available for leasing)	1,580	MTW Vouchers	7,748	7,346	402	Total Units	1,195
Total Units Leased	1,560	Vouchers Leased	7,145	6,785	360	Total units leased	1,006
Percent of Units Leased	98.7%	Percent of MTW Voucher Utilization	92.2%	92.4%	89.6%	Percent of units leased	84.2%
		Total non MTW Vouchers	478				
		Total non MTW Vouchers leased	353				
		Percent of non MTW Voucher Utilization	73.8%				

At the end of FY 2010, we were assisting 7,145 families (a 92.22% lease rate) in the Voucher Program and 1,560 families (a 98.73% lease rate) in the Public Housing Program. The number of project based vouchers in use at the end of the Plan year was 360 for an 89.6% utilization rate. Through FY 2010, we assisted an additional 656 families in the Voucher Program and 276 families in the Public Housing Program that left during the fiscal year. In our Project Based Voucher portfolio, 53 units were added in FY 2010. These units were added on September 15, 2010 at our Vista del Sol, Redlands Community. In our Non-HUD portfolio, we are currently in the process of completing renovations at two of our larger sites – Virginia Village and Scenic View. This is part of the reason for the 84.2% lease rate in the portfolio. The lease rate for our Non-MTW vouchers is low (73.9%), but as noted in the MTW FY 2011 Plan, we face challenges in some programs due to the delay by our partners. Some of our partners are facing funding difficulties due to the current economic conditions. As an example, we have partnered with the Department Behavioral Health (DBH) in the Stepping Stones Program (Shelter + Care) for homeless individuals with disabilities such as severe mental illness and chronic substance

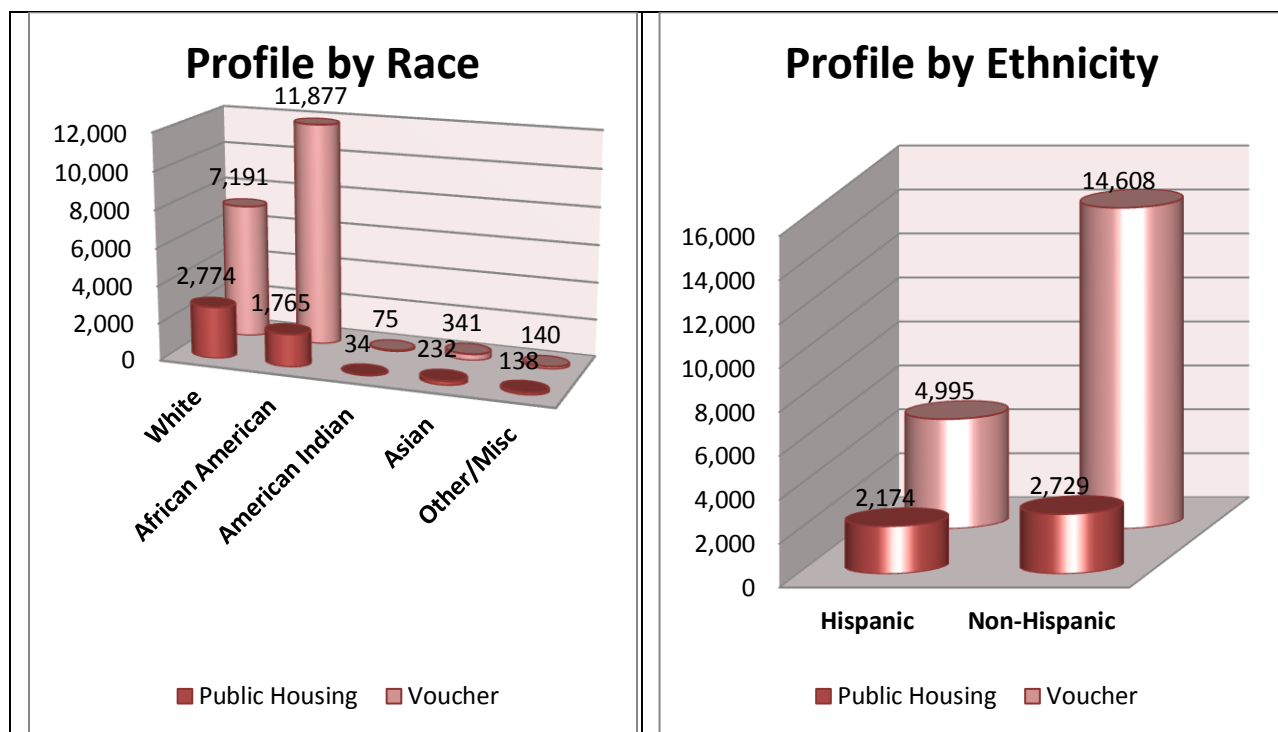
abuse. Under the program requirements, HACSB provides the housing services based on referrals from DBH, which matches the housing funds by providing social services and referrals have decreased. Our Mainstream program has a 92% utilization rate and our VASH program has a 73% utilization rate. We have been working closely with the Veterans Administration, to increase our lease ups in the VASH program. We were informed that they were in the process of hiring new case managers and social workers and once the new workers are trained, they will begin sending referrals to our agency. We have taken a proactive approach and increased our efforts to work with our partners and hope to see the results in FY 2011.

**Tenant Profile** - The following charts provide a snapshot of our families at the end of FY 2010. The number of families in our Voucher Programs, at the end of FY 2010 was 7,498 and 1560 families in the Public Housing Program. The chart below lists some of the specifics on the population served.

VOUCHER PROGRAM	PUBLIC HOUSING
<ul style="list-style-type: none"> <li>Nearly 56% of persons assisted are children and seniors.</li> <li>21% are disabled.</li> <li>59% are Extremely Low Income, 32% are Very Low Income and 8% are Low Income.</li> </ul>	<ul style="list-style-type: none"> <li>Nearly 57% of persons assisted are children and seniors</li> <li>12% are disabled</li> <li>64% are Extremely Low Income; 25% are Very Low Income; 8% are Low Income and 3% are other.</li> </ul>







## C. WAITING LIST INFORMATION

**Summary** – The chart below provides a summary of the waiting list applicants by income and household type for both the Public Housing Program and the Voucher Program at the end of FY 2010:

Waiting List Demographics								
Family Type	Public Housing Waiting List				Housing Choice Voucher Waiting List			
	ELI (30% AMI)	VLI (50% AMI)	LI (80% AMI)	Total PH	ELI (30% AMI)	VLI (50% AMI)	LI (80% AMI)	Total HCV
Elderly	1,327*	211	23	1,561	1,616	41	10	1,667
Disabled	544	102	9	655	146	94	13	253
All Other	19,995	2,530	629	23,154	21,506	427	131	22,064
<b>TOTAL</b>	<b>21,866</b>	<b>2,843</b>	<b>661</b>	<b>25,370</b>	<b>23,268</b>	<b>562</b>	<b>154</b>	<b>24,121**</b>
Public Housing and Housing Choice Voucher Waiting List Income Summary								
Total Extremely Low Income Applicants								45,137
Total Very Low Income Applicants								3,404
Total Low Income Applicants								812
<b>Total Applicants</b>								<b>49,353</b>

\* To avoid double counting, a person who is both elderly and disabled is identified as elderly.

\*\* Total also includes all other families like over income or larger family sizes (137).

The waiting list for the Voucher Program has been closed since April 2007; however in May 2010 we started pulling from our waiting list. The waiting list pull has been at the rate of about a 100 a week and a total of 3,391 applicants have been pulled through September 30, 2010. In September 2010, we undertook a massive waiting list pull and 1,200 applicants were scheduled for income eligibility. So far, 356 vouchers have been issued and 77 applicants have completed the leasing process. We anticipate to be fully leased by April 2011.

In FY 2010, our Public Housing waiting list increased by nearly 6,000 families. This could be attributed to many factors like the weak economy, a 13.8% unemployment rate which is higher than the state/nation, and high foreclosure rates. In addition, the waiting list for the Voucher program has been closed due to its large volume and families in need could only apply to the Public Housing Waiting list.

The Public Housing waiting list is site based and remained open for all AMPS throughout the year, except for AMP 180 which covered Victorville, Hesperia and Apple Valley. This site has 82 scattered sites that were part of the disposition application that was approved on June 9, 2010. The waiting list for AMP 190 which covered Yucca Valley and Twenty-nine Palms, was closed in September 2010 and was also part of the disposition application.

In addition to these two lists, we also maintain a Project Based Voucher waiting list which is site specific. Families are allowed to apply to multiple sites to give them more housing choices. The details of the waiting list for PBV by site are given below –

<b>Project Based Voucher Waiting List</b>					
<b>Property Name</b>	<b>Units</b>	<b>ELI (30% AMI)</b>	<b>VLI (50% AMI)</b>	<b>LI (80%AMI)</b>	<b>Total</b>
Redwood Terrace -Fontana	68	265	11	1	277
Robert O. Townsend - Montclair	48	261	20	4	285
Vista Del Sol - Redlands	53	54	2	0	56
Arrowhead Woods - San Bernardino	51	80	5	0	85
Grandview Towers - Twin Peaks	40	37	0	0	37
Yucaipa Crest - Yucaipa	45	70	4	0	74
Yucaipa Terrace - Yucaipa	51	68	6	0	74
Desert Village - Victorville	46	105	4	0	109
<b>TOTAL</b>	<b>402</b>	<b>940</b>	<b>52</b>	<b>5</b>	<b>997</b>

### III. NON-MTW RELATED INFORMATION

#### **Broadband Technologies Opportunities Program (BTOP)**

In February 2010, HACSB was awarded a competitive, three year \$1.2 million BTOP grant to provide technology access to underserved communities, boost economic growth and create



jobs. The funds are being used at our 5 computer centers, located throughout the County, to add 25 new workstations, increase broadband speeds, extend operating hours, provide a range of online training workshops, and serve additional users. The picture on the left shows the Computer Center located in our Barstow Housing

Community. In addition, HACSB has partnered with the Career Institute to provide valuable career, education and job counseling services at our centers for our residents and members of the community. The Career Institute provides personalized one on one session to help our families set the path to achieve self sufficiency.

**Special Programs** – In addition to the MTW Voucher Program, HACSB administers other voucher programs and special programs, such as the Mainstream, HOPWA, VASH, Stepping Stones, New Horizons, Good Samaritan Program, Master Leasing and Tenant Based Assistance Program.

- **Mainstream** – This program is designed to provide rental assistance to persons with disabilities to enable them to lease affordable private housing of their choice. HACSB coordinates with various groups to provide referrals for services that will allow participants to live an independent lifestyle. At the end of FY 2010, 92 people were assisted under this program.
- **Housing Opportunities for People with AIDS (HOPWA)** - HACSB has partnered with Foothill Aids Project to offer rental assistance and supportive services to persons 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 end of FY 2010, 42 people were assisted under 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 end of FY 2010, 35 people were assisted under this program.

- **Stepping Stones** - 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 social services. At the end of FY 2010, 20 people were assisted under this program.
- **New Horizons** – This program is offered through the Department of Behavioral Health for homeless individuals that are currently receiving services from the department. It was started in 2008 and will run through 2013. At the end of FY 2010, 34 people were assisted under this program.
- **Good Samaritan** – This program started in 2008 and is offered through the Department of Behavioral Health for homeless individuals. At the end of FY 2010, 7 people were assisted under 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 end of FY 2010, 11 people were assisted under this program.
- **Tenant Based Assistance (TBA)** – This program is funded by HOME funds provided by the County of San Bernardino and serves 125 families. HACSB administers the TBA program identically to the HACSB MTW Voucher Program. At the end of FY 2010, 112 people were assisted under this program.

**Other Affordable Rental Housing** – HACSB owns 1,191 Non-HUD affordable residential units and 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.

**Affiliate Non-Profit** – Housing Partners I, Inc. (HPI, Inc.) is an affiliate non-profit of HACSB. In April, 2010, HPI I, Inc. completed construction of a new 71 unit senior development (Vista Del Sol) in North Redlands. As part of the comprehensive strategy for the redevelopment of the Redlands, Lugonia Public Housing site, senior public housing tenants from the Lugonia site were able to relocate to the new development. With nearly 20 years of housing development experience behind it, HPI I, Inc. provides HACSB the means with which to leverage a variety of public as well as private funding sources to continue to increase the supply of affordable housing throughout the county of San Bernardino. HPI Property Acquisitions LLC is an HPI I, Inc.

controlled entity that owns 241 units throughout the County of San Bernardino. The list of units owned by HPI I, Inc and HPI Property Acquisitions LLC are shown below.

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

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



Vista Del Sol is a 71-unit senior community developed by HPI Inc

#### IV. LONG TERM PLAN

**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.”*

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

**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.

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

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

*The mission of the HACSB has two faces: buildings and people. The traditional image of the agency focuses on the first. Buildings are tangible; you can touch them, count them, measure them, value them, walk into them. But the truly important aspect of our mission is the people who live in those buildings because for many, their needs extend far beyond just having a place to live in. That’s why, we at the housing authority renewed our commitment to serving the needs of our residents.....our customers.*

*Susan L. Benner –  
Executive Director*

HACSB developed a comprehensive 30 year strategic plan in 2008 which included eleven strategic goals. These goals serve as a guiding map to help us achieve our mission and vision. The goals range from helping our participants achieve self sufficiency, providing quality service to strengthening our staff and our agency. The strategic goals contained in our agency’s 30 year strategic plan are listed below:



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

**Goal 1 - Operational Efficiency through Innovation** – MTW gives HACSB the flexibility to implement innovative solutions that streamline processes and increase efficiency. Activities implemented under the goal of operational efficiency and innovation will improve staff morale, reduce program fraud, increase accuracy, and make the program more understandable to the community and clients. In July 2010, we established a new Program Integrity Department that oversees internal quality control, inspections, audits, errors and fraud. The following strategic goals under the agency's 30 year strategic plan will direct the MTW activities under this goal:

- ◆ No eligible family waits longer than 10 days for housing
- ◆ HACSB has secured the resources needed for accomplishing its Mission
- ◆ HACSB is adequately staffed with well trained and fully developed employees

The specific MTW Activities that address these strategies are

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

**Goal 2 - Promote Self-Sufficiency** – As mentioned on page 17, in the quote from Susan Benner, our Executive Director, serving the needs of our residents is our priority. Our strategic goals focus on helping our residents on their path to self sufficiency. The following strategic goals under the agency's 30 year strategic plan will direct the MTW activities under this goal:

- ◆ Clients have achieved their own personal level of stability and economic independence
- ◆ For those whom a transition is appropriate, the maximum stay in assisted living is 5 years
- ◆ HACSB leaders and supporters are innovative policy makers and influencers of legislation
- ◆ HACSB clients, programs and properties are embraced by all communities.

Our MTW designation supports these goals and allows us to develop distinctive activities that help us achieve them. Some of our MTW activities geared at self sufficiency are –

Local Policies for Portability	Term Limits
Minimum Rent	Pilot Work requirement
Local Income Inclusion	Pilot Local FSS Program
Elimination of Earned Income Disallowance	

**Goal 3 - Expand Housing Opportunities through Repositioned Assets** – We believe that creating quality housing choices for our residents is a top priority. Through its Initial Plan the Agency has already begun repositioning assets in order to better serve the community. The following strategic goals in our strategic plan guide MTW activities aimed at providing more housing choices to low income families:

- ◆ HACSB is a leading developer and provider of affordable housing in the County of San Bernardino
- ◆ HACSB clients live in safe and desirable homes and communities where they can develop and prosper

The specific MTW activities that that address these strategies are:

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

HACSB realizes the significance of its MTW designation and is dedicated to use it to increase efficiency in the use of federal funds, incentivize self sufficiency for our residents, and provide better quality housing choices for our families. Maria Razo, Deputy Executive Director, Office of Business Administration reflects on our MTW designation to the quote from the movie *Spiderman*, – “With great power comes great responsibility.” HACSB strives at exceeding HUD’s expectations and takes all the necessary steps to find solutions to many problems that have plagued various housing authorities. Prior to proposing new activities, we do significant research to understand its impact on our residents, the agency and the program in a broader sense. We also actively participated and presented in the 2010 MTW conference and received great insight from HUD staff and our fellow MTW agencies. Building on these strong partnerships, we are confident to achieve our 30 year strategic plan.

## V. PROPOSED ACTIVITIES

### POSTPONED MTW ACTIVITIES

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

In FY 2009, HACSB proposed to develop Activity 3: Alternate Assessment Programs which would meet the statutory goal of increasing operational efficiencies. 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. This topic was discussed again at the 2010 Annual MTW Conference and HACSB is working with other agencies to develop a replacement assessment. On December 8, 2010, HACSB formally opted out of the PHAS and SEMAP and will continue to retain its high performer status until HUD adopts a new PHAS regulation and HACSB can be fully scored under that regulation.

### MTW ACTIVITIES (not yet implemented)

The following activities have been approved and the planning for successful implementation is ongoing. They are set to be implemented shortly.

#### **Activity 2: Strategic Investment Policies**

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

This activity was approved in our FY 2009 MTW Plan and it gave us the authority to implement a Strategic Investment Policy which would be consistent with California Government Code Section 53630 and/or HUD approved investment criteria.

##### **B. Activity Impact**

This activity was not fully implemented in FY 2010 so its impact cannot yet be measured. In FY 2010, steps were taken to develop the investment policy for MTW funds which is consistent with California Government Code Section 53630. These investments will be evaluated at the end of every month to ensure that our earnings are over the State's LAIF rate of returns.

Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Expected Outcome
Average interest earned on MTW funds invested during FY 2009	1.72% interest earned on MTW funds invested during FY 2009	Interest earned on MTW funds invested	Percentage increase in investment earnings over State LAIF interest rates	Increased overall investment returns

### **C. Benchmark Achievement**

As this activity has not been fully implemented we cannot report on our benchmark achievement through FY 2010. The investment policy has been developed and was approved by our Board on November 10, 2010. We now plan to consult with an investment strategist in order to establish a time laddered investment pool. In our FY 2011 Annual Report we expect to be able to show a .01% increase in our investment income over the State's LAIF interest rates (0.51% as of Sep 2010).

### **D. Measurement Revisions**

There are no measurement revisions to this activity.

### **E. Data Collection Methodology**

The Agency has not modified its original data collection methodology.

### **F. Changes to Authorizations**

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

### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C (B)(5) which waives certain provisions of Sections 6(c)(4) of the 1937 Act and 24 CFR982.156. By receiving the authority to modify these provisions HACSB is able to achieve the statutory goal of achieving greater effectiveness in federal expenditures by earning more interest funds on its investments.



#### **Thoughtful Pennies Campaign.**

There is a lot we can learn from our kids! Around 20 elementary kids, from our Parkside Pine Public Housing Community in Colton, guided by Wendy Mascorro, Activities Coordinator, started the 'Thoughtful Pennies Campaign' to save pennies for children's charities like the Ronald McDonald House Charity. Their efforts were recognized by Assembly Member Wilmer Amina Carter who presented them with a jar of pennies and certificates of recognition.

## **Activity 12: Local Payment Standards**

### **A. Activity Description**

This activity was approved in our FY 2009 MTW Plan and it allows us to implement Local Payment Standards that accurately reflects the varying rental submarkets that exist across our County. San Bernardino County is the largest county in the contiguous United States by area, larger in area than each of the nine smallest states.



### **B. Activity Impact**

This activity has not been fully implemented therefore its impact cannot yet be measured. We have contracted with Applied Real Estate Analysis Inc. a third party real estate analysis firm to prepare a detailed study on the various rental submarkets that exist in our County. They are in the final stages of completing their research and submitting their report. We have started analyzing their data and are working closely to accurately define regions in our area. We have set a tentative implementation date of July 1, 2011 for this activity.

Baseline	Metric	Benchmark	Outcome
Current percentage of families residing in impacted areas	Percent of families that move to less impacted areas	1% of program families move to less impacted areas per year	Families have increased housing options in lower poverty areas.
Number of HCV landlords	Number of first time landlords in the program	25 first time landlords will execute HAP contracts each year	Families have increased housing options with new landlords.
Number of Class B or greater multi-family complexes currently accepting HCV	Number of Class B or greater multi-family apartment complexes accepting vouchers for the first time.	1 additional Class B or greater apartment complex will execute a HAP contract each year.	Families have increased housing options through additional apartment complexes.

### **C. Benchmark Achievement**

The benchmark achievement will be measured once this activity has been fully implemented.

### **D. Measurement Revisions**

There were no revisions to the baselines or the metrics.

### **E. Data Collection Methodology**

The Agency has not modified its data collection methodology.

## **F. Changes to Authorizations**

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

## **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through its Moving to Work Agreement, Attachment C D(2)(a) which waives certain provisions of Sections 8(o)(i), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13(H-I) of the 1937 Act. This Payment Standard Implementation plan replaces the federal regulations at 24 CFR 982.508, 982.503, 982.505 and 982.518. This activity addresses the MTW statutory objective to increase housing choices for low-income families. Without the waiver of the payment standard regulations we could not implement local payment standards which will improve housing opportunities for low-income families throughout the county of San Bernardino.

## **Activity 13: Local Inspection Standards**

### **A. Activity Description**

This activity was approved in our FY 2010 MTW Plan and it allows us 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.

### **B. Activity Impact**

This activity has not been fully implemented therefore its impact cannot yet be measured. However, we took significant steps toward implementing this activity in FY 2010 and are looking at a tentative implementation date of April 1, 2011. We worked extensively to determine the criteria for our Local Inspection Standards that will build on HUD's Housing Quality Standards. In addition, we sought input from our landlords and had a working session to discuss our new policies. The response from our landlords, represented by apartment complex managers and single family home owners, was very favorable and their input was included in our analysis. Our rating system will be set to Biennial, Annual and Fail for all inspections. The units that pass inspection on the first visit with no major violations will be put on a biennial schedule. Units that require a reinspection will not be eligible for biennial status and will remain on an Annual schedule. This activity will increase operational efficiencies and improve our housing choice for our participants by incentivizing landlords to maintain higher quality units on the program.

### **C. Benchmark Achievement**

The benchmark achievement will be measured once this activity has been implemented.



#### D. Measurement Revisions

The initial proposal for this activity had a rating criteria of letter grades (A, B, C) which has now been revised to Biennial, Annual and Fail. We also examined our metrics and have revised them to include baselines.

Initial Proposed Measurements				
Baseline Description	Baseline data	Metric	Benchmark	Outcome
Number of inspections by type	# of inspections conducted prior year by type	# of inspections conducted annually by type	Reduction in # of inspections conducted by type	Reduced inspections required
Staff time spent to conduct inspection	Actual average staff time to complete inspection by type prior year	Average staff time to complete inspections by type	Reduction in staff time to complete inspections	Reduced staff time to complete inspections
Number of properties by inspection type	Number of properties in each inspection type at end of base year	Number of properties in each category	Increase in A and B properties; elimination of D and F properties	Improved quality of housing units for participants

The revised metrics are as follows

Revised Measurements			
Baseline	Metric	Benchmark	Outcome
Percentage of inspections that qualify as biennial	Ratio of inspections that qualify for biennial to total inspections	33% of our portfolio will qualify for biennial inspections	Housing quality increases as landlords are incentivized to maintain units
Inspection hours spent per household is 1.35 hours	Inspection hours spent per household	Inspection hours spent per household is 1.08 hours in two years	Reduced total staff time to complete inspections

#### E. Data Collection Methodology

The Agency has not modified its data collection methodology.

#### F. Changes to Authorizations

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

#### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C (D)(5) which waives certain provisions of Sections 8(o)(8) of the 1937 Act and 24 CFR 982 Subpart I. This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures and to provide better housing options to low income families.

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

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

In our FY 2010 Plan, we were approved to implement a pilot work requirement for residents of the Medical Center Asset Management Project (AMP) and for incoming ports in the Housing Choice Voucher program. The Medical Center development is a traditional public housing development that has received an infusion of approximately \$8.1 million in capital funds consisting of Capital Fund Financing and competitive ARRA funds.

##### **B. Activity Impact –**

This activity was not fully implemented in FY 2010 so its impact cannot yet be fully measured. In FY 2010 we finalized the definition of work under this activity for our Medical Center residents. “Work” will encompass activities under three distinct groups: employment, activities leading to gainful employment and activities removing barriers to gainful employment. Participants can participate in activities removing barriers to gainful employment such as volunteer or medical treatment (e.g. substance abuse) for up to two years. Activities leading to gainful improvement are activities like vocational training, apprenticeships, certifications etc that help the individual acquire the skills and training to obtain gainful employment. We are in the process of completing an extensive needs assessment study at our community, in partnership with researchers at Loma Linda University, in order to facilitate services on site that meet the needs. We are also developing a Services Directory that will have a listing of local services. We have developed a Pilot Work Requirement Fact sheet to educate our families. The implementation date will be determined after completion of the needs assessment survey and analysis.

On August 1, 2010, we implemented the work requirement for all incoming ports in the Voucher Program. According to this policy, 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 reasonable driving distance, prior to the execution of the HAP contract and throughout their participation in our program. We have held conference calls with neighboring agencies to educate them about our MTW program and activities that affect ports. We also developed a Portability Fact Sheet, which is distributed to all agencies that request ports. We have seen a decrease in the number of incoming ports since implementation; however, do not have sufficient data to report on this metric.

Medical Center			
Baseline	Metric	Benchmark	Expected Outcome
# of current work-able residents engaged in a work related activity	Individuals engaging in work related activity	Increase of 50% per year for 2 years of individuals engaging in work related activities	Improved social conditions at the property.
Current average household rent charged	Average amount of monthly household rent	Increase of 2% per year in monthly household rent	Increased revenue to support property operations.
Current High school and middle school truancy rates	Middle and high school truancy rates	Decrease of truancy rate by 50% in high school and 75% in middle school.	Increased school attendance for students.
Current number of Negative/Positive articles in local paper	Number of Negative/Positive articles in local paper	Decrease by 25% of negative articles over two year period. Increase of 10% of positive articles over two year period.	Improved community perception.
Increase in adults enrolled in school or training	Number of adult residents enrolled in school or training	Increase by 20% per year for 2 years of adults in school or training program	More adults prepared for workforce.
Number of crimes committed on property (in base year)	Decrease in number of crimes committed on property.	Decrease by 20% per year.	Decreased crime on property.
Current number of community partners of HACSB for property.	Number of community partners.	Increase in number of partners by 3 per year for 2 years.	Strengthened partnerships.
Incoming Portability			
Baseline	Metric	Benchmark	Outcome
Number of incoming portability families who lease up in HACSB jurisdiction	Incoming portability families who lease up in HACSB jurisdiction	20% reduction of in-bound portability families who lease up in HACSB jurisdiction	Reduction in incoming portability families who lease up in HACSB jurisdiction
Average HAP payment for incoming portability families	Average HAP payment	Reduction of 30% in Average HAP payments for incoming portability families	Decrease in HACSB HAP Payments for incoming portability families.
Average adjusted annual income of incoming ports	Average annual adjusted income	Increase of 25% of average annual adjusted income over first two years.	Increase in average adjusted annual income.

**C. Benchmark Achievement –**

This activity was not fully implemented in FY 2010. As such we cannot yet measure achievement towards established benchmarks, but do anticipate meeting our goals within two years of implementation.

**D. Measurement Revisions**

There were no revisions to the baselines or the metrics.

**E. Data Collection Methodology –**

There are no revisions in the data collection methodology.

**F. Changes to Authorization –**

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

**G. Authorization Citation and Statutory Objectives –**

HACSB is authorized to undertake this initiative through Attachment C(C)(2), (C)(5), (D)(1)(g) and (D)(3)(b) which waives certain provisions of Section 6(c) and Section 8(r) of the 1937 Act and 24 CFR 960.201, 960.206, 982.516 and 982 Subparts E and H. This activity relates to the statutory objective to provide incentives to families to achieve self-sufficiency.

## VI. ONGOING ACTIVITIES

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

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

This activity was approved in our FY 2009 MTW Plan and it allows us to implement a Single Fund Budget with full flexibility that would combine Housing Choice Voucher, Public Housing Subsidy and Public Housing Capital funds.

#### **B. Activity Impact**

We developed our FY 2010 budget with one MTW fund combining all revenue sources from Housing Choice Vouchers, Public Housing and Capital Funds. On a monthly basis we monitored the actual revenue and expenses in comparison to budgeted revenue and expenses to ensure compliance by programs. There were no budget revisions and all programs remained compliant within the approved budget.

Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Shortfall or Excess in HCV	FY 2009 HCV operating shortfall of \$4,799,052	Dollar amount of shortfall/ Percentage of excess	No program has a shortfall and no program has an excess of more than 5%	The HCV program did not have a shortfall or excess of more than 5% for FY 2010.
Shortfall or Excess in Public Housing	FY 2009 Public Housing Operating shortfall of \$4,790,069	Dollar amount of shortfall/ Percentage of excess	No program has a shortfall and no program has an excess of more than 5%	The PH program did not have a shortfall or excess of more than 5% for FY 2010.

#### **C. Benchmark Achievement**

Our benchmark for both the HCV and PH program was achieved and the shortfall or excess was under 5% as anticipated. In order to ensure compliance by programs, we monitored the actual revenue and expenses in comparison to budgeted revenue and expenses on a monthly basis.

#### **D. Measurement Revisions**

There were no revisions to the baselines or the metrics.

#### **E. Data Collection Methodology**

The Agency has not modified its data collection methodology.

#### **F. Changes to Authorizations**

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

#### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C (B)(1) which waives certain provisions of Sections 8 and 9 of the 1937 Act and 24 CFR 982 and 990. This flexibility was needed to meet the statutory objective of expanding housing opportunities by providing the authority to combine funds from Sections 8 and 9 to develop a single fund budget. This single fund budget will allow the Agency to budget more effectively and increase housing offered to families throughout the term of our Moving to Work Agreement and specifically through our MTW Activities.

### **Activity 4: Biennial Recertifications**

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

This activity was approved in our FY 2009 MTW Plan and it allows us to conduct re-certifications every two years for elderly and disabled households that have no other adult members and for which there is no earned income for both the Public Housing and Housing Choice Voucher programs.

#### **B. Activity Impact**

This activity was implemented on October 1, 2009 and has generated reduction in staff time associated with processing recertifications. In the time study, our staff repeatedly mentioned the relief and reduced stress on our elderly participants due to this activity. Due to other activities like Elimination of Assets, Local Verification Policy etc. our average time to conduct recertification for eligible families dropped by 32% to 0.58 hours.

*Public Housing Program* – The total hours to complete the recertification were 111 (for the eligible families) which resulted in a savings of 195 hours annually. The number of families that completed recertification was 176 which is within margin of our 180 families benchmark.

*Voucher Program* – The total hours to complete the recertification were 664 (for the eligible families) which resulted in a savings of 1,560 hours annually. The number of families that completed recertification was 1,285 which is within margin of our 1,320 families benchmark. This activity resulted in time savings 1560 hours annually.

Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Total number of staff hours to complete recertification	306 hours for Public Housing; 2,224 hours for HCV in FY 2009. (0.85 hours to complete recertification)	Hours to conduct recertification for eligible families	153 hours to complete recertification in PH: 1122 hours for HCV. The benchmarks will be the same for all forthcoming years.	111 hours to complete recertification in PH: 664 hours in the Voucher Program



Actual number of families eligible to complete recertification packet bi-annually	360 eligible families in Public Housing; 2,640 in HCV.	Number of families completing packet annually.	Of total eligible families, 180 will complete packet annually and 1320 in HCV. The benchmarks will be the same for all forthcoming years	Of total eligible families, 176 in PH and 1285 in Voucher Program completed packet annually.
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### **C. Benchmark Achievement**

During the implementation of this activity we realized that our number of eligible families will change frequently due to families leaving and joining the program. We worked closely with our IT department and have provided staff with a link that updates eligible families on a daily basis. This will ensure that half of all eligible families were recertified in the first year of implementation and the other will be done in the next year. We are on track to complete this activity in FY 2011 and will continue monitoring it for accuracy.

### **D. Measurement Revisions**

There were no revisions to the baselines or the metrics.

### **E. Data Collection Methodology**

The Agency has not modified its data collection methodology.

### **F. Changes to Authorizations**

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

### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C (C)(4) which waives certain provisions of Sections 3(a)(1) and 3(a)(2) of the 1937 Act and 24 CFR 966.4 and 960.257 and Attachment C(D)(1)(c) which waives certain provisions of Section 8(o)(5) of the 1937 Act and 24 CFR 982.516. This authorization allows the Authority to meet the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures by implementing a reduced number of recertifications which will result in decreased costs and staff time devoted to other priorities.

## **Activity 5: Local Verification Policies**

### **A. Activity Description**

The activity was approved in our FY 2009 MTW Plan and the flexibilities granted through this activity allowed us to implement local verification policies for both the Public Housing and Voucher programs. For new admissions, documents provided by the applicant are verified with

no third party verification required. Verification for continued eligibility is first based on HUD's Enterprise Income Verification (EIV) reports and other up-front verifications, if available, then documents viewed, and third party verification for any discrepancies based on our local schedule of values established through our Administrative Plan.

## B. Activity Impact

This activity was fully implemented on October 1, 2009 and the simplified procedures have resulted in time savings in the verification process. The amount of time spent on verifications per participant decreased by 12% in Public Housing and 35% in the Voucher Program. The ease of verification was appreciated by staff and they noted elimination of third party saved time waiting for and following up on a response.

*Public Housing Program* – The total hours to process verifications was 962 which resulted in a savings of 171 hours annually. The benchmark of 705 hours has not been achieved but significant progress was made and we hope to achieve it within the next fiscal year.

*Voucher Program* – The total hours to process verifications was 3,693 which resulted in a savings of 2,121 hours annually. The benchmark of 3,875 was met in the Voucher Program.

Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Total number of staff hours to process verifications	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)	Hours to conduct verifications per family	705 hours to process verification in PH: 3,875 in HCV. The benchmarks will be the same for all forthcoming years.	Hours to process verifications: PH - 962 hours and Voucher – 3,693 hours
Income variation between documents viewed and third party confirmation for new applicants	Baseline to be set to zero	Dollar value of variation	The dollar variation between documents viewed and EIV is no more than 10%. The benchmarks will be the same for all forthcoming years.	First data measurements not available, will be available in FY 2011.

## C. Benchmark Achievement

In FY 2010 we were unable to achieve our target of 0.43 hours to process verifications per participant in Public Housing and the time spent was 0.61 hours. In the Voucher Program, we beat our benchmark of 0.53 hours per participant and measured 0.51 hours. We are also reexamining our verification process and are looking for ways to streamline it while ensuring accurate documentation.

The second metric measures the income variation between documents viewed and third party confirmations for new applicants. In FY 2010, we set up a brand new Program Integrity Unit that will handle this part of the metric. This unit will provide training, education and prevention tools to maintain compliance in all aspects of housing programs. We have just started leasing to new applicants and will start the verification in FY 2011. We plan to conduct random confirmation of documents viewed by moving to third party verification for 5% of all new admissions in FY 2011. We will measure the amount of income reported versus the amount of verified income using E.I.V. This will assist us in determining if reviewing documents provided by applicants provides completely accurate income information.

#### **D. Measurement Revisions**

The baseline for our second metric has been established and will be measured the first and third quarter of every fiscal year. We have decided to examine 5% of all new admissions for income variation. This will be conducted by our new Program Integrity Division. Since we have just started pulling from our waiting list and do not have any current new admissions, the baseline will be set to zero. In April 2010, we began pulling from our waiting list and plan to lease at least 600 new units through FY 2011. This will provide us with a fair sample to set the baselines for this activity and ensure program integrity.

#### **E. Data Collection Methodology**

The Agency has not modified its data collection methodology.

#### **F. Changes to Authorizations**

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

#### **F. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C (C)(4) and (11) which waives certain provisions of Sections 3(a)(1), 3(a)(2), 3(a)(3)(A) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.634, 960.255, 966.4 and 960.257 and Attachment C(D)(1)(c) and (3)(b) which waives certain provisions of Section 8(o)(5) and 24 CFR 982.516 and 982 Subpart E. Through this regulatory waiver HACSB is able to meet the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures by performing fewer time consuming and as a result costly, income verifications.

### **Activity 6: Elimination of Assets**

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

This activity was approved in our FY 2009 MTW Plan and it eliminated using assets in the calculation of tenant rent for our residents in both the Voucher Program and the Public Housing Program. Information related to assets is no longer collected and income from assets is not considered as part of the rent calculation formula. The elimination of assets from the rent calculation was effective October 1, 2009.

### **B. Activity Impact**

This activity was fully implemented in FY 2010 and has generated staff time reductions which have been verified by our second and fourth quarter time studies. This activity has simplified the rent calculation process since staffs no longer have to collect data on assets nor input them in the assets table within our software system.

*Public Housing Program* – The total hours to process assets was zero which resulted in a savings of 178 hours annually. The benchmark of zero hours has been achieved.

*Voucher Program* – The total hours to process assets was zero which resulted in a savings of 1,300 hours annually. The benchmark of zero hours was met in the Voucher Program.

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

### **C. Benchmark Achievement**

The benchmarks were achieved in FY 2010 and staff spent zero hours in calculating asset income for both the Voucher and Public Housing Program. This activity has been completed in FY 2010 and no hardship requests were received for this activity.

### **D. Measurement Revisions**

There were no revisions to the baselines or the metrics.

### **E. Data Collection Methodology**

The Agency has not modified its data collection methodology.

### **F. Changes to Authorizations**

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

### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this activity through Attachment C (C)(11) which waives certain provisions of Section 3(a)(2), 3(a)(3)(A) and Section 6(l) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.634 and 960.255 and 966 Subpart A and Attachment C (D)(2)(a) which waives certain provisions of Sections (8)(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and

8(o)(13)(H)-(I) of the 1937 Act and 24 CFR 982.508, 982.503 and 982.518. This activity addresses the MTW statutory objective to reduce costs and achieve greater costs effectiveness in federal expenditures.

### **Activity 7: Controlled Program Moves**

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

This activity was approved in our FY 2009 MTW Plan and it has limited voluntary program moves for Voucher participants to once every two years, only at the time of annual re-certification and upon verification from their current landlord that they are a tenant in good standing. We have established exceptions to this policy, like permitting moves for reasonable accommodations and self-sufficiency activities. The new controlled program move policy will be effective only upon execution of a new HAP contract at the time of a program move for current participants and upon initial lease up for applicants.

#### **B. Activity Impact**

This activity was implemented on February 1, 2010 so its full impact cannot be accurately measured. Also, the limitation on moves will not become effective until after a family moves, a new HAP contract with a two year term is executed with the landlord, and an HACSB MTW Voucher is signed by the participant. Since the limitation on program moves will become effective after the participant's next move, time savings from this activity will be realized over a longer period of time. In an effort to better inform our families about this policy, we have changed our move briefing process. Families are first required to attend a pre briefing to enlighten them about the new Program Moves Policy. They are also informed about costs associated with moves and educated about other MTW activities and how it affects them. Families that qualify and decide to move are then required to attend a move briefing where they are issued a voucher. This has added time to our move process, but we feel it gives us a chance to explain the process and answer any questions. Prior to implementing this activity, the average staff time to process a move was 4.8 hours; however, the additional time spent with families has increased that to 5.7 hours.

Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Percent of total voluntary program moves each year	12.7% of participants moved voluntarily in FY 2009	Percent of families that voluntarily move each year	No more than 4% of total participants move voluntarily each year. The benchmark will remain the same for all forth-coming years.	16.8% of participants moved voluntarily in FY 2010
Number of staff hours spent annually processing program moves	4,599 hours to process program moves annually (4.8 hours per move).	Hours to process a program move	1448 hours spent to process moves annually.	7,125 hours to process program moves annually

### **C. Benchmark Achievement**

The benchmarks were not achieved in FY 2010 and will not be seen immediately since it is not effective until a family moves. We have however seen a 29% drop in the number of families attending a pre briefing and then coming to the move briefing. This shows that the briefings are informative and gives our families an opportunity to make an informed decision.

### **D. Measurement Revisions**

There were no revisions to the baselines or the metrics.

### **E. Data Collection Methodology**

The Agency has not modified its data collection methodology.

### **F. Changes to Authorizations**

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

### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C, D 1.a and b and D 2.b which waives certain provisions of Sections 8(o)(7)(a), 8(o)(13)(G) and 8(o)(13)(F) of the 1937 Act and 24 CFR 982.303, 982.308, 982.309, 982.451 and 983 Subpart E and F. This activity addresses the MTW statutory objective to reduce costs and achieve greater cost effectiveness in federal expenditures by limiting the frequency of elective program moves which will save staff time that can be devoted to other critical activities.

## **Activity 8: Local Policies for Portability**

### **A. Activity Description**

Through this activity that was approved in our FY 2009 MTW Plan, we can apply all MTW requirements to inbound and outbound portability participants. HCV participants porting into San Bernardino County are required to comply with HACSB's MTW policies and requirements. On August 1, 2010, we implemented a Work Requirement to our Portability Policy. According to the Work Requirement for Portability, all eligible household members of the incoming portability family must be employed for at least 15 hours per week in our County or within a reasonable driving distance prior to the execution of the HAP contract.

### **B. Activity Impact**

This activity was implemented on October 1, 2009 and the Work Requirement portion was effective August 1, 2010. There has been a decrease in the number of port-ins and port outs in FY 2010. HACSB took great efforts to educate neighboring agencies and participants about our new policy. We scheduled conference calls with the agencies and distributed fact sheets that explained applicable requirements. We feel that the decrease in port ins has been in part due to the MTW requirements like Controlled Program Moves, Minimum Rent and the Work requirement. Another reason for the decrease could be the weak economy which may restrict participants from undertaking the expenses associated with moving.



The time spent to process in bound ports has decreased by 23% and the time for out bound ports has decreased by 54%. We plan to continue educating participants and agencies about our policies and provide fact sheets that explain our program.

Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Average staff time spent to process in-bound portability	2,004 hours to process in-bound ports in FY 2009	Hours to process inbound portability	1002 hours to process in-bound ports. The benchmark will be the same for all forthcoming years.	1,544 hours to process in-bound ports in FY 2010
Average staff time spent to process out-bound portability	319 hours to process out-bound ports in FY 2009	Hours to process out-bound portability	160 hours to process out-bound ports. The benchmark will be the same for all forthcoming years.	146 hours to process out-bound ports in FY 2010
Percent of HAP and Admin Fee Accounts Receivable due to untimely payments from Receiving PHA's	\$257,488, which is .36% of the HAP and Admin Fee accounts were receivables due from PHAs for portability	Percent of annual HAP receivable from portability	Portability receivables – FY 2010 -\$244,613: FY 2011 – \$232,383 FY 2012 –\$220,764 FY 2013 – \$209,725 FY 2014 - \$199,239	Portability receivables – FY 2010 - \$109,328 which is 0.16% of the HAP and Admin Fee.

### C. Benchmark Achievement

The benchmarks for staff time spent processing out bound ports and percent of accounts receivable due to untimely payments from receiving PHA's was achieved in FY 2010. The desired outcome for time spent processing inbound ports was not met, but considerable progress was made and we are sure to achieve the goal in FY 2011. The total hours saved processing in bound ports were 460 hours and processing outbound ports were 173 hours for a total of 633 hours due to this activity. In FY 2010, we absorbed 480 of our port ins, which helped us achieve our fifth year benchmark in the portability accounts receivable metric.

### D. Measurement Revisions

There were no revisions to the baselines or the metrics.

### E. Data Collection Methodology

The Agency has not modified its data collection methodology.

## **F. Changes to Authorizations**

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

## **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this activity through Attachment C (D)(1)(g) which waives certain provisions of Section (8)(r) of the 1937 Act and 24 CFR 982 Subpart H. 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 by requiring families who port in or outside of HACSB's jurisdiction to adhere to the same guidelines as all other HACSB program participants.

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

#### **A. Activity Description –**

This activity was approved in our FY 2009 MTW Plan and it eliminated the HUD Mandatory Earned Income Disallowance (MEID) from the calculation of total tenant payment. However, any participants who were receiving EID prior to the implementation date were allowed to continue to receive the disallowance through September 30, 2011 or until their eligibility for EID expires, whichever comes first. This activity became effective on October 1, 2009 for participants in the Housing Choice Voucher and Public Housing programs.

#### **B. Activity Impact –**

The anticipated impact of this activity was to provide opportunities to families to increase their self-sufficiency by better mirroring financial incentives in the unsubsidized housing portfolio. We are still in the first year of activity implementation and will continue to measure the outcomes throughout the next year.

*Public Housing Program* – In this program, eighteen out of 31 participants continued to have earned income after the expiration of EID. Six participants are still on EID and two did not have earned income. In addition, five participants left the program so we could not include them in our study. The time savings related to this activity will be seen in FY 2011 since all participants had EID in FY 2010. According to our time studies, it took a total of 38.2 hours in our PH program which resulted in a savings of 14.5 hours.

*Voucher Program* – In the Voucher program, three out of five participants continued to have earned income after the expiration of EID. The benchmark we anticipated in two years was surpassed in Year One. The time savings related to this activity will be seen in FY 2011 since all participants had EID in FY 2010. According to our time studies, it took a total an additional two hours or 7.7 total hours processing EID. This was primarily due to additional time spent explaining EID calculations to program participants.

Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Public Housing participants receiving EID with earned income	31 Public Housing participants receiving EID with earned income	Families that retain earned income	15 families will retain earned income upon expiration of EID	18 families retained earned income after expiration of EID
HCV participants receiving EID with earned income	5 HCV participants receiving EID with earned income	Families that retain earned income	2 families will retain earned income upon expiration of EID	3 families retained earned income after expiration of EID
Total staff hours to manage EID in Public Housing	52.7 total hours spent in FY 2009 to manage EID in Public Housing	staff time to manage EID	Zero hours in staff time spent to manage EID in PH.	38.2 total hours spent in FY 2010 to manage EID in PH
Total staff hours to manage EID in HCV	5.7 total hours spent in FY 2009 to manage EID in HCV	staff time to manage EID	Zero hours in staff time spent to manage EID in HCV.	7.7 total hours spent in FY 2010 to manage EID in HCV

#### **C. Benchmark Achievement –**

The activity has a two year timeline but the first benchmark was met in FY 2010. Three additional families in PH and one additional family in the Voucher Program retained their earned income after the expiration of EID. The time savings related to this activity will not be met until the expiration of EID for all participants.

#### **D. Measurement Revisions -**

There were no revisions to the baselines or the metrics. We did not receive and hardships requests for this activity

#### **E. Data Collection Methodology –**

There are no revisions in the data collection methodology as stated in the FY 2011 Annual Plan.

#### **F. Changes to Authorization –**

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

#### **G. Authorization Citation and Statutory Objectives –**

HACSB is authorized to undertake this initiatives through Attachment C, D 1.a and b and D 2.b which waives certain provisions of Sections 8(o)(7)(a), 8(o)(13)(G) and 8(o)(13)(F) of the 1937

Act and 24 CFR 982.303, 982.308, 982.309, 982.451 and 983 Subpart E and F. 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 by removing a cumbersome income disregard and replacing it with other simplified self-sufficiency activities throughout the term of HACSB's MTW Agreement.

### **Activity 10: Minimum Rent**

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

This activity was approved in our FY 2009 MTW Plan and it allowed us to increase the minimum rent from \$50.00 to \$125.00 per month for all households in both the Public Housing and the Voucher Program.

#### **B. Activity Impact**

This activity was fully implemented in FY 2010 by increasing the minimum rent from \$50.00 to \$125.00. Given the current economic conditions, we did expect a number of hardship requests; however we received only 9 hardship requests. Unfortunately, eight did not meet the established criteria and only one public housing family was granted the waiver. This shows that our residents are ready for the challenge and are working on ways to increase self sufficiency.

HACSB is always looking for ways to help our families overcome their barriers and achieve self-sufficiency. HACSB was awarded the competitive Broadband Technologies Opportunities Program (BTOP) grant that allowed us to expand our existing computer centers and provide high speed internet access along with free classes in basic computer skills, valuable career education and job counseling. We also co-sponsored a Youth job fair and provide our residents with a monthly *Resourceful Job Hunter* directory.



**An interview skill building session at a Youth job fair.**

Initial Proposed Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Percent of Public Housing families TTP <\$125.00	9.4% of Public Housing families have TTP <\$125.	Percent of households at minimum rent	8.4% of PH families with TTP<\$125,000	1% reduction in the number of households paying minimum rent
Percent of HCV families with TTP <\$125.00	8.6% of HCV families have TTP <\$125	Percent of households at minimum rent	7.6% of HCV families with TTP<\$125.00	1% reduction in the number of households paying minimum rent
HCV Current earned income from households with TTP <\$125	HCV current earned income from households with TTP <\$125 is \$786,228	Aggregate amount of earned income from households with TTP <\$125	HCV current earned income from households with TTP<\$125.00 is \$864,851.	Increased earned income of households
PH current earned income from households with TTP < \$125	PH current earned income from households with TTP <\$125 is \$422,501	Aggregate amount of earned income from households with TTP <\$125	PH current earned income from households with TTP<\$125.00 is \$464,751.	Increased earned income of households
Reduced HAP expense in HCV for households with TTP<\$125.00	Monthly HCV HAP expense for families with TTP <\$125 is \$462,320*	Monthly percentage decrease in HAP expense	Monthly HAP expenses in HCV f or families with TTP <\$125 is \$434,581	Additional revenue available to meet other local goals and assist more families
Increase rental revenue in Public Housing from households with TTP<\$125.00	Current PH rental revenue from families with TTP<\$125 is \$11,383	Monthly percentage increase in rental revenue	PH rental revenue from minimum rent households is \$17,074	Additional revenue available to meet other local goals and assist more families

Upon reviewing our metrics for this activity, we felt they do not truly measure the impact on our families that are working towards self sufficiency. We replaced measuring simply the increase in earned income of families on minimum rent with a mean to better reflect the changes by family. Also the reduced HAP in the Voucher Program and increase in rental income

on the PH program is redundant since the amount was increased from \$50.00 to \$125.00. We have reviewed our metrics and propose the following revised metrics.

REVISED Measurements				
Baseline Description	Baseline Data	Metric	Benchmark	Outcome
Percent of Public Housing families TTP <\$125.00	9.4% of Public Housing families have TTP <\$125.	Percent of households at minimum rent	8.4% of PH families with TTP<\$125,000	12.31% of Public Housing families have TTP <\$125
Percent of HCV families with TTP <\$125.00	8.6% of HCV families have TTP <\$125	Percent of households at minimum rent	7.6% of HCV families with TTP<\$125.00	9.83% of Voucher families have TTP <\$125
Average household income for PH minimum rent families with earned income	Average household income for PH minimum rent families with earned income is \$10,833	Average earned income in dollars	Average household income for PH minimum rent families with earned income increases to \$11,916	Average household income for HCV minimum rent families with earned income is \$9,967
Average household income for HCV minimum rent families with earned income	Average household income for HCV minimum rent families with earned income is \$7,917	Average earned income in dollars	Average household income for HCV minimum rent families with earned income increases to \$8,709	Average household income for HCV minimum rent families with earned income is \$5,143

### C. Benchmark Achievement

Due to various reasons like the current economic condition coupled with a higher than average unemployment rate, we were unable to meet our benchmarks. We actually saw an increase in the number of families on minimum rent due to loss of employment or cutbacks that resulted in decreased wages. We are confident that in time, we will achieve our proposed benchmarks and are taking efforts to help our families and the community. In June 2010, in conjunction with other community partners and agencies, we co-sponsored a, "Today's Youth, Tomorrow's Future Job Fair" that was attended by nearly 300 youth. There were over 30 agencies and organizations present and employers recruited potential employees on site. As mentioned in the Activity Impact section, we have also partnered with the Career Institute, which will serve as a valuable resource to our community.



#### **D. Measurement Revisions**

We have submitted a proposed revision to our metrics in an effort to accurately measure the impact on our families.

#### **E. Data Collection Methodology**

The Agency has not modified its original data collection methodology.

#### **F. Changes to Authorizations**

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

#### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C, C.11 which waives certain provisions of Section 3(a)(2), 3(a)(3)(A) and Section 6(l) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.634, and 960.255 and 966 Subpart A and Attachment C, D2(a) which waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 CFR 982.508, 982.503 and 982.518. 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.

#### **Activity 11: Local Project Based Voucher**

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

This activity was approved in our FY 2009 MTW Plan and it allows us to implement a local Project Based Voucher (PBV) program to increase the availability of quality housing units. Our third amendment to the FY 2010 MTW Annual Plan helped clarify the components of our local program.

##### **B. Activity Impact**

On September 15, 2010, we exercised the flexibility under this activity and executed a project based voucher HAP contract for 53 units at the new Vista del Sol senior housing community, which is owned by our affiliate nonprofit, Housing Partners I, Inc.

In the future, we plan to allocate PBV to 308 public housing units that were approved by HUD on June 9, 2010 to be disposed to our affiliate nonprofit, Housing Partners I, Inc. We received the replacement tenant protection vouchers on October 1, 2010 and are currently in the process of finalizing the disposition and hope to complete the process by March 2010.

Baseline	Metric	Benchmark	Outcome
3.76% of MTW Fund Budget is allocated for PBV	Percentage of MTW Fund Budget allocated for PBV	3% increase of MTW Fund Budget allocated for PBV annually	3.89% of the MTW Fund Budget was allocated to PBV

Current number of Public Housing disposition families remaining in wrong sized unit- over-housed (84) and under-housed (14).	Number of Public Housing disposition families in wrong sized unit	Less than 50% of current families will remain in the wrong sized units	Families will move to appropriately sized units
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### **C. Benchmark Achievement**

Since the disposition did not occur by September 30, 2010, we cannot fully measure the metrics for this activity. We are hoping to report accurate metrics in our MTW Annual Plan in July 2011.

### **D. Measurement Revisions**

There were no revisions to the baselines or the metrics.

### **E. Data Collection Methodology**

The Agency has not modified its data collection methodology.

### **F. Changes to Authorizations**

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

### **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through Attachment C, Section D.7. of the MTW Agreement. This activity addresses the MTW statutory objective to increase housing choices for low income families.

## **Activity 14: Local Asset Management Program**

### **A. Activity Description**

This activity was first described in the MTW FY 2010 Plan and was then amended in our FY 2010 Plan - Amendment 3, approved on September 15, 2010. Through this activity, we will ensure full fungibility of the MTW block Grant by allowing transfers among AMPS and allowing us to charge an asset management fee regardless of whether a project has excess cash.

### **B. Activity Impact**

Asset management fees were charged to all AMPs at the end of FY 2010 and 3 AMP's were ineligible to pay the fees based on negative excess cash. AMP 208 and AMP 209 were ineligible to pay fees and were disposed of on December 1, 2010. HACSB had analyzed these properties and concluded that these scattered site properties cost at least twenty to twenty five percent more to operate than other comparable units due to staff transportation costs, unproductive staff time related to travel to sites, lack of standardization of building and unit components and other factors. AMP 203 was also ineligible to pay fees based on negative excess cash. This housing community is undergoing major rehabilitation with an infusion of nearly \$7 million in capital improvements. The various projects funded from sources like ARRA and California's

solar initiative Multifamily Affordable Solar Housing (MASH), will decrease maintenance and utility costs which will help the overall financials of the property. While there are many factors that affect the cash flow of an AMP, a major issue is the collection loss write offs which increase given the current economic conditions and high unemployment rate. The bulk of involuntary vacancies are due to reasons like nonpayment of rent, crime and other lease violations which are directly related to the economic conditions. Our current 14 day notice procedure amounts into a substantial amount of unpaid rent and higher eviction costs. The back up in the court systems adds to time to our eviction process which leads to a larger unpaid rent and may be the cause of more damages to the unit. In the FY 2011 MTW Plan, we were approved for the Property Management Innovation activity which will help address some of these issues. Some of the flexibilities granted are –

- Replace the current 14 day notice with a three day notice to pay or vacate the property.
- Increase the NSF fees.
- Raise the security deposit to one month's flat rent and implement a holding deposit that will be transferred to the security deposit if unit is selected.
- Security deposit incentives for no move out damages in an effort to reduce vacancy turnaround costs.

Baseline Description	Baseline Data	Metric	Benchmark	Outcome
AMPs that are ineligible to pay asset management fee based on negative excess cash	In FY 2009, 3 AMPs were ineligible to pay asset management fee based on negative excess cash	Number of AMPs ineligible to pay asset management fee based on negative excess cash	All AMPs will be eligible to pay asset management fee	In FY 2010, 3 AMPs were ineligible to pay asset management fee based on negative excess cash

### C. Benchmark Achievement

As mentioned in the Activity Impact section above, we were unable to meet the benchmark in FY 2010. We are looking forward to the implementation of our Property Management Innovation Activity in FY 2011 and hope for better results in the next report.

### D. Measurement Revisions

There were no revisions to the baselines or the metrics.

### E. Data Collection Methodology

The Agency has not modified its data collection methodology.

## **F. Changes to Authorizations**

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

## **G. Authorization Citation and Statutory Objectives**

HACSB is authorized to undertake this initiative through the First Amendment of the MTW Agreement which deleted Section II.F. of the Amended and Restated Agreement and replaced it with 6. Local Asset Management Program within MTW. This activity addresses the MTW statutory objective to reduce costs and achieve greater effectiveness in federal expenditures.

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

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

This activity was approved through an amendment to our FY 2010 Plan. Vista del Sol is a new 71 unit affordable senior housing community developed by HACSB's affiliated non-profit, Housing Partners I Inc. Through a combination of funding received from the County of San Bernardino Neighborhood Initiative Program funds, the City of Redlands Redevelopment funds, HUD HOME funds (through the County of San Bernardino) and a loan from HACSB, approximately 75% of the development is affordable to households at no more than 80% of Area Median Income. HUD approved a temporary operating subsidy of approximately \$134,000 from our MTW block grant funds to make the units affordable to low income seniors.

#### **B. Activity Impact**

An initial analysis of the Vista del Sol waiting list showed that the average amount of rent that applicants could afford was far below the HOME rents for these beautiful units. The rents were between \$397 and \$441 higher than what was affordable to the low income seniors on the waiting lists. In order to meet this gap, HACSB requested an operating subsidy to serve the families well under 80% of AMI. The operating subsidy, approved by HUD through our Use of Funds Application and subsequent Amendment to the FY 2010 MTW Plan, ensured the financial feasibility of this development and that seniors were able to afford the rents on their units until the availability of Project-Based Vouchers. On September 15, 2010, we executed a Project Based Voucher contract, thus no longer required the operating subsidy.

<b>Baseline</b>	<b>Metric</b>	<b>Benchmark</b>	<b>Outcome</b>
The total projected operating budget shortfall is zero dollars	Dollar amount of shortfall	Zero operating budget shortfall on a monthly basis	Zero operating budget shortfall on a monthly basis
Average income for Vista del Sol tenants is \$14,786	Average income of each tenant	Zero seniors are served by operating subsidy who have incomes over 80% of AMI	Zero seniors served by operating subsidy had incomes over 80% of AMI

**C. Benchmark Achievement –**

The 53 units were project based on September 15, 2010 as a result the subsidy was used from April 23, 2010 to September 14, 2010. The total subsidy spent was \$116,416 out of the \$134,000 that had been budgeted so we were under budget by \$17,584. All the seniors served had income levels below 80% of AMI. Lorene Neal, a resident of Vista del Sol, is a good example of how this flexibility made dreams come true for some seniors. She had fallen in hard times and was living with different relatives since she could not afford a place of her own. She was one of our first residents and her words summed it up best, “I just felt like God answered my prayers. I’m just so blessed to have a home.” Ms. Neal’s story was profiled in the local *‘Redlands Daily Facts’* newspaper.

This activity met the benchmark requirements and is complete.

**D. Measurement Revisions -**

There were no revisions to the baselines or the metrics.

**E. Data Collection Methodology –**

There are no revisions in the data collection methodology.

**F. Changes to Authorization –**

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

**G. Authorization Citation and Statutory Objectives –**

HACSB is authorized to undertake this initiative through Attachment D of the Moving to Work Agreement This activity addresses the MTW statutory objective to increase housing options for low-income families.

## VII. SOURCES AND USES OF FUNDS

### A. Planned vs Actual Sources and Uses of MTW Funds

- a. Planned versus Actual Sources and Uses of MTW funds – The chart below summarizes the HACSB Consolidated MTW Budget and Actuals for the Fiscal Year 2010 (October 1, 2009 through September 30, 2010). The chart lists all budgeted and actual revenues and expenditures for all funding sources that comprise the MTW Block Grant Funds including Section 9 Operating Funds; Section 9 Capital Fund; Section 8 Housing Choice Voucher (HCV) Housing Assistance Payments; and Section 8 HCV Administrative Fees.

CONSOLIDATED SOURCES AND USES OF MTW FUNDS (FISCAL YEAR 2010)				
REVENUE (SOURCES)	BUDGET	ACTUAL	VARIANCE	VARIANCE %
HCV Program HAP	61,618,448	66,361,683	4,743,235	7.70%
HCV Program Admin Fees	6,498,032	6,038,332	-459,700	-7.07%
Public Housing Operating Fund	5,270,159	6,251,775	981,616	18.63%
Public Housing Capital Fund (a)	8,024,458	5,074,513	-2,949,945	-36.76%
Rental Income	5,380,227	5,127,496	-252,731	-4.70%
Miscellaneous Income (b)	588,146	1,153,662	565,516	96.15%
Investment Income (c)	523,342	10,799	-512,543	-97.94%
<b>TOTAL REVENUE</b>	<b>\$87,902,812</b>	<b>\$90,018,260</b>	<b>\$2,115,448</b>	<b>2.41%</b>
<b>EXPENSE (USES)</b>				
Administration and General Expense	14,450,451	13,194,192	1,256,259	8.69%
Utilities	1,344,234	1,484,636	-140,402	-10.44%
Operations and Maintenance	6,946,388	7,263,051	-316,663	-4.56%
Housing Assistance Payments	61,618,448	60,139,497	1,478,951	2.40%
Development and Capital Projects (d)	3,543,291	0	3,543,291	100.00%
<b>TOTAL EXPENSE</b>	<b>\$87,902,812</b>	<b>\$82,081,376</b>	<b>\$5,821,436</b>	<b>6.62%</b>
<b>OPERATING INCOME/(LOSS)</b>	<b>0</b>	<b>7,936,884</b>	<b>7,936,884</b>	
Reserve Buildup (Unrestricted)	<b>0</b>	<b>-7,936,884</b>	<b>-7,936,884</b>	
Reserve Drawdown (pre CY 2008 restricted HAP reserves)	<b>0</b>	<b>0</b>	<b>0</b>	
<b>NET INCOME/LOSS</b>	<b>0</b>	<b>0</b>	<b>0</b>	

### Explanation of Variances Over/(Under) 20%:

- (a) HACSB requisitions Public Housing Capital Funds after expenses have been incurred

- (b) Miscellaneous Income includes \$389,550 in Public Housing Home Sales which was not budgeted. In addition, HACSB collected an additional \$101,555 than budgeted in fraud recovery.
- (c) Investment policy was approved on FY 2010-2011; therefore, a higher return on investment is expected during FY 2010-2011.
- (d) Development and Capital Projects are included in the Statement of Net Assets as Work in Progress. These on-going costs do not get reflected in the Statement of Operations.

**b. Planned vs Actual Sources and Uses of Non-MTW funds** - The chart below summarizes the HACSB Consolidated Budget and Actuals for Non-MTW funds for the Fiscal Year 2010 (October 1, 2009 through September 30, 2010). This chart lists all planned and actual revenues and expenditures for all funding sources for other funds that are not eligible MTW Block Grant funds (including VASH, Mainstream, state, local and central office cost center funds).

<b>CONSOLIDATED SOURCES AND USES OF NON- MTW FUNDS (FISCAL YEAR 2010)</b>			
<b>REVENUE (SOURCES)</b>	<b>BUDGET</b>	<b>ACTUAL</b>	<b>VARIANCE</b>
Grants	3,861,699	9,111,895	5,250,196
Rental Income (a)	8,329,954	9,101,745	771,791
Investment Income	825,786	332,379	-493,407
Miscellaneous Income	1,409,791	425,201	-984,590
<b>TOTAL REVENUE</b>	<b>\$14,427,230</b>	<b>\$18,971,220</b>	<b>\$4,543,990</b>
<b>EXPENSE (USES)</b>			
Administration and General Expense	2,563,767	7,412,133	-4,848,366
Utilities	608,712	733,425	-124,713
Operations and Maintenance	4,487,020	5,743,480	-1,256,460
Extraordinary Maintenance	169,370	71,843	97,527
Housing Assistance Payments	3,279,756	2,286,048	993,708
<b>TOTAL EXPENSE</b>	<b>\$11,108,625</b>	<b>\$16,246,929</b>	<b>\$(5,138,304)</b>
<b>OPERATING INCOME/(LOSS)</b>	<b>\$3,318,605</b>	<b>\$2,724,291</b>	<b>\$(594,314)</b>
Reserve Buildup	3,318,605	2,724,291	-594,314
<b>NET INCOME/LOSS</b>	<b>0</b>	<b>0</b>	<b>0</b>

(a) Rental Income is from Authority Owned Portfolio



- B. Planned vs Actual Sources and Uses of State/Local Funds** – The chart below summarizes the HACSB State and Local Budget and Actuals for the Fiscal Year 2010 (October 1, 2009 through September 30, 2010). The chart lists all planned and actual revenues and expenditures for all funding sources that comprise State and Local operating activities.

<b>SOURCES AND USES OF STATE AND LOCAL FUNDS (FISCAL YEAR 2010)</b>			
<b>REVENUE (SOURCES)</b>	<b>BUDGET</b>	<b>ACTUAL</b>	<b>VARIANCE</b>
Rental Income	550,070	554,573	4,503
Investment Income	66	4,247	4,181
Miscellaneous Income	11,288	69,496	58,208
<b>TOTAL REVENUE</b>	<b>\$561,424</b>	<b>\$628,316</b>	<b>\$ 66,892</b>
<b>EXPENSE (USES)</b>			
Administration and General Expense	175,311	223,927	(48,616)
Utilities	69,972	72,479	(2,507)
Operations and Maintenance	300,934	340,046	(39,112)
<b>TOTAL EXPENSE</b>	<b>\$546,217</b>	<b>\$636,452</b>	<b>\$ (90,235)</b>
<b>OPERATING INCOME/(LOSS)</b>	<b>15,207</b>	<b>-8,136</b>	<b>(23,343)</b>
Reserve Buildup/(Draw)	15,207	-8,136	(23,343)
<b>NET INCOME/LOSS</b>	<b>0</b>	<b>0</b>	<b>\$ -</b>

- C. Planned vs Actual Sources and uses of Central Office Cost Center Funds** – The chart below summarizes the HACSB Central Office Cost Center Budget and Actuals for the Fiscal Year 2010 (October 1, 2009 through September 30, 2010). The chart lists all planned and actual revenues and expenditures for all central office cost center operations.

<b>SOURCES AND USES OF CENTRAL OFFICE COST CENTER (FISCAL YEAR 2010)</b>			
<b>REVENUE (SOURCES)</b>	<b>BUDGET</b>	<b>ACTUAL</b>	<b>VARIANCE</b>
Management Fees	4,421,092	5,064,197	643,105
Miscellaneous Income	628,481	233,783	-394,698
<b>TOTAL REVENUE</b>	<b>\$5,049,573</b>	<b>\$5,297,980</b>	<b>248,407</b>
<b>EXPENSE (USES)</b>			
Administration and General Expense	4,691,375	4,912,863	-221,488
Utilities	38,674	78,596	-39,922
Operations and Maintenance	856,622	199,692	656,930
<b>TOTAL EXPENSE</b>	<b>\$5,586,671</b>	<b>\$5,191,151</b>	<b>\$395,520</b>
<b>OPERATING INCOME/LOSS</b>	<b>-537,098</b>	<b>106,829</b>	<b>643,927</b>
Operating Transfers In/(Out)	537,098	6,028,848	5,491,750
<b>NET INCOME/(LOSS)</b>	<b>0</b>	<b>6,135,677</b>	<b>6,135,677</b>

**D. Cost Allocation or Fee for Service Methodology** – HACSB utilized the HUD prescribed Fee for Service approach with no deviations for FY 2010.

**E. Planned vs Actual Use of Single Fund Flexibility –**

Operating Subsidy for Vista del Sol

Vista del Sol is a 71 unit affordable senior housing community developed by HACSB's affiliated non-profit, Housing Partners I Inc. HUD approved a temporary operating subsidy of approximately \$134,000 from our MTW block grant funds to make nearly 75% of the units affordable to low income seniors, for a period of approximately five months, until the units were project based. On September 15, 2010, we executed a Project Based Voucher contract for 53 units and no longer required the operating subsidy. The subsidy was used from April 23, 2010 to September 14, 2010 in the amount of \$116,416, under budget by \$17,584.

## VIII. ADMINISTRATIVE

- A. Description of Deficiencies** – No deficiencies to report.
- B. Results of Agency-directed Evaluations** – Not applicable. HACSB has not conducted any Agency-directed evaluations.
- C. Performance and Evaluation Report for non-MTW Block Grant Capital Fund** – Included in Attachment C.
- D. Statutory Requirements Certification** – HACSB certifies that it has met the three statutory requirements. The Authority certifies that at least 75 percent of the families assisted by the Agency are very low income, that substantially the same total number of eligible low income families are being served and that a comparable mix of families has been maintained.

**APPENDIX A: LIST OF MTW ACTIVITIES**

<b>ACTIVITY</b>	<b>DESCRIPTION</b>	<b>STATUTORY OBJECTIVE</b>	<b>PLAN YEAR</b>
<b>Activity 1</b>	Single Fund Budget	Operational Efficiency	FY 2009
<b>Activity 2</b>	Strategic Investment Policies	Operational Efficiency	FY 2009
<b>Activity 3</b>	Alternate Assessment Program	Operational Efficiency	FY 2009
<b>Activity 4</b>	Biennial Recertifications	Operational Efficiency	FY 2009
<b>Activity 5</b>	Local Verification Policies	Operational Efficiency	FY 2009
<b>Activity 6</b>	Elimination of Assets	Operational Efficiency	FY 2009
<b>Activity 7</b>	Controlled Program Moves	Operational Efficiency	FY 2009
<b>Activity 8</b>	Local Policies for Portability	Self-Sufficiency	FY 2009
<b>Activity 9</b>	Elimination of Earned Income Disallowance	Self-Sufficiency	FY 2009
<b>Activity 10</b>	Minimum Rent	Self-Sufficiency	FY 2009
<b>Activity 11</b>	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009
<b>Activity 12</b>	Local Payment Standards	Expanding Housing Opportunities	FY 2009
<b>Activity 13</b>	Local Inspection Standards	Operational Efficiency	FY 2010
<b>Activity 14</b>	Local Asset Management Program	Operational Efficiency	FY 2010
<b>Activity 15</b>	Pilot Work Requirement	Self-Sufficiency	FY 2010
<b>Activity 16</b>	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010
<b>Activity 17</b>	Local Income Inclusion	Self-Sufficiency	FY 2011
<b>Activity 18</b>	Property Management Innovation	Operational Efficiency	FY 2011
<b>Activity 19</b>	Pilot Local FSS program	Self-Sufficiency	FY 2011
<b>Activity 20</b>	Term Limits	Self-Sufficiency	FY 2011

## **APPENDIX B: PERFORMANCE AND EVALUATION REPORTS**

Attached are the Performance and Evaluation Reports for the following non-MTW Block Grant Capital Funds:

- CA16-P019-501-05
- CA16-P019-501-06
- CA16-P019-501-07
- CA16-P019-501-09
- CA0190013009R

Annual Statement / Performance and Evaluation Report  
 Capital Fund Program and 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

**Part I: Summary**

PHA Name: <b>Housing Authority of the County of San Bernardino</b>		Grant Type and Number Capital Fund Program Grant/Replacement Housing Factor Grant No.: <b>CA16-P019-501-05</b>		FFY of Grant <b>2005</b>	
Date of CFFP:		Revised Annual Statement (revision no. <b>1</b> )		FFY of Grant Approval	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending		<input type="checkbox"/> Revised Annual Statement (revision no. <b>1</b> ) <input type="checkbox"/> Final Performance and Evaluation Report			
Line	Summary by Development Account	Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	911,541.00	911,541.00	911,541.00	911,541.00
3	1408 Management Improvements	911,541.00	911,541.00	911,541.00	911,541.00
4	1410 Administration	465,770.00	465,770.00	465,770.00	465,770.00
5	1411 Audit	10,000.00	10,000.00	10,000.00	10,000.00
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	488,287.00	488,287.00	488,287.00	488,287.00
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	1,213,152.00	1,213,152.00	1,213,152.00	1,213,152.00
10	1460 Dwelling Structures	567,416.00	567,416.00	567,416.00	567,416.00
11	1465 1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1492 Moving to Work Demonstration	-	-	-	-
16	1495 1 Relocation Costs	-	-	-	-
17	1499 Development Activities	-	-	-	-
18a	1501 Collateralization or Debt Service paid by the PHA	-	-	-	-
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	-	-	-	-
19	1502 Contingency	-	-	-	-
20	Amount of Annual Grant (Sum of lines 2-19)	\$ 4,557,707.00	\$ 4,557,707.00	\$ 4,557,707.00	\$ 4,557,707.00
21	Amount of line 20 Related to LBP Activities	-	-	-	-
22	Amount of line 20 Related to Section 504 Compliance	-	-	-	-
23	Amount of line 20 Related to Security - Soft Costs	2,777,139.00	2,777,139.00	2,777,139.00	2,777,139.00
24	Amount of line 20 Related to Security - Hard Costs	1,780,568.00	1,780,568.00	1,780,568.00	1,780,568.00
25	Amount of line 20 Related to Energy Conservation Measure	-	-	-	-
Signature of Executive Director		Signature of Public Housing Director		Date	

Part II: Supporting Pages

FHA Name		Grant Type and Number		Fiscal Year of Grant				
Housing Authority of the County of San Bernardino		Capital Fund Program Grant No. CA16-P019-001-05		2005				
Developer Name	Special Description of Major Work Category	Development Account No.	Quantity	CFE (Market)		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Expended	
Phaywade	Operations	1405.00		911,541.00	911,541.00	911,541.00	911,541.00	
	Management Improvements	1405.00			435,653.78	435,653.78	435,653.78	
	Family Self Sufficiency	1405.00		108,000.00	289.41	289.41	289.41	
	Fast Housing	1405.00		22,500.00	119,589.01	119,589.01	119,589.01	
	Homeownership	1405.00		75,000.00				
	Staff Development	1405.00		67,500.00				
	Resident Programs	1405.00		67,500.00	119,917.56	119,917.56	119,917.56	
	Security	1405.00		78,144.00				
	Resident Computer Training	1405.00		48,000.00				
	Computer Software	1405.00		446,893.00	376,239.26	376,239.26	376,239.26	
	Administration	1410.00		455,710.00	455,710.00	455,710.00	455,710.00	
	Audit	1411.00		10,000.00	10,000.00	10,000.00	10,000.00	
	Feas & Costs							
	A/E - Planning	1420.00		20,000.00				
	A/E Resident Participation	1420.00		76,000.00	166,473.53	166,473.53	166,473.53	
	A/E 19910 Resident	1420.00		393,287.09	322,813.17	322,813.17	322,813.17	
	Site Improvements 1420	1420.00			34,554.00	34,554.00	34,554.00	
AC Permit - Accessible	1420.00		117,975.00	117,975.00	117,975.00	117,975.00		
Concrete	1420.00		99,500.00	252,760.00	252,760.00	252,760.00		
Fencing - accessible	1420.00		228,608.00	228,608.00	228,608.00	228,608.00		
Landscaping/Planting - accessible	1420.00		341,000.00	252,550.00	252,550.00	252,550.00		
Rooftop - accessible	1420.00		426,000.00	316,106.00	316,106.00	316,106.00		
Existing Structures 1420								
Light In-Pace Maintenance - accessible	1420.00		75,000.00	-	-	-	-	
Shower/Tub/Toilet wall repair - accessible	1420.00		542,416.00	667,416.00	667,416.00	667,416.00	667,416.00	
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U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
Expires 4/30/2011

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Federal FY of Grant:

[illegible]

Annual Statement / Performance and Evaluation Report  
 Capital Fund Program and 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

**Part I: Summary**

PHA Name: <b>Housing Authority of the County of San Bernardino</b>		Grant Type and Number Capital Fund Program Grant/Replacement Housing Factor Grant No. <b>CA16-F018-501-05</b>		FFY of Grant <b>2006</b>	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending		<input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no. <b>1</b> ) <input type="checkbox"/> Final Performance and Evaluation Report		FFY of Grant Approval	
Date of CFFP:					
Line	Summary by Development Account	Original	Total Estimated Cost Revised	Obligated	Total Actual Cost Expended
1	Total Non-OGP Funds				
2	1406 Operations	802,870.00	802,870.00	802,870.00	802,870.00
3	1408 Management Improvements	802,870.00	802,870.00	802,870.00	802,870.00
4	1410 Administration	401,435.00	401,435.00	401,435.00	401,435.00
5	1411 Audit	10,000.00	10,000.00	10,000.00	10,000.00
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	300,000.00	300,000.00	300,000.00	300,000.00
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	250,000.00	250,000.00	250,000.00	250,000.00
10	1460 Dwelling Structures	1,131,719.00	1,131,719.00	1,131,719.00	1,131,719.00
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1492 Moving to Work Demonstration	-	-	-	-
16	1495.1 Relocation Costs	315,460.00	315,460.00	315,460.00	315,460.00
17	1499 Development Activities	-	-	-	-
18a	1501 Collateralization or Debt Service paid by the PHA	-	-	-	-
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	-	-	-	-
19	1502 Contingency	-	-	-	-
20	Amount of Annual Grant (Sum of lines 2-19)	\$ 4,014,354.00	\$ 4,014,354.00	\$ 4,014,354.00	\$ 4,014,354.00
21	Amount of line 20 Related to LBP Activities	-	-	-	-
22	Amount of line 20 Related to Section 504 Compliance	-	-	-	-
23	Amount of line 20 Related to Security - Soft Costs	2,317,175.00	2,317,175.00	2,317,175.00	2,317,175.00
24	Amount of line 20 Related to Security - Hard Costs	1,697,179.00	1,697,179.00	1,697,179.00	1,697,179.00
25	Amount of line 20 Related to Energy Conservation Measure	-	-	-	-
Signature of Executive Director		Date	Signature of Public Housing Director		Date

**Part II: Supporting Pages**

PHA Name:		Grant Type and Number		Federal FY of Grant:	
Housing Authority of the County of San Bernardino		Capital Fund Program Grant No: CA16-P019-501-06		2006	
Development Name/HA-Wide		Development Account No.	Replacement Housing Factor Grant Nk	CEFP (Yes/No):	
Activities		Quantity		Total Estimated Cost	
PHA-Wide		Original		Revised	
Operations		1406.00		802,870.00	
Management Improvements		1408.00		147,393.30	
Homeownership		1408.00		5,672.77	
Staff Development		1408.00		100,626.17	
Crime Prevention/Reduction		1408.00		549,177.76	
Resident Services		1410.00		401,435.00	
Administration		1411.00		10,000.00	
Audit		1430.00		75,000.00	
Fees & Costs		1430.00		50,000.00	
A&E - 19.003 LBP Management		1430.00		205,993.23	
Misc. Fees & Costs		1430.00		94,006.77	
A&E Redlands Redevelopment		1450.00		250,000.00	
Site Improvements 1450		1450.00		250,000.00	
Cotton Redevelopment		1460.00		1,131,719.00	
Dwelling Structures 1460		1460.00		1,131,719.00	
Cotton Redevelopment		1460.00		1,131,719.00	
Refinish wood wall surfaces		1460.00		1,000,000.00	
LBP in-place management - agencywide		1495.10		315,460.00	
Relocation 1495		1495.10		315,460.00	
Cotton Seniors		1495.10		315,460.00	

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
Expires 4/30/2011

## Federal FY of Grant:

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Annual Statement / Performance and Evaluation Report  
 Capital Fund Program and 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

**Part I: Summary**

PHA Name: <b>Housing Authority of the County of San Bernardino</b>		Grant Type and Number Capital Fund Program Grant/Replacement Housing Factor Grant No: <b>CA16-P019-501-07</b>		FFY of Grant <b>2007</b>	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending		<input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no. <b>1</b> ) <input type="checkbox"/> Final Performance and Evaluation Report		FFY of Grant Approval	
Line	Summary by Development Account	Original	Revised	Obligated	Expended
1	Total Non-OGP Funds				
2	1406 Operations	844,358.00	844,358.00	844,358.00	844,358.00
3	1408 Management Improvements	844,358.00	844,358.00	844,358.00	844,358.00
4	1410 Administration	422,179.00	422,179.00	422,179.00	302,573.52
5	1411 Audit	10,000.00	10,000.00	10,000.00	1,200.00
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	475,000.00	475,000.00	475,000.00	475,000.00
8	1440 Site Acquisition	-	-	-	-
9	1460 Site Improvement	425,896.00	425,896.00	425,896.00	312,840.02
10	1460 Dwelling Structures	1,200,000.00	1,200,000.00	1,200,000.00	512,638.19
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1482 Moving to Work Demonstration	-	-	-	-
16	1485.1 Relocation Costs	-	-	-	-
17	1489 Development Activities	-	-	-	-
18a	1501 Collateralization or Debt Service paid by the PHA	-	-	-	-
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	-	-	-	-
19	1502 Contingency	-	-	-	-
20	Amount of Annual Grant (Sum of lines 2-19)	\$ 4,221,791.00	\$ 4,221,791.00	\$ 4,221,791.00	\$ 3,292,967.73
21	Amount of line 20 Related to LBP Activities	-	-	-	-
22	Amount of line 20 Related to Section 504 Compliance	-	-	-	-
23	Amount of line 20 Related to Security - Soft Costs	2,595,895.00	2,595,895.00	2,595,895.00	2,595,895.00
24	Amount of line 20 Related to Security - Hard Costs	1,625,896.00	1,625,896.00	1,625,896.00	1,625,896.00
25	Amount of line 20 Related to Energy Conservation Measure	-	-	-	-
Signature of Executive Director		Signature of Public Housing Director		Date	

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
**Expires 4/30/2011**

## Federal FY of Grant:

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
Expires 4/30/2011

## Federal FY of Grant:

[illegible]



Annual Statement / Performance and Evaluation Report  
 Capital Fund Program and 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

**Part I: Summary**

PIA Name:		Grant Type and Number		FFY of Grant	
Housing Authority of the County of San Bernardino		Capital Fund Program Grant/Replacement Housing Factor Grant No. CA165019501-09		2009	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending		<input type="checkbox"/> Revised Annual Statement (revision no. 1) <input type="checkbox"/> Final Performance and Evaluation Report		FFY of Grant Approval	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending		<input type="checkbox"/> Revised Annual Statement (revision no. 1) <input type="checkbox"/> Final Performance and Evaluation Report		FFY of Grant Approval	
Line	Summary by Development Account	Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	40,000.00	-	40,000.00	31,490.00
4	1410 Administration	400,000.00	-	400,000.00	301,198.75
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	357,689.00	-	357,689.00	357,689.00
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	4,176,000.00	-	4,176,000.00	3,395,245.14
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	105,000.00	-	105,000.00	37,695.02
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1492 Moving to Work Demonstration	-	-	-	-
16	1495.1 Relocation Costs	-	-	-	-
17	1499 Development Activities	-	-	-	-
18a	1501 Collateralization or Debt Service paid by the PIA	-	-	-	-
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	-	-	-	-
19	1502 Contingency	-	-	-	-
20	Amount of Annual Grant (Sum of lines 2-19)	\$ 5,078,689.00	\$ -	\$ 5,078,689.00	\$ 4,123,517.91
21	Amount of line 20 Related to LBP Activities	-	-	-	-
22	Amount of line 20 Related to Section 504 Compliance	-	-	-	-
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 Measure	-	-	-	-
Signature of Executive Director		Signature of Public Housing Director		Date	

## PHA Name:

[illegible]

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
Expires 4/30/2011

**Federal FY of Grant:**[illegible]

Annual Statement / Performance and Evaluation Report  
 Capital Fund Program and 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  
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**Part I: Summary**

PHA Name:		Grant Type and Number		FFY of Grant	
Housing Authority of the County of San Bernardino		Capital Fund Program Grant/Replacement Housing Factor Grant No. CA0190013009R		2009	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending		<input type="checkbox"/> Revised Annual Statement (revision no. 1) <input type="checkbox"/> Final Performance and Evaluation Report		FFY of Grant Approval	
<input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Summary by Development Account		Date of CFFP:			

Line	Summary by Development Account	Original	Revised	Obligated	Expended
1	Total Non-OGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	335,600.00	-	335,600.00	251,067.36
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	246,846.00	-	246,846.00	218,193.80
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	2,416,554.00	-	2,416,554.00	1,974,600.00
11	1465 1 Dwelling Equipment - Nonexpendable	357,000.00	-	357,000.00	317,880.00
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1482 Moving to Work Demonstration	-	-	-	-
16	1485 1 Relocation Costs	-	-	-	-
17	1499 Development Activities	-	-	-	-
18a	1501 Collateralization or Debt Service paid by the PHA	-	-	-	-
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	-	-	-	-
19	1502 Contingency	-	-	-	-
20	Amount of Annual Grant (Sum of lines 2-19)	\$ 3,356,000.00	\$ -	\$ 3,356,000.00	\$ 2,761,741.16
21	Amount of line 20 Related to LBP Activities	-	-	-	-
22	Amount of line 20 Related to Section 504 Compliance	-	-	-	-
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 Measure	-	-	-	-
Signature of Executive Director		Date		Signature of Public Housing Director	
				Date	

## Part II: Supporting Pages

[illegible]

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
**Expires 4/30/2011**

## Federal FY of Grant:

[illegible]

## **APPENDIX C: MTW FACT SHEETS**

As an MTW agency we realize that comprehensive and accurate communication is critical to the success of our MTW participation. We have attached some samples of our MTW fact sheets to inform our partners – residents, landlords and the community of our new policies and program. The fact sheets are also posted online and available at our offices.



# HACSBFACTSHEET

## Moving to Work | OVERVIEW

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

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

### WHAT IS MOVING TO WORK?

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

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

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

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

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

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

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



### WHAT'S NEXT?

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



### OUR MISSION

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

### OUR CORE VALUES

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

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

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

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

# HACSB **FACTSHEET**

## **Moving to Work | OVERVIEW**

### **HCV PARTICIPANTS**

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

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

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

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

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



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

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

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

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



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

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

#### **MINIMUM RENT:**

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



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

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

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

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

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

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



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



# HACSB **FACTSHEET**

## **Moving to Work | OVERVIEW**

### **HCV LANDLORDS**

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

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

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

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



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

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

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

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



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

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

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

- **New policy:** All individuals moving into and out of HACSB’s jurisdiction (the County of San Bernardino) will have to comply with the MTW policies and requirements. Applicants must lease up in HACSB’s jurisdiction for at least two years before a request to move will be considered.

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



#### **MINIMUM RENT:**

- **New policy:** HACSB has adopted a new minimum rent amount of \$125.00. Pursuant to HUD regulations, if 30 percent of the monthly adjusted household income is less than the established minimum rent, the total tenant payment toward rent and utilities will be increased to \$125.00. A temporary waiver policy has been established for families who demonstrate a hardship in paying the increased required minimum amount. In order to qualify for a temporary waiver, the family’s income must have decreased due to a no fault loss of employment or the death of a household member.

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

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

\*Pending HUD approval by September 30, 2009

*As an MTW demonstration site, HACSB is able to implement new policies outside the usual scope of HUD policies and regulations.*

# HACSB **FACTSHEET**

## Program Moves | Overview

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

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

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

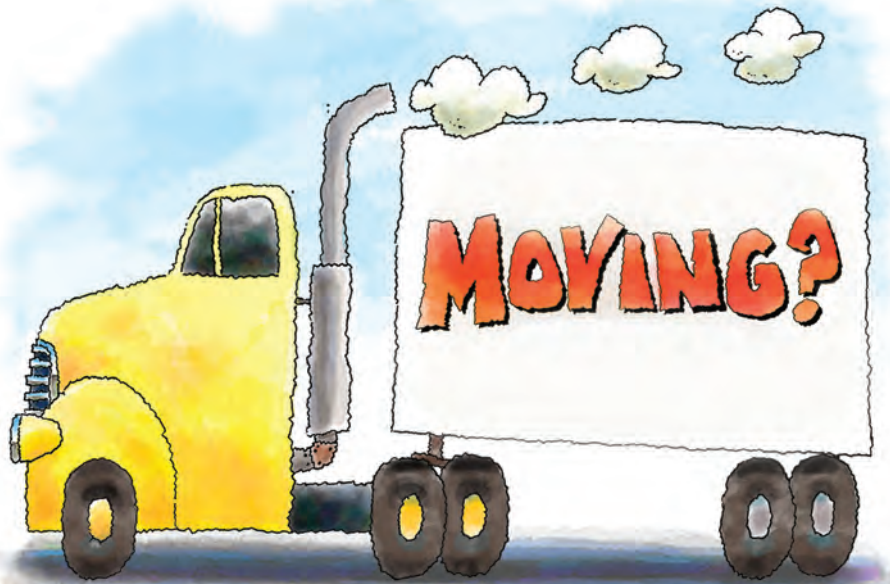
on the HCV program. Each family will be required to sign a new Voucher. After the family leases up at a new unit, they will be required to stay at that unit at least two years.

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

### **ELECTIVE MOVES:**

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

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





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

### **PERMISSIBLE MOVES:**

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

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

### **MANDATORY MOVES:**

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

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

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

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

### **TIMING OF MOVES:**

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

### **INCOMING PORTABILITY:**

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





# HACSB **FACTSHEET**

## **Moving to Work | OVERVIEW**

### **PUBLIC HOUSING RESIDENTS**

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

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

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

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

#### **MINIMUM RENT:**

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

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

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

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

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

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

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



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#### **OUR CORE VALUES**

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# HACSBFACTSHEET

## Energy Conservation Measures

### OVERALL

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

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

### COST SAVINGS

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

### SPECIFIC PROJECTS

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

### VALUE ADDED

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



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# HACSB **FACTSHEET**

## Pilot Work Requirement Overview

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

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

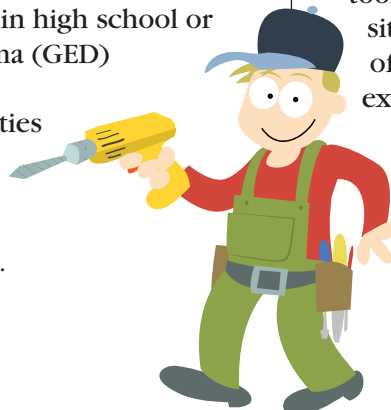
To help promote self-sufficiency among assisted families, HACSB will be implementing a pilot work requirement at the Medical Center housing community. Households will have a 6-month grace period to comply while they search for activities to fulfill this requirement.



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

in a General Equivalency Diploma (GED) preparatory course.

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



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

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

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

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

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



# HACSB **FACTSHEET**

## Redlands Public Housing Revitalization Project

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

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

### **INCREASING THE HOUSING STOCK:**

#### **Current numbers:**

- 115 Public Housing Units—for families with less

than 80% Area Median Income (AMI).

- Approximately 430 residents.

#### **Post-Revitalization Numbers:**

228 total units:

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

#### **GREEN BUILDING\*:**

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

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



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

### BENEFITS OF THE REVITALIZATION PROJECT:

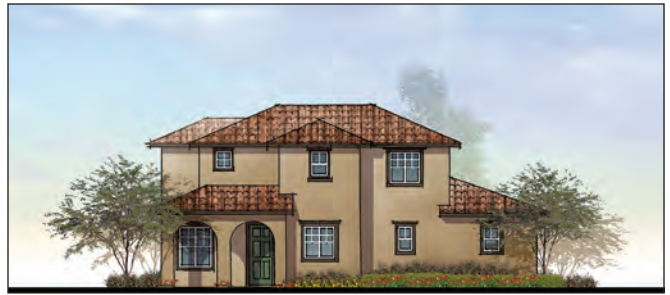
- Includes a new club house to provide self-sufficiency activities for the entire community;
- Promotes early childhood development through an on-site Head Start Preschool;
- Incorporates green features and technology;
- Maximizes 18.8 acres of land available to expand the number of housing units available;



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

### PROJECT'S GUIDING PRINCIPLES:

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



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

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





# HACSBFACTSHEET

## Moving to Work | Portability

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

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

How does this affect individuals who want to port-in to San Bernardino County? Portability is defined as renting a dwelling unit with the Section 8 tenant-based assistance outside the jurisdiction of the initial public housing agency. All individuals moving into and out of the County of San Bernardino will have to comply with HACSB's local policies and requirements. Below are specific policy changes that apply directly to all port-ins:

### LOCAL POLICIES FOR PORTABILITY

#### Work Requirement

All eligible adult household members of the incoming portability family must be employed at least 15 hours per week in the County of San Bernardino (or within a reasonable driving distance) prior to the execution of a Housing Assistance Payment Contract and throughout their participation in the HACSB's voucher program. Eligible members include all adult household members over the age of 18. Elderly and disabled individuals and one adult in a household with children under the age of 6 will be exempt from this policy.

The employment will be verified at time of admission and all eligible members must

be compliant at the time of admission. All children under the age of 18 who have not graduated from high school or received their GED must be enrolled in school full time. Incoming portability families who are not in compliance with the work requirement will be given the option to port back to their initial housing authority or lose their assistance with HACSB.

#### Minimum Rent

HACSB's minimum rent is \$125.00 per month for all households.

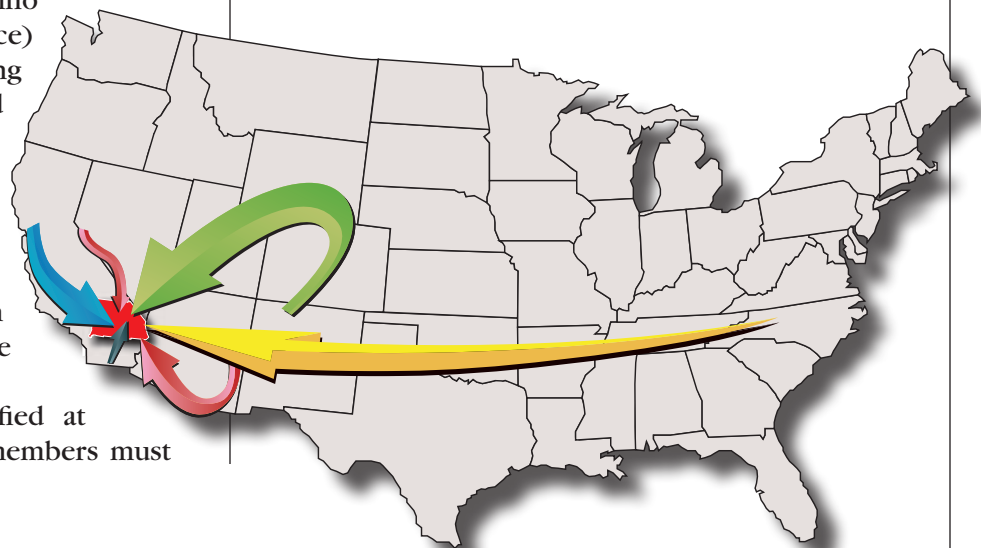
#### Controlled Program Moves

HACSB will limit voluntary program moves for all voucher participants to once every two years, only at the time of recertification and upon verification from their current landlord that they are a tenant in good standing. There are certain exceptions: a unit is in foreclosure, or a participant has a job or attends school more than 10 miles from their current unit.

#### Biennial Recertification

All fixed income elderly and disabled households will be recertified every two years.

Please visit our website at [www.hacsb.com](http://www.hacsb.com) for more information.



# HACSB **FACTSHEET**

## **Moving to Work**

## **BI-ANNUAL RECERTIFICATION**

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

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

### **WHAT ARE BI-ANNUAL RECERTIFICATIONS?**

Effective January 2010, Bi-Annual Recertifications will be conducted every two years for single fixed-income elderly and disabled households for both the Public Housing and Housing Choice Voucher (HCV) Programs.

### **WHAT IS THE PREVIOUS POLICY ON BI-ANNUAL RECERTIFICATIONS?**

HCV Program participants and Public Housing residents would be re-certified once every twelve months to determine continued eligibility and determine the amount of rent to be paid by the assisted family.

### **HOW DOES THIS AFFECT ME AS A...**

- **Landlord:** With this new policy in place, you *may*



receive a notice of change every two years after the bi-annual recertification.

- **Participant and resident:** This new policy will reduce the reporting burdens for elderly and disabled households. Affected families who wish to have their income adjusted between recertifications may request to do so through a special re-examination. There must be a \$300 variance in income in order to complete a re-examination. Changes in family composition must still be reported pursuant to the Housing Authority's operating procedures.



### **OUR MISSION**

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

### **OUR CORE VALUES**

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

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

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

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