

# Moving to Work **ANNUAL REPORT**

Housing Authority of the County of San Bernardino

# 2015



*Building Communities  
Changing Lives*

Submitted to HUD December 28, 2015

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HOUSING AUTHORITY OF THE  
COUNTY OF SAN BERNARDINO

### Our Mission

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

### Our Vision

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

### Our Core Values

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

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

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

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

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## For More Information

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# Section I: Introduction

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For over 70 years, the Housing Authority of the County of San Bernardino (HACSB) has been one of the leading providers of affordable housing in the County of San Bernardino. The County of San Bernardino is the largest county in the contiguous United States consisting of 24 cities: covering over 20,000<sup>1</sup> square miles of land. It is the twelfth largest county in the nation<sup>2</sup>, with more residents than 15 of the country's states. The population of San Bernardino County has grown by more than three percent<sup>3</sup> between 2010 and 2014 and is expected to continue to rise over the next two decades. HACSB proudly serves more than 30,000 people, most of whom are seniors, disabled individuals, and children.

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

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

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

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

## What is “Moving to Work”?

Moving to Work (MTW) is a U.S. Department of Housing and Urban Development (HUD) demonstration for housing authorities to design and test innovative, locally designed housing and self-sufficiency initiatives. The MTW designation allows participating agencies to waive certain statutes and U.S. Department of Housing and Urban Development regulations in order to increase housing choice for low-income families, encourage

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<sup>1</sup> San Bernardino County 2015 Community Indicators Report

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

<sup>3</sup> Census Quick Facts 2015

households to increase their self-sufficiency, and improve administrative and operational cost effectiveness. HACSB's participation in MTW allows the agency to test new methods to improve housing services and to better meet local needs.

As a high performing, innovative and progressive agency, HACSB was designated as a Moving to Work (MTW) Agency by HUD in 2008. HACSB has completed seven years of MTW participation, during which we have developed 25 MTW initiatives.

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

MTW Plan	Approved by HUD	MTW Report	Accepted/received by HUD
FY 2009 MTW Annual Plan  Amendment 1	September 25, 2008  June 29, 2009		
FY 2010 MTW Annual Plan  Amendment 1  Amendment 2  Amendment 3	September 30, 2009  November 18, 2009  February 22, 2010  September 15, 2010	FY 2009 MTW Annual Report	April 22, 2010
FY 2011 MTW Annual Plan	October 18, 2010	FY 2010 MTW Annual Report	March 21, 2011
FY 2012 MTW Annual Plan  Amendment 1	October 5, 2011  November 4, 2011	FY 2011 MTW Annual Report	March 20, 2012
FY 2013 MTW Annual Plan	September 27, 2012	FY 2012 MTW Annual Report	July 19, 2013
FY 2014 MTW Annual Plan	May 14, 2014	FY 2013 MTW Annual Report	December 31, 2013
FY 2015 MTW Annual Plan  Amendment 1A  Amendment 1B  Amendment 2	February 13, 2015  May 11, 2015  Pending HUD review/approval  Pending HUD review/approval	FY 2014 MTW Annual Report	December 31, 2014
FY 2016 MTW Annual Plan	November 4, 2015	FY 2015 MTW Annual Report (this report)	Submitted to HUD December 22, 2015

## Overview of Agency’s Goals and Objectives

### Accomplishments

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

-  Activity 22 – Streamlined Lease Assistance Program – implemented February 1, 2015
-  Activity 23 – No Child Left Unsheltered – Implemented April 1, 2015
-  Activity 24 – Transition for Over-Income Families – Implemented April 1, 2015

### Long-Term Goals

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

Our strategic 30 year goals are -

HACSB 30 Year Strategic Goals	
<b>Strategic Goal 1:</b>	No eligible family waits longer than 10 days for housing
<b>Strategic Goal 2:</b>	Clients have achieved their own personal level of stability and economic independence
<b>Strategic Goal 3:</b>	For those whom a transition is appropriate, the maximum stay in assisted living is 5 years
<b>Strategic Goal 4:</b>	HACSB leaders and supporters are innovative policy makers and influencers of legislation
<b>Strategic Goal 5:</b>	HACSB has secured the resources needed for accomplishing its mission
<b>Strategic Goal 6:</b>	HACSB is a leading developer and provider of affordable housing in the County of San Bernardino
<b>Strategic Goal 7:</b>	HACSB is adequately staffed with well trained and fully developed employees
<b>Strategic Goal 8:</b>	HACSB communication is open, honest and consistent
<b>Strategic Goal 9:</b>	HACSB employees have a high level of morale
<b>Strategic Goal 10:</b>	HACSB clients, programs and properties are embraced by all communities
<b>Strategic Goal 11:</b>	HACSB clients live in safe and desirable homes and communities where they can develop and prosper

Our MTW designation assists in our efforts to achieve our long term goals and the statutory objectives align with our long term vision. HACSB currently has 25 approved MTW activities with no activities pending HUD approval: twelve address the objective of operational efficiency, nine assist families with their economic independence efforts and four help expand housing opportunities. As good stewards of taxpayers' dollars, we ensure optimal use of funds to provide the best quality services to our families; and HACSB continually seeks to implement innovative solutions that streamline processes, increase efficiency and help families achieve economic independence. Proactive planning has helped us face the consecutive budget reductions while increasing the number of families served and services provided.

## Short Term Goals

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

- **Goal 1 - Operational efficiency through innovation** – Maximizing HACSB's economic viability and sustainability through the following strategies:

-  Ensure excellent and efficient stewardship of resources and programs
-  Maintain a workplace environment that attracts and retains capable employees who feel they are making a difference
-  Have an increasingly diverse number of funding sources to provide the programs and services described in the strategic plan
-  Develop a communication program that effectively disseminates information inside and outside the Agency
-  Provide world class customer service

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

- **Goal 2 – Develop economically independent clients** – Facilitating opportunities for families and individuals to become self-sufficient and financially independent to transition from dependency on housing subsidy through the following strategies:

-  Develop and maintain policies programs, and services that foster accountability, responsibility and economic independence
-  Transform client mindset from entitlement to empowerment
-  Partner with external organizations to support clients in acquiring life skills, education and training
-  Assist families in strengthening personal accountability and in transitioning to Home Ownership/Market rentals

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

- **Goal 3 – Ensure freedom of housing choice** – Providing quality affordable housing opportunities in mixed-income communities with access to excellent quality of life through the following strategies:

-  Improve and expand HACSB’s real estate assets
-  Partner with external organizations to leverage funding and development opportunities
-  Develop innovative programs to expand housing opportunities for under-served populations such as homeless Veterans and homeless families with children

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

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

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR	STATUS
Activity 1	Single Fund Budget	Cost Effectiveness	FY 2009	Implemented
Activity 2	Strategic Investment Policies	Cost Effectiveness	FY 2009	Implemented
Activity 3	Alternate Assessment Program	Cost Effectiveness	FY 2009	On Hold
Activity 4	Biennial Recertifications	Cost Effectiveness	FY 2009	Implemented
Activity 5	Local Verification Policies	Cost Effectiveness	FY 2009	Implemented
Activity 6	Elimination of Assets	Cost Effectiveness	FY 2009	Implemented
Activity 7	Controlled Program Moves	Cost Effectiveness	FY 2009	Implemented
Activity 8	Local Policies for Portability	Self-Sufficiency	FY 2009	Implemented
Activity 9	Elimination of Earned Income Disallowance	Self-Sufficiency	FY 2009	Implemented
Activity 10	Minimum Rent	Self-Sufficiency	FY 2009	Implemented
Activity 11	Local Project-Based Voucher Program	Housing Choice	FY 2009	Implemented
Activity 12	Local Payment Standards	Housing Choice	FY 2009	Implemented
Activity 13	Local Inspection Standards	Cost Effectiveness	FY 2010	Implemented
Activity 14	Local Asset Management Program	Cost Effectiveness	FY 2010	Implemented
Activity 15	Pilot Work Requirement	Self-Sufficiency	FY 2010	Implemented
Activity 16	Operating Subsidy for Vista del Sol	Housing Choice	FY 2010	Closed Out
Activity 17	Local Income Inclusion	Self-Sufficiency	FY 2011	Implemented
Activity 18	Property Management Innovation	Cost Effectiveness	FY 2011	Implemented
Activity 19	Local FSS program	Self-Sufficiency	FY 2011	Implemented
Activity 20	Five Year Lease Assistance Program	Self-Sufficiency	FY 2011	Implemented
Activity 21	Utility Allowance Reform	Cost Effectiveness	FY 2012	Closed Out
Activity 22	Streamlined Lease Assistance Program	Cost Effectiveness	FY 2013	Implemented

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR	STATUS
Activity 23	No Child Left Unsheltered	Self-Sufficiency	FY 2014	Implemented
Activity 24	Transition for Over-Income Families	Self-Sufficiency	FY 2014	Implemented
Activity 25	PBV Flexibility for Horizons at Yucaipa	Housing Choice	FY 2015	Not Yet Implemented

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

- Goal 1 - Operational efficiency through innovation** – Maximizing HACSB’s economic viability and sustainability:

  -  Utilized technology to launch online Wait List portal used for the opening of the Tenant Based Rental Assistance program wait list February 19, 2015 through March 9, 2015. The fully online system allowed applicants to apply any time of day from any device, eliminating wait times at physical offices to apply. A call center was established to assist clients with reasonable accommodation requests and limited English proficiency in applying. HACSB received over 25,000 unique applications throughout the enrollment period.
- Goal 2 – Develop economically independent clients** – Facilitating opportunities for families and individuals to become self-sufficient and financially independent to transition from dependency on housing subsidy:

  -  Expanded onsite employment support for clients with the addition of two Career Readiness Coordinators to work with Five Year Lease Assistance families, one full-time Jobs Plus Coach and two Workforce Development Specialists on-site for three days per week for Maplewood Homes, a CalWorks Youth Employment Program referral system in partnership with the County of San Bernardino, and holding employment resource and opportunity events for clients to be connected to employers and resources.
  -  Pursued alternative funding to support and expand resident services such as submitting a \$3 million Jobs Plus grant application.
- Goal 3 – Ensure freedom of housing choice** – Providing quality affordable housing opportunities in mixed-income communities with access to excellent quality of life:

  -  Continued construction at the Redlands/Lugonia Public Housing site. The modular construction of 85 new units is complete and the property is in the leasing process with an expected fill date of January 1, 2016.
  -  Phase I of the Waterman neighborhood revitalization closed on tax credit financing and a Groundbreaking was held on June 15, 2015.
  -  A majority of the Public Housing portfolio has been approved for the Rental Assistance Demonstration Program with expected conversion dates by March 1, 2016. The program will convert the public housing subsidies into a long-term, Project-Based Section 8 rental assistance subsidy, which will provide stable and predictable revenues allowing HACSB to apply for Low-Income Housing Tax Credits and other sources of financing to fund public housing renovations.
  -  Continued to support expansion of affordable housing through partnerships with developers. HACSB is currently involved with projects in Bloomington, Loma Linda, Chino, and Yucaipa with a Groundbreaking for the Yucaipa property on November 13, 2015. The HACSB affiliate non-profit, KEYS, has been re-structured to focus on supporting housing of special populations with a current focus on homeless Veterans

and their families. KEYS has been heavily involved in a county-wide effort to house approximately 400 homeless Veterans within the calendar year and has been instrumental in housing about 200 of those homeless Veterans.

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

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

## Section II: General Operating Information

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

### **MISSION STATEMENT**

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

### **AGENCY OVERVIEW**

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

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

Details on the total number of PBV units at the end of FY 2015 are shown below. Of the 1,025 total units, 651 are HACSB owned and 371 are owned by HACSB's affiliate non-profit, Housing Partners I, Inc.

*New Housing Choice Vouchers that were Project-Based during the Fiscal Year*

New Housing Choice Vouchers that were Project-Based During the Fiscal Year			
Property Name	Anticipated Number of New Vouchers to be Project-Based *	Actual Number of New Vouchers that were Project-Based	Description of Project
Bloomington Family Community	11	0	Family Community, New Development
Meadowbrook Park, San Bernardino	47	47	Senior Community, Rehabilitated Development
Horizons, Yucaipa	50	0	Senior Community, New Development
Valencia Grove, Redlands	85	0	PBV as replacement for PH disposition for mixed family and senior units
Re-Entry Housing, San Bernardino	8	0	Family Community, New Development
No Child Left Unsheltered	0	40	Scattered Sites

Anticipated Total Number of New Vouchers to be Project-Based *	Actual Total Number of New Vouchers that were Project-Based	Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year *	Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year *
201	87	1170	1170
		Actual Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year	Actual Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year
		1,115	720

\* From the Plan

<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
Sunset Pointe	Barstow	117
Sunrise Vista	Barstow	108
Mentone Clusters	Mentone	34
Scattered Sites	Various	308
Andalusia	Victorville	42
Arrowhead Commons	San Bernardino	17
Meadowbrook	San Bernardino	47
No Child Left Unsheltered – Scattered Sites	Various	26
No Child Left Unsheltered – Scattered Sites	Various	10
No Child Left Unsheltered – Scattered Sites	Various	4
<b>TOTAL PROJECT BASED UNITS</b>		<b>1,115</b>

*Other Changes to the Housing Stock that Occurred during the Fiscal Year*

Other Changes to the Housing Stock that Occurred During the Fiscal Year		
The Public Housing portfolio started off the year with 1,216 units. Throughout the year, decreases were made to the portfolio as follows:		
CHANGES TO PUBLIC HOUSING TOTAL UNITS IN FY 2014		
AMP	Description	# Units
AMP 120	44 units converted under RAD at Waterman Gardens	-44
AMP 130	No change	0
AMP 150	4 units Homeownership sales, 1 unit PH revitalization disposition (Lugonia & Delaware, Redlands)	-5
AMP 160	Homeownership sales	-2
AMP 170	Homeownership sale	-2
AMP 180	No change	0
AMP 190	No change	0
<b>TOTAL</b>		<b>-53</b>

No additions were made to the public housing inventory. Therefore, as of September 30, 2015, there were 1,163 public housing units. This does not include 8 offline units (ACC Non Dwelling) that had previously been permanently converted to non-dwelling units for resident service purposes such as head-start centers, child care, and education centers or 25 non ACC units used for administrative purposes and resident amenities (community rooms, laundry rooms, etc.).

Below is a detailed chart of our homeownership sales and their locations. In FY 2015 our efforts led to the sale of 8 homes.

PUBLIC HOUSING UNITS SOLD IN FY 2015		
Address	City	AMP
2153 Pepper Drive	Highland	150
10260 Stafford St.	Rancho Cucamonga	160
2149 Pepper Drive	Highland	150
1133 Broadway Ave.	Barstow	170
12529 Nasturtium	Rancho Cucamonga	160
6974 Rogers Lane	Highland	150
1120 Broadway Court	Barstow	170
1255 Devon Place	Redlands	150

Demo/Dispo – Work continued throughout FY 2015 on the first phase of construction for the Valencia Grove Housing Community in Redlands, CA. The disposition application for 32 buildings containing 113 dwelling units and 3 non-dwelling units for Management Point AMP 150, commonly referred to as the Redlands Lugonia Avenue Public Housing site (Sites 019-001, 008 & 009), was approved by HUD in March of 2012. The demolition is being completed in two phases – 60 units in the first phase and 55 units in the second phase. The initial construction phase of 85 rental units was completed in FY 2015. The new units are now in the leasing process with an expected fill date of December 2015.

RAD Conversion - Phase I of the Waterman neighborhood revitalization closed on tax credit financing and a Groundbreaking was held on June 15, 2015. 44 units were converted to RAD during FY 2015, with the remainder of HACSB's Public Housing portfolio scheduled for conversion in FY 2016.

*General Description of Actual Capital Fund Expenditures during the Plan Year*

**General Description of Actual Capital Fund Expenditures During the Plan Year**

The most significant expenditures of Capital Funds in 2015 were directly related to the ongoing pre-development and development work associated with the initial construction phases of the Waterman Gardens redevelopment project in San Bernardino. Construction is scheduled for completion in late 2016. HACSB also successfully applied under the Rental Assistance Demonstration (RAD) program to convert existing public housing operating and capital subsidies for that site to project based rental assistance. The initial phase of that project entails relocating 75 units to an adjacent vacant site, wherein a new apartment complex will be built utilizing 9% low-income housing tax credits and FHA debt serviced by the new RAD voucher funding stream. The tax credit allocation for that project was awarded in October 2014. Capital Fund was utilized to cover Architecture/Engineering, legal, consulting and resident relocation costs associated with the revitalization.

Capital Fund continues to be utilized for the implementation of Section 3 employment training programs which are directly integrated with the public housing revitalization projects underway in the City of Redlands and in San Bernardino. The “ReUse Warehouse”, which opened in September 2014, continued to market for sale to the public construction materials salvaged from our housing demolition projects in order to provide a source for low cost building materials to stimulate and support neighborhood revitalization. The warehouse is staffed by section 3 resident graduates of our deconstruction training program.

Work continued authority-wide under Capital Fund to improve dwellings on an as-needed basis for ADA/Section 504 accessibility, energy conservation and weatherization. Continued federal budget cuts have reduced the fund substantially, leading to our pursuit of RAD conversion for the entire Public Housing portfolio. Our RAD application for the entire portfolio was approved in FY 2015, and we have begun the process of converting units under RAD.

*Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End*

**Authority Owned (Non-HUD) Housing Stock** - HACSB owns 1,199 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 breakdown of these units by Housing Program is detailed in the chart below.

Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End		
Housing Program *	Total Units	Overview of the Program
Market - Rate	451	Market Rate
State Funded	51	Funded by State of California
Locally Funded	459	HOME grant units, Redevelopment grant units, NSP
Other*	238	Project based vouchers *(Total PBV HA owned= 289, 51 units are also included as part of State Funded category)
<b>Total Other Housing Owned and/or Managed</b>	<b>1199</b>	
<p>* <b>Select Housing Program from:</b> Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for other non-MTW Public Housing Authorities, or Other.</p> <p>If Other, please describe: <b>Project Based Vouchers</b></p>		

The chart below lists the properties and total number of units in each property in the HACSB Authority Owned (Non-HUD) Housing Portfolio.

**AUTHORITY OWNED HOUSING STOCK**

Property Name	City	Total Units	Property Name	City	Total Units
Muni Property	Apple Valley	7	Bahia	Ontario	3
Desert View	Baker	24	Frankish Building (includes 4 commercial)	Ontario	20
Sunrise Vista	Barstow	156	Brockton	Redlands	8
Sunset Pointe	Barstow	144	Hampton Court	Redlands	24
9 <sup>th</sup> Street Property	Colton	3	Lombard	Redlands	4
Canyon Villas	Colton	46	Stillman	Redlands	9
Las Palmas	Fontana	16	Merrill	Rialto	24
Redwood Terrace	Fontana	68	Arrowhead Woods	San Bernardino	51
A Avenue	Hesperia	4	Yucca	San Bernardino	14
Sunnyside	Hesperia	30	Grandview Towers	Twin Peaks	40
Mesa Gardens	Hesperia	29	Andalusia	Victorville	168
Sequoia	Hesperia	35	Sunset Gardens	Yucaipa	39
Stone Creek	Loma Linda	20	Third Street	Yucaipa	19
Van Leuven (14/8)	Loma Linda	22	Yucaipa Crest	Yucaipa	45
Mentone (State)	Mentone	34	Yucaipa Terrace	Yucaipa	51
Crafton	Mentone	5	Scattered Sites	Various	3
Kingsley Patio	Montclair	34	-	-	-
<b>TOTAL ALL AUTHORITY OWNED HOUSING STOCK: 1,199</b>					

## B. MTW REPORT: LEASING INFORMATION

### Actual Number of Households Served at the End of the Fiscal Year

#### Public Housing

Actual Number of Households Served at the End of the Fiscal Year		
<b>Housing Program: Federal MTW Public (Affordable) Housing</b>		
	<b>Number of Households Served*</b>	
	<b>Planned</b>	<b>Actual</b>
Number of Units that were Occupied/Leased through Public (Affordable) Housing	1,165	1,122
<b>Total Projected and Actual Households Served</b>	<b>1,165</b>	<b>1,122</b>
* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.		
** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households served.		
<b>Housing Program: Federal MTW Public (Affordable) Housing</b>		
	<b>Unit Months Occupied/Leased****</b>	
	<b>Planned</b>	<b>Actual</b>
Number of Units that were Occupied/Leased through Public (Affordable) Housing	13,980	13,465
<b>Total Projected and Annual Unit Months Occupied/Leased</b>	<b>13,980</b>	<b>13,465</b>
<div style="border: 1px solid black; padding: 5px; background-color: #ffffcc;">                     The actual number of households served and unit months leased was below the projected number due to attrition-based vacancies at the Waterman Gardens Affordable Housing site. The vacancies were not filled in order to accommodate the redevelopment taking place at the property.                 </div>		
*** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of households served.		
**** Unit Months Occupied/Leased is the total number of months the housing PHA has occupied/leased units, according to unit category during the year.		
	<b>Average Number of Households Served Per Month</b>	<b>Total Number of Households Served During the Year</b>
Households Served through Local Non-Traditional Services Only	0	0

## Housing Choice Voucher

Actual Number of Households Served at the End of the Fiscal Year		
<b>Housing Program: Federal MTW Housing Choice Voucher</b>		
	<b>Number of Households Served*</b>	
	<b>Planned</b>	<b>Actual</b>
Number of Units that were Occupied/Leased through Housing Choice Voucher Property-Based Assistance Programs **	1,170	720
Number of Units that were Occupied/Leased through Housing Choice Voucher Tenant-Based Assistance Programs **	8,099	7,385
Port-In Vouchers (not absorbed)	N/A	25
<b>Total Projected and Actual Households Served</b>	<b>8,104</b>	<b>8,130</b>
* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.		
** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households served.		
<b>Housing Program: Federal MTW Housing Choice Voucher</b>		
	<b>Unit Months Occupied/Leased****</b>	
	<b>Planned</b>	<b>Actual</b>
Number of Units that were Occupied/Leased through Housing Choice Voucher Property-Based Assistance Programs ***	14,040	8,639
Number of Units that were Occupied/Leased through Housing Choice Voucher Tenant-Based Assistance Programs ***	83,208	88,617
Port-In Vouchers (not absorbed)	N/A	298
<b>Total Projected and Annual Unit Months Occupied/Leased</b>	<b>97,248</b>	<b>97,554</b>
<p>We conservatively projected to be at 98% utilization with a goal to reach or exceed 100% of our MTW baseline if fungibility and cost-efficiencies through MTW activities support it. Without sequestration we were able to slightly exceed our projected lease-up rate for 2015.</p>		
*** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of households served.		
**** Unit Months Occupied/Leased is the total number of months the housing PHA has occupied/leased units, according to unit category during the year.		
	<b>Average Number of Households Served Per Month</b>	<b>Total Number of Households Served During the Year</b>
Households Served through Local Non-Traditional Services Only	X	X

## Local, Non-Traditional MTW Funded Programs

Actual Number of Households Served at the End of the Fiscal Year		
<b>Housing Program: Local, Non-Traditional Programs</b>		
	<b>Number of Households Served*</b>	
	<b>Planned</b>	<b>Actual</b>
Number of Units that were Occupied/Leased through Local, Non-Traditional Property-Based Assistance Programs **	0	0
Number of Units that were Occupied/Leased through Local, Non-Traditional Tenant-Based Assistance Programs **	0	0
<b>Total Projected and Actual Households Served</b>	<b>0</b>	<b>0</b>
* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.		
** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households served.		
<b>Housing Program: Local, Non-Traditional Programs</b>		
	<b>Unit Months Occupied/Leased****</b>	
	<b>Planned</b>	<b>Actual</b>
Number of Units that were Occupied/Leased through Local, Non-Traditional Property-Based Assistance Programs ***	0	0
Number of Units that were Occupied/Leased through Local, Non-Traditional Tenant-Based Assistance Programs ***	0	0
<b>Total Projected and Annual Unit Months Occupied/Leased</b>	<b>0</b>	<b>0</b>
N/A		
*** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of households served.		
**** Unit Months Occupied/Leased is the total number of months the housing PHA has occupied/leased units, according to unit category during the year.		
	<b>Average Number of Households Served Per Month</b>	<b>Total Number of Households Served During the Year</b>
Households Served through Local Non-Traditional Services Only	X	X

*Reporting Compliance with Statutory MTW Requirements – 75% of Families Assisted are Very Low-Income*

Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-Income								
<p>HUD will verify compliance with the statutory objective of “assuring that at least 75 percent of the families assisted by the Agency are very low-income families” is being achieved by examining public housing and Housing Choice Voucher family characteristics as submitted into the PIC or its successor system utilizing current resident data at the end of the agency's fiscal year. The PHA will provide information on local, non-traditional families provided with housing assistance at the end of the PHA fiscal year, not reported in PIC or its successor system, in the following format:</p>								
Fiscal Year:	2011	2012	2013	2014	2015	2016	2017	2018
Total Number of Local, Non-Traditional MTW Households Assisted	0	0	0	0	0	X	X	X
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	0	0	0	0	0	X	X	X
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	0	0	0	0	0	X	X	X

**Reporting Compliance with Statutory MTW Requirements – Maintain Comparable Mix**

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix					
In order to demonstrate that the statutory objective of “maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration” is being achieved, the PHA will provide information in the following formats:					
Baseline for the Mix of Family Sizes Served					
Family Size:	Occupied Number of Public Housing units by Household Size when PHA Entered MTW	Utilized Number of Section 8 Vouchers by Household Size when PHA Entered MTW	Non-MTW Adjustments to the Distribution of Household Sizes *	Baseline Number of Household Sizes to be Maintained	Baseline Percentages of Family Sizes to be Maintained
1 Person	442	2,801	-	3,243	35%
2 Person	338	1,619	-	1,957	21%
3 Person	279	1,187	-	1,466	16%
4 Person	222	1,003	-	1,225	13%
5 Person	142	567	-	709	8%
6+ Person	183	569	-	752	8%
Totals	1,606	7,746	-	9,352	100%

*Continued on next page.*

Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized

N/A

**Mix of Family Sizes Served**

	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained **	34.7%	20.9%	15.7%	13.1%	7.6%	8.0%	100%
Number of Households Served by Family Size this Fiscal Year ***	3641	2158	1680	1337	896	734	10446
Percentages of Households Served by Household Size this Fiscal Year ****	34.9%	20.7%	16.1%	12.8%	8.6%	7.0%	100%
Percentage Change	0.6%	-1%	3%	-0.872	-0.914	-0.93	0.001

Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages

HACSB did not experience a variation of over 5% from the baseline percentages.

\* "Non-MTW adjustments to the distribution of family sizes" are defined as factors that are outside the control of the PHA. Acceptable "non-MTW adjustments" include, but are not limited to, demographic changes in the community's population. If the PHA includes non-MTW adjustments, HUD expects the explanations of the factors to be thorough and to include information substantiating the numbers used.

\*\* The numbers in this row will be the same numbers in the chart above listed under the column "Baseline percentages of family sizes to be maintained."

\*\*\* The methodology used to obtain these figures will be the same methodology used to determine the "Occupied number of Public Housing units by family size when PHA entered MTW" and "Utilized number of Section 8 Vouchers by family size when PHA entered MTW" in the table immediately above.

\*\*\*\* The "Percentages of families served by family size this fiscal year" will reflect adjustments to the mix of families served that are directly due to decisions the PHA has made. HUD expects that in the course of the demonstration, PHAs will make decisions that may alter the number of families served.

*Description of Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Fiscal Year End*

Description of any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Fiscal Year End	
Housing Program	Description of Leasing Issues and Solutions
Public Housing	No issues related to leasing at fiscal year end
Authority Owned Portfolio	No issues related to leasing at fiscal year end
Housing Choice Voucher	No issues related to leasing at fiscal year end

*Number of Households Transitioned to Self-Sufficiency by Fiscal Year End*

HACSB has adopted the definitions of self-sufficiency listed below for the activities that have the statutory objective of self-sufficiency and/or for which we are required to report on Standard Metric SS #8 (Households Transitioned to Self-Sufficiency). While the definitions differ very slightly, the overarching definition for the families in these activities is a voluntary termination of housing assistance, as well as other forms of government assistance due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to enable transition to market-rate housing or homeownership. The criteria generally used to identify these individuals is:

- Voluntary termination of housing assistance;
- Total household income of 80% of AMI or greater at time of termination;
- Total household income from other forms of government assistance (TANF, cash aid, etc.) of \$0 at time of termination.

In FY 2015, a total of 57 families transitioned to self-sufficiency through our activities, 55 more than in FY 2014. While some MTW activities contributed to the families’ transition away from housing assistance more than others, we believe that the combined results of all our MTW activities led to the greater number of transitions this year. In FY 2015 HACSB continued to work with our community partners, including the San Bernardino County Transitional Assistance Department (TAD), and the County Workforce Development Department (WDD) to provide our families

the tools, services, and support they need to begin their transition to being able to afford market-rate housing. HACSB’s Homeownership program staff also worked closely with our families to provide information and guidance about the Section 32 homeownership program.

Number of Households Transitioned To Self-Sufficiency by Fiscal Year End		
Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency
Activity 4 - Biennial Recertifications	57	Having a total gross household income at or above 80% of the Area Median Income for the family size (at the time of end of participation).
Activity 10 - Minimum Rent	0	Having a total gross household income at or above 80% of the Area Median Income for the family size (at the time of end of participation).
Activity 15 - Pilot Work Requirement	5	Voluntary termination of housing assistance and other forms of government assistance (TANF, Calworks, cash aid, etc) due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to market-rate housing or homeownership
Activity 19 - Local FSS Program	0	Voluntary termination of housing assistance and other forms of government assistance (TANF, Calworks, cash aid, etc) due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to market-rate housing or homeownership
Activity 20 - Five Year Lease Assistance Program	6	Termination of housing assistance and other forms of government assistance (TANF, Calworks, cash aid, etc) due to an increase in income in attainment of and/or increased level in employment to transition to market-rate housing or homeownership in the 5 year program timeframe.
Activity 22 - Streamlined Lease Assistance	11	Having a total gross household income at or above 80% of the Area Median Income for the family size (at time of end of participation).
Activity 23 -No Child Left Unsheltered	0	Having a total gross household income at or above 80% of the Area Median Income for the family size (at time of end of participation).
Activity 24 - Transition for Over-Income families	31	Having a total gross household income at or above 80% of the Area Median Income for the family size (at time of end of participation).
Households Duplicated Across Activities/Definitions	53	* The number provided here should match the outcome reported where metric SS #8 is used.
<b>ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY</b>	<b>57</b>	

The Biennial Recertification Activity (No. 4) is not expected to directly result in any transitions to self-sufficiency. The goal of the activity is administrative efficiency, and HACSB feels it is unlikely that the activity will provide sufficient incentive or income retention to enable families to transition out of housing assistance. In FY 2015, 57 families with biennial recertifications transitioned to self-sufficiency. HACSB believes that these transitions are the result of the collective impact of our other activities.

As anticipated, Activity 10, HACSB's Local Minimum Rent activity, did not result in any transitions to self-sufficiency. Through this activity the minimum rent was raised from the current regulatory maximum of \$50 to \$125. HACSB believes that this change is not sufficient to provide incentive to achieve self-sufficiency.

HACSB's Pilot Work Requirement, Activity 15, was implemented on January 1, 2013, at the Maplewood Homes Public Housing Community. A six month grace period was provided for families to become compliant with the new program requirements. The activity has demonstrated positive trends in outcomes leading to self-sufficiency, and five households transitioned to self-sufficiency through this activity in FY 2015.

Our local FSS program, Activity 19, was implemented in July 2012. The program includes two groups of participants: a control group, which participates under the same rules as the traditional FSS program, and a local group, which participates under the rules of HACSB's local FSS program. The two groups allow HACSB to compare the results and identify advantages and disadvantages of each program type. This activity did not directly result in any transitions to self-sufficiency in FY 2015.

Implemented on January 1, 2012, Activity 20, the Five Year Lease Assistance Program, include 1,353 households as of September 30, 2015. HACSB continues to work with Loma Linda University to assist in the longitudinal study that will examine our families and their success over time. In FY 2015, six households transitioned to self-sufficiency through this activity.

Activity 22 - The Streamlined Lease Assistance Program, was implemented on February 1, 2015, and has already resulted in 11 transitions to self-sufficiency. This activity simplifies the rent calculation and eliminates interim recertifications for changes in income, thereby allowing the family to budget for rent and keep the entire amount of any increases to household income between biennial recertifications.

No Child Left Unsheltered (Activity 23) has not resulted in any transitions to self-sufficiency. This activity targets chronically homeless families with school-age children, helping them to obtain stable housing and supportive services. HACSB's goal is that assisted families will achieve self-sufficiency with the assistance our KEYS non-profit, which provides coaching and case work for these families, and community partners providing resources and mental health services.

The Transition for Over-Income Families (Activity 24) was implemented on April 1, 2015. This activity requires Public Housing families to move, thus enabling HACSB to assist more families on the waitlist, and HCV families to move or remain with their current landlord with no housing assistance. Because households will be transitioned out of assistance when the household's income reaches or exceeds 80% of AMI, this activity requires families to budget their income appropriately in order to prepare for homeownership or renting at market rates. 31 families were transitioned out of housing assistance in FY 2015 through this activity.

## C. MTW REPORT: WAIT LIST INFORMATION

### *Wait List Information at Fiscal Year End*

Wait List Information at Fiscal Year End				
Housing Program(s) *	Wait List Type **	Number of Households on Wait List	Wait List Open, Partially Open or Closed ***	Was the Wait List Opened During the Fiscal Year
Federal MTW Public Housing Units	Site-Based	24,720	Partially Open	Yes
Federal MTW Housing Choice Voucher Program (Tenant Based)	Community-Wide	15,263	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based)	Site-Based	9,865	Partially Open	Yes
Federal MTW Housing Choice Voucher Program Project-Based - No Child Left Unsheltered	Other	-	Continuously Open	Yes

More can be added if needed.

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

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

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

The Public Housing (Affordable Housing) waiting lists were partially open during the FY for families with a composition of 3 or more persons. The two and three bedroom waiting lists for the communities in Chino, Colton, San Bernardino, and Redlands closed in November 2014 and the two bedroom waiting list for the Barstow community closed in May 2015. The waiting lists were closed as there was sufficient quantity on those waiting lists to accommodate a 24 month period. The waiting lists that remained open accommodate the larger family sizes of 6 or more persons. In addition the two Public Housing senior waiting lists remained open during the full FY.

The Project-Based (PBV) waiting lists were partially open for the senior communities during the FY. There was one new waiting list that opened for PBV senior communities, Meadowbrook Towers in November 2014, located in the City of San Bernardino. The majority of the PBV family waiting lists remained closed due to the sufficient quantity of applicants to accommodate a 24 month period. However Region 4 (Barstow) and Region 5 (Yucca Valley) were opened for all bedroom sizes in March 2015. There were two new waiting list for PBV families, Valencia Grove located in the City of Redlands, opened in April 2015 and Arrowhead Commons located in the City of San Bernardino opened in February 2015. Due to the volume of pre-applications received, the Arrowhead Commons waiting list closed in October 2015.

The Housing Choice Voucher (HCV) waiting list opened February 19, 2015 and closed March 9, 2015. A total of 24,854 pre-applications were received. The lottery process was applied to the full waiting list and the top 15,000 pre-applications were placed on the final HCV waiting list. This number reflects the anticipated number of households that could be selected from the waiting list within two years.

If Local, Non-Traditional Program, please describe:

N/A

If Other Wait List Type, please describe:

Project-Based No Child Left Unsheltered: centrally managed, site/region specific, by bedroom size

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

HACSB has not made any changes to the organizational structure of the waitlist or policy changes regarding the waitlist.

## Section III: Proposed MTW Activities

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All proposed activities that have been previously granted approval by HUD are reported in Section IV as 'Approved Activities.' No new activities are proposed at this time.

# Section IV: Approved MTW Activities

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This section provides HUD-required information detailing previously approved uses of MTW authority. In the following pages, we provide detailed information about ongoing MTW activities that were previously approved, with an update on any changes taking place in FY 2015. In accordance with the guidance provided in the revised Form HUD-50900, activities are organized in separate sections based on whether they are active, not yet implemented, or closed out.

## **A. Implemented Activities**

### **Activity 1: Single Fund Budget**

The flexibility granted under this activity is included in the statutory authorizations granted to MTW agencies. In accordance with HUD guidance, information related to this activity is included in Section V: Administrative.

## Activity 2: Strategic Investment Policies

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

### 1. Activity Description and Outcomes

HACSB has adopted investment policies consistent with California Government Code and/or HUD approved investment criteria to the extent such policies are in compliance with applicable OMB circulars and other federal laws. HACSB will invest only in securities authorized under state law that will allow the flexibility to invest productively, efficiently and securely. This activity enables the Housing Authority to achieve a portfolio that is safer, more liquid and contains a competitive yield. Under California investment policies, HACSB will be able to invest in stronger investment instruments with lower transaction costs, thus increasing overall investment returns.

HACSB has developed an investment policy for MTW funds that is consistent with California Government Code Section 53630 and/or HUD approved investment criteria. Due to the implementation of the U.S. Department of Housing and Urban Development's cash management provisions, existing PHA held NRA balances will be transitioned to HUD-held program reserves in FY 2016. As a result, we will have limited funds for investment. Any remaining funds will be invested in liquid investments to ensure that they are readily available if needed.

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

<b>Activity 2: Strategic Investment Policies CE #4: Increase in Resources Leveraged</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).	Actual amount leveraged after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Amount of funds leveraged in dollars.	\$0.00 were leveraged prior to implementation of the activity.	\$0.00 are expected to be leveraged as a result of new cash management procedures.	\$0.00 leveraged in FY 2015.	Yes, the outcome meets the benchmark for this metric.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

Standard Metric CE #4 was added in accordance with HUD's comments to our FY 2015 Annual MTW Plan. This report is the first to include this metric.

## **4. Changes to Data Collection Methodology**

None.

## Activity 4: Biennial Recertifications

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

### 1. Activity Description and Outcomes

Current regulation requires annual income recertifications for most participants of the Public Housing and Housing Choice Voucher programs. This activity allows HACSB to conduct recertifications of households biennially for all households in both the Public Housing and Housing Choice Voucher programs. The expanded initiative was implemented in 2012 with approximately half the households assigned to a biennial schedule. The remaining households were assigned to the biennial schedule in 2013. The first complete cycle of biennial certifications was completed in 2014.

<b>Activity 4: Biennial Recertifications</b> <b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total Cost of Annual Recertifications (Public Housing and Housing Choice Voucher Combined).	\$431,358  \$414,348 staff cost + \$17,010 postage cost  Staff Cost Calculation: 9,000 recertifications X 1.62 hours per recertification = 12,376 hours X 33.48 = \$414,348 staff cost	\$244,069 per year  \$254,858 staff cost + \$8,505 postage cost  Staff Cost Calculation: Est. 4500 recertifications per year X 1.62 hours per recertification = 7,290 hours X \$33.48 per hour	\$315,339 in FY 2015  \$302,291 staff cost + \$13,048 postage cost  Staff Cost Calculation: 9,029 hours X \$33.48 per hour = \$165,492	No, the outcome does not meet the benchmark for this activity in FY 2015. However, this activity has met the benchmark in prior years, and the additional cost associated with recertifications in FY 2015 is believed to be related to the implementation of new activities during the year, specifically related to additional time given to process reexaminations transitioning households to the Streamlined Lease Assistance Program and explaining the program.

<b>Activity 4: Biennial Recertifications CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff hours to conduct recertifications.	12,376 hours Elderly/Disabled Households: 306 hours for Public Housing; 2,224 hours for HCV in FY 2009. (0.85 hours to complete recertification) Non-Elderly/Non-Disabled Households: 1,393 hours for Public Housing; 8,453 hours for HCV in FY 2009 (1.62 hours per recertification)	6,199 hours Elderly/Disabled Households: 153 hours to complete recertifications in PH; 1,122 hours for HCV. The benchmarks will be the same for all forthcoming years. Non-Elderly/Non-Disabled Households: 697 hours to complete recertifications in PH; 4,227 hours for HCV. The benchmarks will be the same for all forthcoming years.	9,029 hours in FY 2015  Staff Time Calculation: 5,219 recertifications performed in PH and HCV programs X 1.73 hours per recertification	No, the outcome does not meet the benchmark for this activity in FY 2015. However, this activity has met the benchmark in prior years, and the additional cost associated with recertifications in FY 2015 is believed to be related to the implementation of new activities during the year.

<b>Activity 4: Biennial Recertifications</b> <b>CE #5: Increase in Tenant Rent Share</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average tenant rent share in dollars.	Average tenant rent share for biennial recertification households in FY 2011 prior to full implementation of the activity is \$281.	The average tenant rent share is not expected to change as a result of this activity.	The actual average tenant rent share in FY 2015 is \$312.	Yes, the outcome meets and exceeds the benchmark for this metric. However, the outcome is believed to be the result of other MTW activities.

<b>Activity 4: Biennial Recertifications</b> <b>SS #1: Increase in Household Income</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation.	Whether the outcome meets or exceeds the benchmark.
Average earned income of households.	Average earned income of biennial recertification households in FY 2011 prior to full implementation of the activity is \$4,734--.	The expected average earned income of households is not expected to change as a result of this activity.	The actual average earned income of households in FY 2015 is \$6,984.	Yes, the outcome meets and exceeds the benchmark for this metric. However, the outcome is believed to be the result of other MTW activities.

**Activity 4: Biennial Recertifications**  
**SS #3: Increase in Positive Outcomes in Employment Status**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category: (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full-Time	Head(s) of households employed full-time prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the employment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.  We are able to report the following baseline and FY 2015 employment data:  Heads of household employed prior to implementation of the activity (FY 2011): 2,018  Heads of household employed in FY 2015: 2,443  Percentage of work-able heads of household employed prior to implementation of the activity (FY 2011): 43.8%  Percentage of work-able heads of household employed in FY 2015: 50.5%		
	Percentage of total work-able households employed full-time prior to implementation of the activity is unknown.			
(2) Employed Part-Time	Head(s) of households employed part-time prior to implementation of the activity is unknown.	Percentage of work-able heads of household employed prior to implementation of the activity (FY 2011): 43.8%  Percentage of work-able heads of household employed in FY 2015: 50.5%		
	Percentage of total work-able households employed part-time prior to implementation of the activity is unknown.			

(3) Enrolled in an Educational Program	Head(s) of households enrolled in an educational program prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the educational program enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.		
	Percentage of total work-able households enrolled in an educational program prior to implementation of the activity is unknown.			
(4) Enrolled in Job Training Program	Head(s) of households enrolled in a job training program prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the job training enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.		
	Percentage of total work-able households enrolled in a job training program prior to implementation of the activity is unknown.			
(5) Unemployed	Head(s) of households unemployed prior to implementation of the activity is 8,214.	The number of heads of household unemployed after implementation of the activity is not expected to change as a result of this activity.	Heads of households unemployed in FY 2015 is 5,732	Yes, the outcome meets and exceeds the benchmark for this metric. However, the outcome is believed to be the result of other MTW activities.
	Percentage of total work-able households unemployed prior to implementation of the activity is 56.2%.	The percentage of work-able households unemployed after implementation of the activity is not expected to change as a result of this activity.	Percentage of total work-able heads of households unemployed in FY 2015 is 49.5%	Yes, the outcome meets and exceeds the benchmark for this metric. However, the outcome is believed to be the result of other MTW activities.

(6) Other	Head(s) of households engaged in other activities prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about participant's participation in other activities, but we are working to develop a method for doing so in order to be able to report this data in future years.
	Percentage of total work-able households engaged in other activities prior to implementation of the activity is unknown.	

<b>Activity 4: Biennial Recertifications</b>				
<b>SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving TANF assistance.	Number of households receiving TANF in FY 2011 prior to full implementation of the activity is 3,054 (29.8% of all MTW households).	The number of households receiving TANF after implementation of the activity is not expected to change as a result of this activity.	Actual households receiving TANF in FY 2015 is 2,186 (26.7% of all MTW households).	Yes, this outcome meets and exceeds the benchmark. However, it is believed that the decrease in the number of households receiving TANF assistance is the result of other MTW activities.

**Activity 4: Biennial Recertifications**  
**SS #8: Households Transitioned to Self-Sufficiency**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency. For purposes of this activity, "self-sufficiency" is defined as having a total gross household income at or above 80% of the Area Median Income for the family size (at the time of end of participation).	The number of households transitioned to self-sufficiency prior to implementation of the activity is 57. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The number of households expected to be transitioned to self-sufficiency as a result of the activity is 0.	The number of households transitioned to self-sufficiency in FY 2015 is 57.	Yes, the outcome meets and exceeds the benchmark for this metric. However, the outcome is believed to be the result of other MTW activities.

**2. Challenges and Strategy Revisions**

None.

### **3. Measurement Revisions**

Standard metrics CE #5, SS #1, SS #3, SS #4, and SS #8 were added in HACSB's 2015 Annual Plan per HUD's request. The objective of the activity is to achieve agency cost and staff time savings. As a result, HACSB does not anticipate that these metrics will reflect an increase in tenant rent share, household income, positive outcomes in employment status, households removed from TANF, or households transitioned to self-sufficiency as a direct result of this activity.

As of the time of this report, pre-implementation baseline data for standard metric SS #8 is unavailable. In accordance with written instruction from HUD, data from the current report year has been used to establish the baseline for this metric. Additionally, we are unable to report fully on Standard Metric SS #3, which was added through HACSB's 2015 MTW Annual Plan and not approved by HUD until February 13, 2015, well into HACSB's fiscal year. HACSB does not currently collect or maintain detailed information about the employment status, education enrollment status, job training enrollment status, or other activity of all participants, but we are working to develop a method for doing so in order to be able to report this data for Standard Metric SS #3 in future years.

### **4. Changes to Data Collection Methodology**

None.

## Activity 5: Local Verification Policies

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

### 1. Activity Description and Outcomes

Through this activity HACSB has implemented local verification policies for both the Public Housing and Housing Choice Voucher programs. The verification form used by HACSB was modified in FY 2011 to include Upfront Income Verification using HUD's Enterprise Income Verification (EIV) as the highest standard of verification. The secondary standard is documents observed to be satisfactory to verify income and source provided by the household. If additional verification is required, a third party written verification is requested. Third party oral verification is permitted as the lowest ranking type of income verification.

This activity has simplified the process for our families and the housing staff, reducing staff time spent on verifications and agency costs. As a result of this activity, staff time spent on verifications has decreased significantly from the baseline time reported. The benchmarks for this activity have been partially met each year from 2010 to 2013, and were fully met in FY 2014. As of FY 2015, the total time spent on verifications has decreased by 79% from the baseline year.

<i>Activity 5: Local Verification Policies</i> <i>CE #1: Agency Cost Savings</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of income verification process	\$242,867  6,947 hours X \$34.96 staff cost per hour	\$160,117  4,580 hours X \$34.96 staff cost per hour	\$50,692 in FY 2015  Staff Cost Calculation: 1,450 hours X \$34.96 staff cost per hour	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 5: Local Verification Policies CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours to conduct verifications	6,947 total hours  1,133 hours to process verifications in Public Housing; 5,814 in HCV (0.7 in PH and 0.8 in HCV to conduct verifications)	4,580 total hours  705 hours to process verifications in PH; 3,875 in HCV. The benchmarks will be the same for all forthcoming years.	1,450 total hours in FY 20154	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 5: Local Verification Policies CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in completing verifications.	Average error rate of verifications prior to implementation of the activity is 44%. (HACSB used data from FY 2011-2012 to establish the baseline data for this metric.	The average error rate of verifications is not expected to change as a result of this activity.	The actual average error rate of verifications in FY 2015 is 41%.	Yes, the outcome meets and exceeds the benchmark for this metric.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

Standard metric CE #3 was added in HACSB's 2015 Annual Plan per HUD's request. The objective of the activity is to achieve agency cost and staff time savings. As a result, HACSB does not anticipate that the metric CE #3 will reflect a decrease in the average error rate related to verifications as a direct result of this activity.

## **4. Changes to Data Collection Methodology**

None.

## Activity 6: Elimination of Assets

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

### 1. Activity Description and Outcomes

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

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

The established benchmarks were met in FY 2010 and have continued to be met since that time. No staff time is spent calculating asset income in our Public Housing and Housing Choice Voucher Programs. This activity benefits our families, and no hardship requests have been received related to this activity.

<i>Activity 6: Elimination of Assets CE #1: Agency Cost Savings</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total agency cost to collect and calculate asset income for both PH and HCV.	\$51,671  1,478 hours X \$34.96 average staff cost per hour.	Zero cost in FY 2014 and beyond	Zero dollars spent in FY 2015 to collect and calculate asset income for PH and HCV.	Yes, the outcome meets the benchmark for this metric.

<b>Activity 6: Elimination of Assets CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours of staff time to collect and calculate asset income for both PH and HCV	1,478 hours	Zero hours in FY 2010 and beyond	Zero hours in FY 2015	Yes, the outcome meets the benchmark for this activity.

<b>Activity 6: Elimination of Assets CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in calculating assets.	Average error rate in calculating assets prior to implementation of the activity is 0%. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The average error rate in calculating assets is not expected to change as a result of this activity.	The actual average error rate in calculating assets in FY 2015 is 0%.	Yes, the outcome meets the benchmark for this metric.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

Standard metric CE #3 was added in HACSB's 2015 Annual Plan per HUD's request. The objective of the activity is to achieve agency cost and staff time savings. As a result, HACSB does not anticipate that the metric CE #3 will reflect a decrease in the average error rate related to calculation of assets as a direct result of this activity. Additionally, pre-implementation baseline data for standard metric CE #3 is unavailable. In accordance with written instruction from HUD, data from the current report year has been used to establish the baseline for this metric.

## **4. Changes to Data Collection Methodology**

None.

## Activity 7: Controlled Program Moves

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

### 1. Activity Description and Outcomes

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

This activity has resulted in a significant decrease in agency costs and staff time spent related to processing moves. In FY 2015, both costs and time spent reflected approximately a 38% decrease over the baselines. In prior years this policy has successfully reduced the number of moves processed annually, but the amount of time necessary to process each move increased by approximately 10% to ensure compliance with this requirement. In FY 2015, the staff time spent per move decreased below the baseline value. However, due to the large number of port-ins in FY 2015, the benchmarks for staff time and cost savings have not yet been reached.

<b>Activity 7: Controlled Program Moves CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total Cost of Moves Annually (including out-bound portability)	\$171,933 Annually  \$160,781 for moves(4599 hours * \$34.96 average staff cost per hour or 958 moves per year) \$11,152 for out-bound portability (319 hours * \$34.96 average staff cost per hour)	\$56,217 Annually  \$50,622 for moves (1,448 hours *\$34.96 average staff cost per hour or 302 moves per year) \$5,595 for out-bound portability (160 hours *\$34.96 average staff cost per hour)	\$105,789 in FY 2015  Staff Cost Calculation: \$85,862 for moves (2,456 hours X \$34.96 average staff cost per hour). \$19,927 for port-outs (570 hours X \$34.96 average staff cost per hour).	No, the outcome does not meet the benchmark for this activity. Although the benchmark was not met, a significant decrease was realized (38%).

<b>Activity 7: Controlled Program Moves CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours annually to process program moves (including out-bound portability)	4,918 hours annually  4,599 hours to process program moves annually (4.8 hours per move X 958 moves). 319 hours to process outbound portability in 2009	1,608 hours annually  1,448 hours spent to process moves annually. 160 hours to process outbound ports. The benchmark will be the same for all forthcoming years.	3,116 hours in FY 2015  Staff Time Calculation: 2,546 hours spent to process moves annually (4.39 hours per move X 580 moves)  570 hours to process outbound portability for FY 2015 (250 port outs X 2.28 hours per port out)	No, the outcome does not meet the benchmark for this metric. Although the benchmark was not met, a significant decrease was realized (36%).

**2. Challenges and Strategy Revisions**

None.

**3. Measurement Revisions**

None.

**4. Changes to Data Collection Methodology**

None.

## Activity 8: Local Policies for Portability

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

### 1. Activity Description and Outcomes

Through this activity, HACSB applies the requirements of its ongoing MTW activities to inbound portability participants.

This activity has resulted in significant staff time savings. In FY 2015, staff hours spent on inbound portability participants were reduced by 68% over the baseline year. All benchmarks for this activity have been fully or partially met since FY 2010.

<i>Activity 8: Local Policies for Portability CE #1: Agency Cost Savings</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of portability in dollars.	\$70,060 in FY 2009  Staff cost calculation: 2,004 hours X \$34.96 average staff cost per hour	\$35,029 in FY 2015 and beyond.	\$22,287 in FY 2015  Staff Cost Calculation: 637.5 hours X \$34.96 average staff cost per hour	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 8: Local Policies for Portability CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours of staff time spent annually to process in-bound portability	2,004 hours in FY 2009	1,002 hours  The benchmark will be the same for all forthcoming years.	637.5 hours in FY 2015  Staff Time Calculation: 2.55 hours per port-in, 250 port-ins in FY2015.	Yes, the outcome meets and exceeds the benchmark for this metric.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

In accordance with HUD's comments during the approval process for HACSB's 2015 Annual MTW Plan, the previously reported standard metric SS #1: Increase in Household Income has been removed, and standard metric CE #1: Agency Cost Savings, has been added.

## **4. Changes to Data Collection Methodology**

None.

## Activity 9: Elimination of Earned Income Disallowance

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

### 1. Activity Description and Outcomes

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

During FY 2015, no families received the EID, thus zero staff hours were spent in managing EID. The benchmarks for this activity have been fully met since 2009. No hardship requests were received related to this activity.

<i>Activity 9: Elimination of Earned Income Disallowance CE #1: Agency Cost Savings</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total annual cost of staff time spent to process EID	\$1,974 total  Total annual cost to process EID in FY 2009 for HCV program was \$193. Total annual cost to process EID in FY 2009 for PH program was \$1,764.	Zero cost to process EID in FY 2010 and beyond.	The actual average agency cost to process EID in FY 2015 is \$0.	Yes, the outcome meets the benchmark for this metric.

<b>Activity 9: Elimination of Earned Income Disallowance CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours of staff time spent to process EID	58.4 total hours of staff time in FY 2009.  Staff Time Calculation: 5.7 hours to manage EID in HCV in FY 2009. 52.7 hours to manage EID for PH in FY 2009.	Zero hours of staff time in FY 2010 and beyond.	The actual amount of total staff time to manage EID is zero in FY 2015.	Yes, the outcome meets the benchmark for this metric.

<b>Activity 9: Elimination of Earned Income Disallowance CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in processing the earned income disallowance.	Average error rate in processing the earned income disallowance prior to implementation of the activity is 0%. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The expected average error rate of processing the earned income disallowance after implementation of the activity is 0%.	Actual average error rate of processing the earned income disallowance after implementation of the activity is 0%.	Yes, the outcome meets the benchmark for this metric.

<b>Activity 9: Elimination of Earned Income Disallowance CE #5: Increase in Tenant Rent Share</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average tenant rent share in dollars for households with the earned income disallowance.	Average tenant rent share in dollars for households with the earned income disallowance prior to implementation of the activity is \$0. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The average tenant rent share for households with the earned income disallowance will not change.	The actual average tenant rent share for households with the earned income disallowance in FY 2015 is \$0. (No households received the EID in FY 2015)	Yes, the outcome meets the benchmark for this metric.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

The previously reported standard metrics (SS #1: Increase in Household Income and SS #6: Reducing Per Unit Subsidy Costs for Participating Households) have been removed per HUD's comments during the approval process for HACSB's 2015 Annual MTW Plan.

Standard Metrics CE #3 and CE #5 were added in HACSB's 2015 Annual Plan per HUD's request. As of the time of this report, pre-implementation baseline data for these metrics is unavailable. In accordance with written instruction from HUD, the current report year has been used to establish the baseline for these metrics. Additionally, the objective of the activity is to achieve agency cost and staff time savings. As a result, HACSB has established the benchmarks for Standard Metrics CE #3 and CE #5 as no change.

## **4. Changes to Data Collection Methodology**

None.

## Activity 10: Minimum Rent

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

### 1. Activity Description and Outcomes

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

This activity has resulted in increased earned income for households paying the minimum rent of \$125. The average earned income of households paying minimum rent has increased from by 44% from \$718 prior to implementation to \$1,031 in FY 2015. Additionally, the benchmark related to tenant rent share was met in FY 2014 and continues to be met. There have been no requests for hardship exemption from the minimum rent.

<i>Activity 10: Minimum Rent</i> <i>CE #5: Increase in Tenant Rent Share</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average tenant rent share in dollars for minimum rent households	Average tenant rent share for minimum rent households prior to implementation of the activity is \$33.	The average tenant rent share for minimum rent households will increase by \$40 to \$73.	The actual average tenant rent share for minimum rent households in FY 2015 is \$149.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 10: Minimum Rent</b> <b>SS #1: Increase in Household Income</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation.	Whether the outcome meets or exceeds the benchmark.
Average earned income of households with TTP at or less than \$125 in dollars.	The average earned income for PH and HCV households with TTP at or less than \$125 prior to implementation of this activity is \$718.	The average earned income for households with TTP at or less than \$125 will increase to \$5,000.	The average earned income for households with TTP less than or equal to \$125 is \$915 in FY 2015.	No, the benchmark for this activity has not yet been met.

<b>Activity 10: Minimum Rent</b> <b>SS #3: Increase in Positive Outcomes in Employment Status</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.

(1) Employed Full-Time	Head(s) of households employed full-time prior to implementation of the activity is unknown.	<p>HACSB does not currently collect or maintain detailed information about the employment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.</p> <p>We are able to report the following baseline and FY 2015 employment data:</p> <p>Heads of household employed prior to implementation of the activity (FY 2009): 16 of 286 (5.6%)</p> <p>Heads of household employed in FY 2015: 116 of 789 (14.7%)</p> <p>Percentage of work-able heads of household employed prior to implementation of the activity (FY 2009): 38.3%</p> <p>Percentage of work-able heads of household employed in FY 2015: 14.8% (108 of 729 work-able heads of household)</p>
	Percentage of total work-able households employed full-time prior to implementation of the activity is unknown.	
(2) Employed Part-Time	Head(s) of households employed part-time prior to implementation of the activity is unknown.	<p>HACSB does not currently collect or maintain detailed information about the educational program enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.</p>
	Percentage of total work-able households employed part-time prior to implementation of the activity is unknown.	
(3) Enrolled in an Educational Program	Head(s) of households enrolled in an educational program prior to implementation of the activity is unknown.	<p>HACSB does not currently collect or maintain detailed information about the educational program enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.</p>
	Percentage of total work-able households enrolled in an educational program prior to implementation of the activity is unknown.	

(4) Enrolled in Job Training Program	Head(s) of households enrolled in a job training program prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the job training enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.		
	Percentage of total work-able households enrolled in a job training program prior to implementation of the activity is unknown.			
(5) Unemployed	Head(s) of households unemployed prior to implementation of the activity is 270 of 286 (94.4%)	The number of unemployed minimum rent heads of household is expected to be no more than 90% of all minimum rent heads of household.	Minimum rent heads of households unemployed in FY 2015 is 673 of 789 (86.6%)	Yes, the outcome meets and exceeds the benchmark for this portion of this metric.
	Percentage of total work-able households unemployed prior to implementation of the activity is 61.7%	The percentage of work-able unemployed minimum rent heads of household is expected to be no more than 90% of all work-able minimum rent heads of household.	Percentage of total work-able minimum rent heads of household unemployed in FY 2015 is 91.5% (621/679)	No, the outcome does not meet the benchmark for this portion of this metric. However, the outcome is within 1.5% of meeting the benchmark.
(6) Other	Head(s) of households engaged in other activities prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information for all participants about participation in other activities, but we are working to develop a method for doing so in order to be able to report this data in future years.		
	Percentage of total work-able households engaged in other activities prior to implementation of the activity is unknown.			

<b>Activity 10: Minimum Rent</b>				
<b>SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number).	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of minimum rent households receiving TANF assistance.	Number of minimum rent households receiving TANF assistance prior to implementation of the activity is 30 of 286 (10.5% of all minimum rent households).	The number of minimum rent households receiving TANF after implementation of the activity is expected to be no more than 50%.	Number of minimum rent households receiving TANF in FY 2015 is 1,049 of 2,881 (36.4% of all minimum rent households).	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 10: Minimum Rent SS #8: Households Transitioned to Self-Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of minimum rent households transitioned to self-sufficiency. For purposes of this activity, "self-sufficiency" is defined as having a total gross household income at or above 80% of the Area Median Income for the family size (at the time of end of participation).	The number of minimum rent households transitioned to self-sufficiency prior to implementation of the activity is 0.	The number of minimum rent households expected to transition to self-sufficiency after implementation of the activity is 0.	The number of minimum rent households transitioned to self-sufficiency in FY 2015 is 0.	Yes, the outcome meets the benchmark for this metric.

## 2. Challenges and Strategy Revisions

None.

### **3. Measurement Revisions**

The previously reported standard metric (SS #6: Reducing per Unit Subsidy Costs for Participating Households) has been removed per HUD's comments during the approval process for HACSB's 2015 Annual MTW Plan.

Standard metrics SS #3, SS #4, and SS #8 were added in HACSB's 2015 Annual Plan per HUD's comments. The objective of the activity is to achieve agency cost and staff time savings, and HACSB does not anticipate that these metrics will reflect an increase in positive outcomes in employment status, households removed from TANF, or households transitioned to self-sufficiency as a direct result of this activity.

As of the time of this report, pre-implementation baseline data for standard metric SS #8 is unavailable. In accordance with written instruction from HUD, data from the current report year has been used to establish the baseline for this metric. Additionally, we are unable to report fully on Standard Metric SS #3, which was added through HACSB's 2015 MTW Annual Plan and not approved by HUD until February 13, 2015, well into HACSB's fiscal year. HACSB does not currently collect or maintain detailed information about the employment status, education enrollment status, job training enrollment status, or other activity of all participants, but we are working to develop a method for doing so in order to be able to report this data for Standard Metric SS #3 in future years. Data from the current report year has been used to establish the baseline for this metric where possible.

### **4. Changes to Data Collection Methodology**

None.

## Activity 11: Local Project-Based Voucher Program

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

### 1. Activity Description and Outcomes

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

- Up to 100% percent of units in any development may be project-based;
- Up to 25% of the funding committed to vouchers may be allocated for PBV;
- PBV will be allocated to all of the public housing units approved for disposition other than 27 units to be rehabilitated in conjunction with the County Department of Behavioral Health (308 PBV units);
- Households residing in PBV units will not have automatic priority to receive tenant-based vouchers after one year, but instead will have such a priority after two years;
- A local PBV HAP contract which modifies the terms and conditions of the HAP contract, including the ability to execute PBV HAP contracts for groupings of non-contiguous scattered-site properties and to contract for a total number of units by bedroom size within a development rather than for specific units;
- An over-housed household residing in a Public Housing unit that is disposed of and converted to a Project-Based Voucher may remain in its unit and HACSB will subsidize the household based on the size of the unit, not the qualifying voucher size;
- HACSB may require an under-housed household residing in a Public Housing unit that is disposed of and converted to a Project-Based Voucher to move with a voucher for the number of bedrooms for which the household qualifies;
- For a unit other than former Public Housing units, HACSB may designate the unit as a PBV unit and allow an in-place household for which the unit is a wrong-sized unit to remain in occupancy for up to one year, if the owner agrees to accept a PBV contract rent that does not exceed the HACSB subsidy standard for the household for the initial term of the lease.
- Initial contract rent for units owned by HACSB as defined in the PBV regulations may be determined using an HACSB market study that will consider local rental submarkets, in lieu of the requirement to use an independent entity with rents based on an appraisal by a state-certified appraiser.

At the commencement of this activity in FY2009, HACSB had 349 PBV units. To date, HACSB has increased its PBV units to 1,115 available units.

<b>Activity 11: Local Project-Based Voucher Program CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of awarding PBV contracts.	Total average cost of awarding PBV contracts prior to implementation of the activity is \$3,438.60.  Cost calculation: 60 hours X \$57.31 hour (2015 loaded labor rate)	The expected average cost of awarding PBV contracts after implementation of this activity is \$1,719.30 (50% of baseline).	Actual average cost of awarding PBV contracts in FY 2015 is \$687.72  Cost calculation: 12 hours per contract X \$57.31/hour (2015 loaded labor rate)	Yes, the outcome meets and exceeds the benchmark for this activity.

<b>Activity 11: Local Project-Based Voucher Program CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total average staff time to award PBV contracts.	Total average amount of staff time dedicated to awarding PBV contracts prior to implementation of the activity is 60 hours per contract.	The expected average amount of staff time to award PBV contracts under this activity will decrease by 50%.	The actual average amount of staff time to award PBV contracts under this activity in FY 2015 is 12 hours per contract.	Yes, the outcome meets the benchmark for this activity.

<b>Activity 11: Local Project-Based Voucher Program HC #4: Displacement Prevention</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number).	Expected households losing assistance/moving after implementation of the activity (number).	Actual households losing assistance/moving after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households at or below 80% AMI that would lose assistance or need to move.	Households losing assistance/moving prior to implementation of the activity is 0. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	Expected households losing assistance/moving after implementation of the activity is 0.	This value will be provided with the FY 2016 Annual Report.	This value will be provided with the FY 2016 Annual Report.

<b>Activity 11: Local Project-Based Voucher Program Local Metric: Units of Project-Based Voucher Assistance Added to the HACSB Portfolio</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of units added to the HACSB portfolio as a result of this activity.	349 units.  At the time of implementation 3.76% of the HACSB portfolio consisted of PBV units.	1,856 units.  Total PBV units, including units owned by HACSB or its affiliates, will increase to 20% of the HACSB portfolio by 2018.	1,115 units in FY 2015.  In total, HACSB has increased its PBV units to - 13.5% of its portfolio.	No, the benchmark has not yet been achieved. The timeframe to achieve the benchmark has not yet been reached.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

The previously reported standard metric (HC #1: Additional Units of Housing Made Available) has been removed per HUD's request during the approval process for HACSB's 2015 Annual MTW Plan. The data previously reported using HC #1 will now be reported using the local metric listed above.

As of the time of this report, pre-implementation baseline data for standard metric HC #4 is unavailable. In accordance with written instruction from HUD, data from the current report year has been used to establish the baseline for this metric.

## **4. Changes to Data Collection Methodology**

None.

## Activity 12: Local Payment Standards

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

### 1. Activity Description and Outcomes

San Bernardino County is the largest county in the contiguous United States by area and larger than any of the nine smallest states combined. This activity allows HACSB to establish a local payment standard schedule that accurately reflects the varying rental submarkets that exist across our vast County. With the flexibility provided by this activity, HACSB does not use the HUD-published Fair Market Rents to establish payment standards for its jurisdiction. Instead, HACSB conducts a study of local market rents and establishes local payment standards for each of the nine submarkets that it has designated within its jurisdiction based upon the results of the market study. This activity has increased the housing choice for our families as they are now able to move to regions with better job prospects, transportation and schools in lower poverty areas.

Since implementation, this activity has shown a significant improvement in the number of families able to move to areas of opportunity. We have nearly met or exceeded the benchmarks for our local metric, which measures the number of households residing in the two submarkets with the highest poverty and minority concentration. Overall, the number of households residing in these two submarkets has decreased by 9% since implementation. This change reflects an increase in the number of families that have relocated out of these submarkets into other areas of greater opportunity. HACSB anticipates that this trend will continue, and that the number of families relocating out of these submarkets will hold steady or increase slightly.

**Activity 12: Local Payment Standards  
CE #1: Agency Cost Savings**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost to calculate and apply payment standards.	<p>Total cost to calculate and apply payment standards prior to implementation of the local payment standards activity is \$15,754.70.</p> <p>Cost calculation: 470.43 hours X \$33.49 (2015 loaded labor rate)</p> <p>(FY 2015 data used to establish baseline as data pre-implementation is unavailable)</p>	The cost to calculate and apply payment standards in future years is not expected to change. The baseline value is based on FY 2015, and the activity is fully implemented at this time.	This value will be provided with the FY 2016 Annual MTW report.	This value will be provided with the FY 2016 Annual MTW report.

**Activity 12: Local Payment Standards  
CE #2: Staff Time Savings**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff time to calculate and apply payment standards.	Total amount of staff time dedicated to calculating and applying payment standards prior to implementation of the local payment standards activity is 470.43 hours. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)  Staff Time Calculation: 2.7 minutes per file to identify/apply payment standard X 10,454 total actions (recertifications, moves, interims, and port-ins)	The total amount of staff time dedicated to calculating and applying payment standards is not anticipated to change in future years. The baseline value is based on FY 2015, and the activity is fully implemented at this time.	This value will be provided with the FY 2016 Annual MTW report.	This value will be provided with the FY 2016 Annual MTW report.

<b>Activity 12: Local Payment Standards HC #5: Increase in Resident Mobility</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number).	Expected households losing assistance/moving after implementation of the activity (number).	Actual households losing assistance/moving after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households at or below 80% AMI that would lose assistance or need to move.	Households losing assistance/moving prior to implementation of the activity is 995. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The expected number of households losing assistance/moving after implementation of the activity is not expected to change.	This data will be provided with the FY 2016 MTW Report.	This data will be provided with the FY 2016 MTW Report.

<b>Activity 12: Local Payment Standards Local Metric: Average HAP Cost</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average HAP cost for MTW units.	The average HAP cost of MTW units prior to implementation of this activity is \$535.87. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The average HAP cost for MTW units is not anticipated to change in future years as a direct result of this activity. The baseline value is based on FY 2015, and the activity is fully implemented at this time.	This data will be provided with the FY 2016 Annual MTW report.	This data will be provided with the FY 2016 Annual MTW report.

<b>Activity 12: Local Payment Standards</b>				
<b>Local Metric: Households Able to Move from Areas of Poverty and/or Minority Concentration</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Percentage of households residing in submarkets 2 and 6	The percentage of households residing in submarkets 2 and 6 prior to implementation are: Submarket 2: 25% Submarket 6: 21%	The percentage of households residing in submarkets 2 and 6 will decrease by a total of 8% in three years (2014). Submarket 2: 21% Submarket 6: 17%	As of FY 2015, the percentage of households residing in submarkets 2 and 6 are: Submarket 2: 22% (3% decrease) Submarket 6: 15% (6% decrease)	HACSB has not met the benchmark established for 2015. However, submarket 6 has achieved the benchmark and submarket 2 is within 1% of reaching the benchmark. Additionally, the actual combined decrease of 9% exceeds the expected combined decrease of 8%.

## 2. Challenges and Strategy Revisions

None.

## 3. Measurement Revisions

Standard metrics CE #1 and CE #2 were added in HACSB's 2015 Annual Plan per HUD's request. The objective of the activity is to increase housing choices for low-income families, and has resulted in some additional staff time spent to establish and apply the local payment standards. As a result, HACSB does not anticipate that these metrics will reflect a decrease in agency cost savings or staff time savings as a direct result of this activity.

The previously reported metric (HC #5: Increase in Resident Mobility) has been corrected per HUD's comments during the approval process for HACSB's 2015 Annual MTW Plan. The data previously reported using HC #5 will now be reported using the local metric "Households Able to Move from Areas of Poverty and/or Minority Concentration" listed above. HC #5 reflects the number of households residing in Local Payment Standard (LPS) Submarket 8 in FY 2015. The LPS for Submarket 8 exceeds 110% of the HUD-Published Fair Market Rent (FMR); therefore, households residing in this Submarket would not be able to lease a unit in the Submarket without the Local Payment Standard Activity.

As of the time of this report, pre-implementation baseline data for standard metrics CE #1, CE #2, and the first two local metrics is unavailable. In accordance with written instruction from HUD, data from the current report year has been used to establish the baseline for these metrics.

The local metric "Average HAP Cost" has also been added to capture information about potential HAP savings related to this activity.

## 4. Changes to Data Collection Methodology

None.

## Activity 13: Local Inspection Policies

This activity was approved in our FY 2010 MTW Annual Plan and was implemented on May 1, 2011. A modification to expand biennial inspections to all MTW units was approved via our 2016 MTW Annual Plan and will be implemented in FY 2016 and FY 2017.

### 1. Activity Description and Outcomes

This activity allowed HACSB to develop and implement local inspection standards for the Housing Choice Voucher (HCV) program that have increased operational efficiencies and ensured better housing options for low-income families. A modification to this activity was approved via our FY 2015 MTW Annual Plan. Biennial inspections will be conducted for all units, and the property rating system currently used to determine the frequency of inspections for each unit will be eliminated. Assisted units that are currently inspected annually will be moved to a biennial inspection schedule, with 50% of those units to be inspected in FY 2016 and the remaining 50% to be inspected in FY 2017. No change was made to HACSB's enhanced local inspection standards.

In FY 2013, HACSB completely outsourced our HCV inspections. This change resulted in additional staff time and cost savings. We continue to perform quality checks of our portfolio for accuracy, inspection standards, and customer satisfaction. The percentage of inspections that have met our quality standards and qualified for biennial inspections has been well above the expected outcome. In FY 2015, HACSB met and exceeded our benchmark savings of \$128,159 by \$223,505. Additionally, the total staff time (including time spent by contracted inspectors) has decreased by over 91.5%, largely due to the outsourcing of inspections. We anticipate that the cost and time savings will continue in future years.

A modification to this activity was approved via our FY 2015 MTW Annual Plan. Biennial inspections will be conducted for all units. The property rating system currently used to determine the frequency of inspections for each unit will be eliminated. Assisted units that are currently inspected annually will be moved to a biennial inspection schedule, with 50% of those units to be inspected in FY 2016 and the remaining 50% to be inspected in FY 2017. No change was made to HACSB's enhanced local inspection standards.

<b>Activity 13: Local Inspection Policies</b> <b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total annual cost to conduct inspections	Total expenses for inspections is \$707,551	Total expenses for inspections is \$579,392 in two years	\$355,887 in FY 2015  Calculation of Cost: \$44,493 Staff cost, \$307,315 contract costs, \$4,079 postage	Yes, HACSB has met the benchmark and surpassed the cost savings expected.

<b>Activity 13: Local Inspection Policies</b> <b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total time to complete HQS inspections in staff hours.	Total amount of staff time to complete HQS inspections prior to implementation of the activity was 15,571 hours.  Staff Time Calculation: 1.3 hours per inspection X 11,978 inspections performed.	Expected amount of total staff time dedicated to the task after implementation of the activity is 12,282 hours.	1,309 hours in FY 2015	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 13: Local Inspection Policies</b> <b>CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in inspections.	Average error rate of inspections prior to implementation of the activity is 19% (4 errors in 21 files). (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The average error rate of inspections is not expected to change in future years. (Baseline data is post-implementation)	This value will be provided with the FY 2016 Report.	This value will be provided with the FY 2016 Report.

## 2. Challenges and Strategy Revisions

None.

## 3. Measurement Revisions

Standard Metric CE #3 reflects only HACSB staff time. In prior years, the total staff time also included time spent by contracted inspectors.

Standard metrics CE #2 and CE #3 were added in HACSB's 2015 Annual Plan per HUD's request. The objective of the activity is to achieve agency cost savings. As a result, HACSB does not anticipate that these metrics will reflect a decrease in error rates related to this task or an increase in staff time savings as a direct result of this activity.

As of the time of this report, pre-implementation baseline data for standard metric CE #3 is unavailable. In accordance with written instruction from HUD, data from the current report year has been used to establish the baseline for this metric.

The previously reported standard metric (HC #1: Additional Units of Housing Made Available) has been removed per HUD's comments during the approval process for HACSB's 2015 Annual MTW Plan. Although HACSB anticipated reporting the data previously reported using HC #1 through a local metric, we have been unable to extract the desired data and the local metric has been removed. The data may be reported in future reports.

## 4. Changes to Data Collection Methodology

None.

## Activity 14: Local Asset Management Program

### 1. Activity Description and Outcomes

The First Amendment to the Standard MTW agreement executed on May 21, 2009 allowed HACSB to design and implement a local asset management program. As per our FY 2012 MTW Annual Plan and in accordance with the federal Office of Management and Budget (OMB) Circular A-87, we elected to establish a cost allocation methodology to allocate direct and indirect costs and establish an indirect cost rate. Detailed information is provided in Appendix B.

### 2. Challenges and Strategy Revisions

None.

### 3. Measurement Revisions

None.

### 4. Changes to Data Collection Methodology

None.

## Activity 15: Pilot Work Requirement

This activity was approved in the FY 2010 MTW Annual Plan and was implemented on January 1, 2013, for the Maplewood Homes Public Housing community; it was implemented on August 1, 2010, for all inbound portability participants.

### 1. Activity Description and Outcomes

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

Phase 1: activities removing barriers to gainful employment

Phase 2: activities leading to gainful employment

Phase 3: employment

“Work” activities are defined as a resident’s participation in any of the three phases described below. Residents may participate in each of the phases for up to two (2) years, after which they are required to meet the requirements of the next phase.

For inbound portability participants, all eligible household members (non-elderly and non-disabled) of the incoming portability family must be employed at least 15 hours per week within our County or within a reasonable driving distance prior to the execution of the HAP contract and throughout their participation in our program. Non-compliant families will have their previous employment income imputed until new employment is obtained. This requirement ensures that families make educated decisions prior to their move to San Bernardino and encourages them to continue on their path to economic independence.

In 2013 HACSB partnered with the County Workforce Development Department (WDD) to employ an onsite Workforce Development Specialist (WDS) at the Maplewood Homes Public Housing community once per week, and the partnership was expanded in FY 2015 to provide WDS services onsite for a minimum of three days per week. The WDS works directly with families in the Pilot Work Requirement program to help them prepare for and obtain employment. As of September 2015, 25 individuals had successfully found employment with assistance from the WDS. In addition, HACSB employs an onsite full time Resident Services Coordinator to work directly with families to help them achieve compliance with the requirements of this activity.

Since 2014 HACSB shared data for our mutual customers with the County Transitional Assistance Department (TAD) through a Memorandum of Understanding (MoU). Through the data share, HACSB and TAD are able to identify mutual customers that are currently out of compliance with TANF requirements and whose benefits are sanctioned. Both agencies then conduct outreach to the participants to identify barriers and possible solutions to achieve compliance. **The partnership has been expanded to include on-site services from TAD staff in FY 2016. An Eligibility Worker and an Employment Services Specialist are each on-site one day per week to work directly with PWR families.** We believe that this partnership is beneficial to both agencies and to our mutual customers. Achieving compliance with TANF requirements also satisfies the requirements of

HACSB’s Pilot Work Requirement activity. Additionally, compliant families are eligible for services through TAD, such as educational assistance, transportation assistance, and paid childcare, that can help them on the path to economic independence.

In FY 2015 HACSB entered into a contract with Loma Linda University to perform a needs assessment and longitudinal study of families residing at Maplewood Homes. The focus of the assessment is to update the needs assessment performed in 2010 prior to implementation and on outcomes to date and into the future. The reports will help us to identify areas of success and challenge and enable us to adjust the activity and/or accompanying services to provide the greatest opportunity for success to families participating in this activity.

<b>Activity 15: Pilot Work Requirement SS #1: Increase in Household Income</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation.	Whether the outcome meets or exceeds the benchmark.
Dollars - average earned income of Maplewood Homes Pilot Work Requirement (PWR) households.	Average earned income of Maplewood Homes PWR households prior to implementation of the activity is \$12,934.	Expected average earned income of Maplewood Homes PWR households prior to implementation of the activity is \$13,349, a 5% increase by September 30, 2015.	Actual average earned income of Maplewood Homes PWR households in FY 2015 is \$15,414 (for those with earned income) and \$7,361 for all Maplewood Homes PWR households	Yes, the outcome meets and exceeds the benchmark for this metric.
Dollars - average earned income of port-in households.	Average earned income of new port-in households prior to implementation of this activity is \$1,513.	Expected average earned income of new port-in households is \$1,589, a 5% increase by September 30, 2015.	Actual average earned income of new port-in households in FY 2015 is \$4,032.	Yes, the outcome meets and exceeds the benchmark for this metric.

**Activity 15: Pilot Work Requirement**  
**SS #3: Increase in Positive Outcomes in Employment Status**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full-Time	Head(s) of households with FULL TIME EMPLOYMENT prior to implementation of the activity is 17.	Expected head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity is 27 by September 30, 2015.	Actual head(s) of households with FULL TIME EMPLOYMENT in FY 2015 is 27 (of 302).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able households with FULL TIME EMPLOYMENT prior to implementation of activity is 6.6% (17/259).	Expected percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity is 11% (27/282) by September 30, 2015.	Actual percentage of total work-able households with FULL TIME EMPLOYMENT in FY 2015 is 11.7% (27/230).	Yes, the outcome meets and exceeds the benchmark for this metric.

(2) Employed Part-Time	Head(s) of households with PART TIME EMPLOYMENT prior to implementation of the activity is 44.	Expected head(s) of households with PART TIME EMPLOYMENT after implementation of the activity is 54 by September 30, 2015.	Actual head(s) of households with PART TIME EMPLOYMENT in FY 2015 is 78 (of 302).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able households with PART TIME EMPLOYMENT prior to implementation of activity is 17% (44/259).	Expected percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity is 21% (54/282) by September 30, 2015.	Actual percentage of total work-able households with PART TIME EMPLOYMENT in FY 2015 is 32.2% (74/230).	Yes, the outcome meets and exceeds the benchmark for this metric.
(3) Enrolled in an Educational Program	Head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity is 2.	Expected head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 4 by September 30, 2015.	Actual head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM in FY 2015 is 8 (of 302).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity is 1% (2/259).	Expected percentage of total work-able households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 1.4% (4/282) by September 30, 2015.	Actual percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM in FY 2015 is 3.5% (8/230).	Yes, the outcome meets and exceeds the benchmark for this metric.

(4) Enrolled in Job Training Program	Head(s) of households ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity is 0.	Expected head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 2 by September 30, 2015.	Actual head(s) of households ENROLLED IN JOB TRAINING PROGRAM in FY 2015 is 11 (of 302).	Yes, the outcome meets the benchmark for this metric.
	Percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity is 0%.	Expected percentage of total work-able households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 1% (2/282) by September 30, 2015.	Actual percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM in FY 2015 is 4.8% (11/230).	Yes, the outcome meets the benchmark for this metric.
(5) Unemployed	Head(s) of households UNEMPLOYED prior to implementation of the activity is 198.	Expected head(s) of households UNEMPLOYED after implementation of the activity is 197.	Actual head(s) of households UNEMPLOYED in FY 2015 is 196 (of 302).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able UNEMPLOYED prior to implementation of activity is 76% (198/259).	Expected percentage of total work-able households UNEMPLOYED after implementation of the activity decreases by 6% (197/282) by September 30, 2015. (denominator increases due to increase in families leased, numerator decreases)	Actual percentage of total work-able UNEMPLOYED in FY 2015 is 55.7% (128/230).	Yes, the outcome meets and exceeds the benchmark for this metric.

(6) Other	Head(s) of households participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of the activity is 14.	Expected head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 16 by September 30, 2016.	Actual head(s) of households participating in OTHER activities, leading to positive outcomes in employment status in FY 2015 is 9 (of 302).	No, the benchmark has not yet been met. However, the time period to achieve the benchmark has not yet been reached.
	Percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of activity is 5.4% (14/259).	The percentage of total work-able households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is expected to increase by 10% by September 30, 2016.	Actual percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status in FY 2015 is 3.9% (9/230).	No, the benchmark has not yet been met. However, the time period to achieve the benchmark has not yet been reached.

<b>Activity 15: Pilot Work Requirement</b>				
<b>SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of Maplewood Homes households receiving TANF assistance.	Number of Maplewood Homes households receiving TANF assistance prior to implementation of the activity is 66	The expected number of Maplewood Homes households receiving TANF assistance after implementation of the activity is 59.	The number of PWR households receiving TANF in FY 2015 is 99.	No, the benchmark for this metric has not yet been met. However, the number of PWR families receiving TANF in FYE 2015 is 15.3% lower than the number of PWR families receiving TANF in FYE 2014.
Percentage of port-in households receiving TANF assistance.	Percentage of new port-in households receiving TANF assistance prior to implementation of the activity is 16.7% (5 of 30).	The expected percentage of new port-in households receiving TANF assistance after implementation of the activity is 25% or less.	The percentage of new port-in households receiving TANF in FY 2015 is 17.9% (22 of 123).	Yes, the outcome meets and exceeds the benchmark for this metric.

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

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self sufficiency services after implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Percentage of Maplewood Homes households receiving services aimed to increase self-sufficiency.	The number of Maplewood Homes households receiving services aimed to increase self-sufficiency prior to implementation of the activity is 26.	The expected number of households receiving services aimed to increase self-sufficiency after implementation of the activity is 100% of Maplewood Homes families within one year of implementation.	The actual number of Maplewood Homes households receiving services aimed to increase self-sufficiency in FY 2015 is 302, or 100% of Maplewood Homes households.	Yes, the outcome meets the benchmark for this metric.
Number of port-in households receiving services aimed to increase self-sufficiency.	The number of new port-in households receiving services aimed to increase self-sufficiency prior to implementation of the activity is 0.	The expected number of new port-in households receiving services aimed to increase self –sufficiency after implementation of the activity is 0.	The actual number of new port-in households receiving services aimed to increase self-sufficiency in FY 2015 is 0.	Yes, the outcome meets the benchmark for this metric.

<b>Activity 15: Pilot Work Requirement</b> <b>SS# 6: Reducing Per Unit Subsidy Costs for Participating Households</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average HAP for port-in families	Average HAP for port-in households at start of activity is \$726.25	Reduction of 15% in Average HAP for incoming portability families	Actual average HAP for port-in households in FY 2015 is \$645.93.	No, the benchmark has not yet been achieved. However, the current average HAP is within 4% of the benchmark goal.

<b>Activity 15: Pilot Work Requirement</b> <b>SS# 7: Increase in Tenant Rent Share</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
PHA rental revenue in dollars (increase).	PHA rental revenue prior to implementation of the activity (in dollars).	Expected PHA rental revenue after implementation of the activity (in dollars).	Actual PHA rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
PHA rental revenue in dollars due to increased rent amount from families' increased employment opportunities in the Maplewood Homes public housing community (increase).	Average tenant rent share for families residing at Maplewood Homes prior to implementation of the activity is \$194.	Increase of 2% per year in monthly household rent from year 2. \$198 in FY 2014. \$202 in FY 2015. \$206 in FY 2016. \$210 in FY 2017. \$214 in FY 2018.	Actual average PWR tenant rent share for FY 2015 is \$210, an increase of 8.2% over the baseline average tenant rent share.	Yes, the outcome meets and exceeds the benchmark for this metric.

**Activity 15: Pilot Work Requirement  
SS #8: Households Transitioned to Self-Sufficiency**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency (increase).  For this activity, HACSB defines self-sufficiency as "Voluntary termination of housing assistance and other forms of government assistance (TANF, CalWORKs, cash aid, etc.) due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to market-rate housing or homeownership'.	0 households transitioned to self-sufficiency prior to implementation of the activity.	Expected households transitioned to self-sufficiency after implementation of the activity is 8 by FY 2018 (number).	5 actual households transitioned to self-sufficiency in FY 2015. 5 cumulative through FY 2015.	No, the benchmark for this metric has not yet been achieved. However, the timeframe for reaching the benchmark has not yet been reached.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

Standard metrics SS #4 and SS #5 were added in HACSB's 2015 Annual Plan per HUD's request.

## **4. Changes to Data Collection Methodology**

None.

## Activity 17: Local Income Inclusions

This activity was approved in our FY 2011 MTW Annual Plan and implemented on May 1, 2011. This activity was modified through HACSB's FY 2015 MTW Plan.

### 1. Activity Description and Outcomes

This activity allows HACSB to modify the rent calculation to include or exclude certain income sources that are currently excluded or included, respectively, under regulation. The modifications to the rent calculation are:

- Foster care income is fully included;
- Sanctioned Temporary Assistance to Needy Families (TANF) income, whether due to non-compliance with self-sufficiency requirements, fraud or any other sanction reasons authorized by CALWORKS, except term limits, is fully included;
- Adoption assistance payment income is fully included (effective at each family's first biennial recertification effective on or after October 1, 2015);
- The earned income of full-time students other than the Head of Household, spouse, and co-head of household is fully excluded (effective at each family's first biennial recertification effective on or after October 1, 2015)

<i>Activity 17: Local Income Inclusions</i> <i>CE #5: Increase in Tenant Rent Share</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average tenant rent share in dollars for households with local income inclusions.	Average tenant rent share for households with local income inclusions prior to implementation of the activity is \$473. (FY 2015 data used to establish baseline as data pre-implementation is unavailable)	The average tenant rent share will increase by no more than \$247.	This value will be provided with the FY 2016 Report.	This value will be provided with the FY 2016 Report.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

The standard metric CE #5 was added in HACSB's 2015 Annual Plan per HUD comment. The previously reported standard metric (SS #6: Reducing Per Unit Subsidy Costs for Participating Households) has been removed per HUD's comments during the approval process for HACSB's 2015 Annual MTW Plan.

As of the time of this report, pre-implementation baseline data for standard metric CE #5 is unavailable. In accordance with written instruction from HUD, data from the current report year has been used to establish the baseline for this metric.

## **4. Changes to Data Collection Methodology**

None.

## Activity 18: Property Management Innovation

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

### 1. Activity Description and Outcomes

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

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

The activity has been progressing well. As reported via the metrics below, the activity has resulted in cost savings and administrative efficiencies gained from the streamlined grievance process as well as the reduction in arbitration and unit turnaround costs. This activity continues to prepare residents for private sector living when they matriculate through the program.

<b>Activity 18: Property Management Innovation CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost for arbitration services (decrease)	Cost of task prior to implementation of the activity is \$6,550.	Expected costs for arbitration services after implementation of the activity is \$0.	Actual arbitration services costs after implementation of the activity (in dollars) = \$0	Yes, the outcome meets the benchmark for this metric.
Average per unit contract vacancy turnaround expenses (decrease)	Cost of task prior to implementation of the activity is \$14 per unit month. (9/30/2011)	Expected average per unit contract vacancy turnaround expenses after implementation of the activity is \$11 per unit month.	Actual average per unit contract vacancy turnaround expenses in FY 2015 is \$10.61 per unit month.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 18: Property Management Innovation CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff hours to complete settlement conferences (formerly Grievance Processes).	Staff time spent on informal hearings in CY 2011 is 5.4 hours per hearing (76 hours total / 14 hearings).	Expected amount of staff time spent on informal hearings will decrease by 50%.	Staff time spent on settlement conferences is 2 hours per conference (66 hours total / 33 settlement conferences).	Yes, the outcome meets and exceeds the benchmark for this metric.

## **2. Challenges and Strategy Revisions**

None.

## **3. Measurement Revisions**

Standard metric CE #2 was added in HACSB's 2015 Annual Plan per HUD comment.

## **4. Changes to Data Collection Methodology**

None.

## Activity 19: Local FSS Program

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

### 1. Activity Description and Outcomes

HACSB has developed a pilot local FSS (Family Self-sufficiency) program to help families in their self-sufficiency efforts. Through our local FSS program, program participants are eligible to receive the balance of their escrow savings account at the end of their FSS contract only if they voluntarily terminate their assistance from the Housing Choice Voucher or Public Housing program due to self-sufficiency efforts.

In FY 2015 66 families were enrolled in the program under the guidelines of this activity and 104 were enrolled under the traditional FSS program guidelines as a control group to compare with our local program participants. We intend to follow both sets of families throughout their five-year term to identify which families have the greatest success in completing the FSS Contract of Participation.

<b>Activity 19: Local FSS Program</b> <b>SS #1: Increase in Household Income</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation.	Whether the outcome meets or exceeds the benchmark.
Average earned income of households participating in HACSB's FSS program.	The average earned income of households participating in HACSB's Local FSS program prior to implementation of this activity is \$0. (No families were participating in the Local FSS program prior to implementation)	The expected average earned income of households participating in HACSB's local FSS program is \$8,000 within two years of implementation.	The actual average earned income of households participating in HACSB's Local FSS program in FY 2015 is \$11,552.	Yes, the outcome meets and exceeds the benchmark for this metric.

**Activity 19: Local FSS Program**  
**SS #2: Increase in Household Savings**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average savings/escrow amount of households affected by this policy prior to implementation of the activity (in dollars). This number may be zero.	Expected average savings/escrow amount of households affected by this policy after implementation of the activity (in dollars).	Actual average savings/escrow amount of households affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average amount of FSS escrow of households participating in the Local FSS Program.	Average amount of FSS escrow of households participating in the Local FSS Program prior to implementation of this activity is \$0. (No families were participating in the Local FSS program prior to implementation)	Expected average escrow amount of households participating in the Local FSS Program after implementation of the activity is \$702.	Actual average amount of FSS escrow of households participating in the Local FSS Program in FY 2015 is \$1,677.	Yes, the outcome meets and exceeds the benchmark for this metric.

**Activity 19: Local FSS Program**  
**SS #3: Increase in Positive Outcomes in Employment Status**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full-Time	Head(s) of households with FULL TIME EMPLOYMENT prior to implementation of the activity is 0.	Expected head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity is 20.	Actual head(s) of households with FULL TIME EMPLOYMENT in FY 2015 is 18 (of 66), or 27.7%	No, the outcome does not meet the benchmark for this metric. However, the number of heads of household enrolled in our local FSS program has decreased, and the percentage of HOH's employed full-time has remained relatively stable.
	Percentage of total work-able households with FULL TIME EMPLOYMENT prior to implementation of activity is 0%.	Expected percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity is 10%.	Actual percentage of total work-able households with FULL TIME EMPLOYMENT in FY 2015 is 27.7% (17/63).	Yes, the outcome meets and exceeds the benchmark for this metric.

(2) Employed Part-Time	Head(s) of households with PART TIME EMPLOYMENT prior to implementation of the activity is 0.	Expected head(s) of households with PART TIME EMPLOYMENT after implementation of the activity is 22.	Actual head(s) of households with PART TIME EMPLOYMENT in FY 2015 is 24 (of 66).	No, the benchmark for this metric has not yet been achieved.
	Percentage of total work-able households with PART TIME EMPLOYMENT prior to implementation of activity is 0%.	Expected percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity is 11%.	Actual percentage of total work-able households with PART TIME EMPLOYMENT in FY2015 is 34.9 (22/63).	Yes, the outcome meets and exceeds the benchmark for this metric.
(3) Enrolled in an Educational Program	Head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity is 0.	Expected head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 9.	Actual head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM in FY 2015 is 8.	No, the outcome does not meet the benchmark for this metric.
	Percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity is 0%.	Expected percentage of total work-able households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 5%.	Actual percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM in FY2015 is 9.5% (6/63).	Yes, the outcome meets and exceeds the benchmark for this metric.

(4) Enrolled in Job Training Program	Head(s) of households ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity is 0.	Expected head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 3.	Actual head(s) of households ENROLLED IN JOB TRAINING PROGRAM in FY 2015 is 3 (of 66).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity is 0%.	Expected percentage of total work-able households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 4%.	Actual percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM in FY 2015 is 4.8% (3/63). %.	Yes, the outcome meets and exceeds the benchmark for this metric.
(5) Unemployed	Head(s) of households UNEMPLOYED prior to implementation of the activity is 0.	Expected head(s) of households UNEMPLOYED after implementation of the activity is 27.	Actual head(s) of households UNEMPLOYED in FY 2015 is 24 (of 66).	No, HACSB has not met the benchmark for this portion of this metric. However, the percentage of unemployed heads of household has decreased 5% since 2014.
	Percentage of total work-able UNEMPLOYED prior to implementation of activity is 0%.	Expected percentage of total work-able households UNEMPLOYED after implementation of the activity is 14% (percent).	Actual percentage of total work-able UNEMPLOYED in FY 2015 is 36.5% (23/63).	No, HACSB has not met the benchmark for this portion of this metric. However, the percentage of work-able unemployed households has decreased 4.5% since 2014.

(6) Other	Head(s) of households participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of the activity is 0.	Expected head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 17.	Actual head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity in FY 2015 is 18.	Yes, the outcome meets the benchmark for this metric.
	Percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of activity is 0.	Expected percentage of total work-able households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 9%.	Actual percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 29% (18/63).	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 19: Local FSS Program</b>				
<b>SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Percentage of households participating in HACSB's Local FSS program receiving TANF assistance.	The number of households participating in HACSB's Local FSS program receiving TANF assistance prior to implementation of the activity is 0.	The percentage of households participating in HACSB's Local FSS program and receiving TANF assistance is expected to be less than 50%.	The actual number of households participating in HACSB's Local FSS program receiving TANF in FY 2015 is 25, or 37.8% of all HACSB Local FSS households.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 19: Local FSS Program</b>				
<b>SS# 5: Households Assisted by Services that Increase Self Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self sufficiency services after implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase self-sufficiency	The number of households receiving self-sufficiency services via HACSB's Local FSS program prior to implementation of the activity is 0.	The number of households receiving self-sufficiency services through HACSB's Local FSS program after implementation of the activity is expected to be 125 by 2017	The actual number of households receiving self-sufficiency services through HACSB's Local FSS program in FY 2015 is 66.	No, the benchmark has not yet been achieved. The time period for achieving the benchmark for this activity has not yet been reached.

<b>Activity 19: Local FSS Program</b>				
<b>SS# 6: Reducing Per Unit Subsidy Costs for Participating Households</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average amount of HAP per household for households participating in HACSB's Local FSS program	The average HAP per HCV household participating in HACSB's Local FSS program prior to implementation of the local FSS program is \$0.	Expected average HAP per household participating in HACSB's Local FSS program after implementation of the activity is \$579.	The actual average HAP per household for households participating in HACSB's Local FSS program in FY 2015 is \$365.	Yes, the outcome meets and exceeds the benchmark for this activity.

<b>Activity 19: Local FSS Program</b> <b>SS# 7: Increase in Tenant Rent Share</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
PHA rental revenue in dollars (increase).	PHA rental revenue prior to implementation of the activity (in dollars).	Expected PHA rental revenue after implementation of the activity (in dollars).	Actual PHA rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average tenant rent share in dollars for households participating in HACSB's Local FSS program.	Average tenant rent share for households served by HACSB's Local FSS program prior to implementation of the activity was \$0.	Expected tenant rent share per household for households participating in HACSB's Local FSS program after implementation is \$443.	The actual average tenant rent share in dollars for households participating in HACSB's Local FSS program in FY 2015 is \$291.	No, the benchmark for this metric has not yet been achieved.

<b>Activity 19: Local FSS Program</b> <b>SS #8: Households Transitioned to Self-Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency. For this activity, HACSB defines self-sufficiency as "Voluntary termination of housing assistance and other forms of government assistance (TANF, CalWORKs, cash aid, etc.) due, but not limited to, an increase in income, education, savings and employment (attainment of and/or increased level) to market-rate housing or homeownership."	0 households transitioned to self-sufficiency prior to implementation of the activity.	Expected households transitioned to self-sufficiency under this activity is 1 per year in FY 2014 and beyond.	The number of actual households transitioned to self-sufficiency in FY 2015 is 0. The cumulative total is 1. 1 in FY 2014 0 in FY 2015	No, the outcome does not meet the benchmark for this metric in FY 2015. However, 22 Local FSS Families are receiving no other forms of government assistance.

## 2. Challenges and Strategy Revisions

None.

## 3. Measurement Revisions

Standard metrics SS #2, SS #4, SS #5, SS #6, and SS #7 were added in HACSB's 2015 Annual Plan per HUD comment. The baselines for all metrics are zero because no families were participating in HACSB's Local FSS Program prior to implementation.

## 4. Changes to Data Collection Methodology

None.

## Activity 20: Five Year Lease Assistance Program (formerly Term Limits)

This activity was approved in our FY 2011 Annual MTW Annual and was implemented on January 1, 2012. Our FY 2015 Annual MTW Plan modified the activity to include potential termination from the program for noncompliance with the household's Supportive Services Agreement. The activity was further modified by our FY 2016 MTW Plan.

### 1. Activity Description and Outcomes

Through this activity, new non-elderly and non-disabled households admitted to the Housing Choice Voucher program from HACSB's waiting list are provided with up to five years of housing assistance. During the term of assistance, the family's housing subsidy is set at 50% of the applicable payment standard for the unit selected by the family. In addition, HACSB provides supportive services to the family through its Community Development Initiatives (CDI) department and affiliate non-profit, Knowledge and Education for Your Success (KEYS). Services include:

- Needs assessment at intake to determine whether families have the prerequisite resources needed to be successful in this program:
  - Based upon the results of the assessment, each family is designated as Triage Step 1, 2, or 3:
    - Step 1 families have the greatest chance at success (limited barriers and meet prerequisite criteria)
    - Step 2 families are referred to HACSB's affiliate non-profit KEYS for coaching and/or external resource referral
    - Step 3 families are also referred to KEYS but require additional support from community referrals.
- Development of an individualized action plan for success
- Access to HACSB's on-site Workforce Development Specialist through contract with the County Workforce Development Department
- Access to other resources designed to provide the family with meaningful support and tools to enhance the family's chances for success

At the conclusion of five years of assistance, families are no longer eligible for the program and assistance will end.

The goal of the activity is to enable the families we serve to focus on self-sufficiency efforts while we assist them with their housing needs for a limited term.

Currently, 1,353 families participate in the Five Year Lease Assistance Program.

HACSB is working with Loma Linda University to conduct a longitudinal study which will monitor the families served through this activity, tracking their goals and accomplishments. The activity is now entering its fourth year. Although we do not expect that the ultimate goal of self-sufficiency for the families we serve will be realized until years four and five, our analysis of the activity since implementation have demonstrated positive outcomes, such as:

- The average earned income for families in the Five-Year Lease Assistance program has increased by 27.7%;
- Full-time and part-time employment among work-able heads of household have increased by 3% each;
- 126 individuals located employment with assistance from the WDS since April 1, 2013, with wages for FY 2015 placements ranging from \$11.78 to \$20.91 per hour.

We anticipate that these positive outcomes will continue as our partnerships with community resource providers expand and as families progress through their individual action plans. In FY 2013, we worked with the Workforce Investment Board (WIB) and placed a Workforce Development Specialist at our Housing Programs Office in San Bernardino and the Maplewood Homes Public Housing Community. The partnership was further expanded in FY 2015 to add two Workforce Development Specialists (WDS). The WDS team provides job training programs and 'leads' that will help our families secure employment and earn a 'living wage' moving them closer to economic independence. **Additionally, in FY 2015 we partnered with the San Bernardino County Transitional Assistance Department (TAD) to share data for our mutual customers. Through this data share, we are able to identify customers whose TAD assistance is sanctioned and those who are underutilizing the assistance available to them. Our teams conduct outreach to these customers to assist them with curing their sanction and accessing services. In FY 2016, a TAD Eligibility Worker and Employment Services Specialist will work on-site at our Maplewood Homes Affordable Housing Community for two days each, and participants of the Five-Year Lease Assistance Program will have access to their services.**

Together with Loma Linda University, we continue to develop this program. In FY 2015 the intake and assessment process was restructured to improve our ability to identify and serve individuals based upon their needs. Additionally, HACSB's FY 2016 MTW plan included the modifications described below to allow us to further tailor the services we provide to meet individual needs and ensure that all families have the opportunity to succeed.

This activity previously included a hardship exemption that allows families reaching the end of their five-year term of assistance to receive up to three additional months of assistance for specific reasons, such as if the family will complete an educational program within that extension. Through the 2015 Plan, HACSB replaced that hardship exemption with the following exemptions:

**Intake Hardship Exemption:**

**Eligibility:** Any family identified at intake as Extremely Low-Income (ELI) or Triage Step 3 will be eligible for a hardship exemption of no more than two years, approvable in six-month increments. Should the family's circumstances change during the exemption period (e.g., the family is no longer zero-income or is no longer triage level three), the hardship exemption period will end.

**Assistance Level:** During the intake hardship exemption period, the family's rent share will be 24% of gross annual income, or the minimum rent of \$125, whichever is greater. No allowances or deductions (e.g. utility allowance or dependent deduction) shall apply. At the end of such hardship exemption, the family's rent portion will be calculated using the standard calculation for the Five-Year Lease Assistance program for the remainder of the family's five-year term.

**Participation Requirement:** During the exemption period the family will be required to participate in supportive services as identified by HACSB's CDI department and/or KEYS affiliate non-profit. Failure to comply with such requirements will result in immediate termination of the hardship exemption and the family's rent portion will be calculated under the standard calculation for the Five-Year Lease Assistance program.

**Total Term:** The total term of assistance under the program, including any approved intake exemption period, shall not exceed five years.

**End of Term Hardship Exemption:**

**Eligibility:** A family may be granted an extension of assistance in order to allow the family to complete an educational, job training, or other approved self-sufficiency activity. The family must request the extension of assistance no less than three months prior to the end of the five-year term of assistance. Additionally, the family must have complied with all requirements of the program, including the Supportive Services Agreement, to be eligible for an extension of assistance.

Term of Extension: Any approved extension shall be granted in six-month increments, and shall not exceed two years.

**Total Term:** The total term of assistance under the program, including intake any hardship exemption and/or end of term hardship exemption, shall not exceed seven years.

<i>Activity 20: Five-Year Lease Assistance Program SS #1: Increase in Household Income</i>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation.	Whether the outcome meets or exceeds the benchmark.
Average earned income of families affected by this policy in the Five Year Lease Assistance Program.	Average earned income of families affected by this policy Year 1 of the activity was \$12,181.	Expected average earned income of affected families will increase by 45% by 9/30/2015 and 75% by 9/30/2018.	Actual average earned income of affected families in FY 2015 was \$15,554, representing a 27.7% increase over the baseline year.	No.

**Activity 20: Five-Year Lease Assistance Program**  
**SS #3: Increase in Positive Outcomes in Employment Status**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category: (1) Employed Full-Time	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
(2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full-Time	Head(s) of households with FULL TIME EMPLOYMENT prior to implementation of the activity is 219 in year 1 of this activity.	Expected head(s) of households with FULL TIME EMPLOYMENT after implementation of the activity is 271 by FY 2015.	Actual heads of households with FULL TIME EMPLOYMENT in FY 2015 is 478.	Yes, the outcome meets the benchmark for this activity.
	Percentage of total work-able households with FULL TIME EMPLOYMENT prior to implementation of the activity is 32% in year 1 of this activity.	Expected percentage of total work-able households with FULL TIME EMPLOYMENT after implementation of the activity is 39% by FY 2015.	Actual percentage of total work-able households with FULL TIME EMPLOYMENT in FY 2015 is 35% (478/1353).	No, the benchmark has not yet been reached. However, the outcome is within 4% of the goal.

(2) Employed Part-Time	Head(s) of households with PART TIME EMPLOYMENT prior to implementation of the activity is 164 in year 1 of this activity.	Expected head(s) of households with PART TIME EMPLOYMENT after implementation of the activity is 172 by FY 2015.	Actual head(s) of households with PART TIME EMPLOYMENT in FY 2015 is 372.	Yes, the outcome meets the benchmark for this activity.
	Percentage of total work-able households with PART TIME EMPLOYMENT prior to implementation of activity is 24% in year 1 of this activity.	Expected percentage of total work-able households with PART TIME EMPLOYMENT after implementation of the activity is 29% by FY 2015.	Actual percentage of total work-able households with PART TIME EMPLOYMENT in FY 2015 is 27% (372/1353).	No, the benchmark has not yet been reached. However, the outcome is within 2% of the goal.
(3) Enrolled in an Educational Program	Head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of the activity is 43 in year 1 of this activity.	Expected head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity is 100 by FY 2015.	Actual head(s) of households ENROLLED IN AN EDUCATIONAL PROGRAM in FY 2015 is 199.	Yes, the outcome meets the benchmark for this activity.
	Percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM prior to implementation of activity is 6% in year 1 of this activity.	Expected percentage of total work-able households ENROLLED IN AN EDUCATIONAL PROGRAM after implementation of the activity 14% by FY 2015.	Actual percentage of total work-able ENROLLED IN AN EDUCATIONAL PROGRAM in FY 2015 is 15% (199/1353).	Yes, the outcome meets the benchmark for this activity.
(4) Enrolled in Job Training Program	Head(s) of households ENROLLED IN JOB TRAINING PROGRAM prior to implementation of the activity is 30 in year 1 of this activity.	Expected head(s) of households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 50 by FY 2015.	Actual head(s) of households ENROLLED IN JOB TRAINING PROGRAM in FY 2015 is 32.	No, the benchmark has not yet been reached. However, the outcome is nearly double that of FY 2014.
	Percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM prior to implementation of activity is 4% in year 1 of this activity.	Expected percentage of total work-able households ENROLLED IN JOB TRAINING PROGRAM after implementation of the activity is 7% by FY 2015.	Actual percentage of total work-able ENROLLED IN JOB TRAINING PROGRAM in FY 2015 is 2% (32/1353).	No, the benchmark has not yet been reached.

(5) Unemployed	Head(s) of households UNEMPLOYED prior to implementation of the activity is 329 in year 1 of this activity.	Expected head(s) of households UNEMPLOYED after implementation of the activity is 270 by FY 2015.	Actual head(s) of households UNEMPLOYED in FY 2015 is 487.	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able UNEMPLOYED prior to implementation of activity is 47% in year 1 of this activity.	Expected percentage of total work-able households UNEMPLOYED after implementation of the activity is 39% or less by FY 2015.	Actual percentage of total work-able UNEMPLOYED in FY 2015 is 36% (487/1353).	Yes, the outcome meets and exceeds the benchmark for this metric.
(6) Other	Head(s) of households participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of the activity is 0 in year 1 of this activity.	Expected head(s) of households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 54 by FY 2015.	Actual head(s) of households participating in OTHER activities, leading to positive outcomes in employment status in FY 2015 is 48.	No, the benchmark has not yet been reached. Expected to reach benchmark by FY 2015.
	Percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status prior to implementation of activity is 0% in year 1 of this activity.	Expected percentage of total work-able households participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity is 8% by FY 2015.	Actual percentage of total work-able participating in OTHER activities, leading to positive outcomes in employment status after implementation of the activity in FY 2015 is 3.5% (48/1353).	No, the benchmark has not yet been reached. Expected to reach benchmark by FY 2015.

<b>Activity 20: Five-Year Lease Assistance Program</b> <b>SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Percentage of Five-Year Lease Assistance households receiving TANF assistance.	The number of Five-Year Lease Assistance households receiving TANF assistance in year 1 of the activity is 267.	The expected percentage of Five-Year Lease Assistance households receiving TANF is less than 50%.	Actual households receiving TANF after implementation of the activity in FY2015 is 36.6% (486/1327).	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 20: Five-Year Lease Assistance Program</b> <b>SS# 5: Households Assisted by Services that Increase Self Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self sufficiency services after implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase self-sufficiency (increase)	Households receiving self-sufficiency services in Year 1 of the activity is 695.	The expected number of households receiving services aimed to increase self-sufficiency after implementation of the activity is 100% of families participating in the Five-Year Lease Assistance Program.	Actual households receiving self-sufficiency services in FY 2015 is 100% (1,353 households).	Yes, the outcome meets the benchmark for this metric.

<b>Activity 20: Five-Year Lease Assistance Program SS #8: Households Transitioned to Self-Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number or percentage of households transitioned to self-sufficiency (increase).  For this activity, HACSB defines self-sufficiency as “ Termination of housing assistance and other forms of government assistance (TANF, CalWORKs, cash aid, etc.) due to an increase in income in attainment of and/or increased level in employment to transition to market-rate housing or homeownership in the 5 year program timeframe.”	Households transitioned to self-sufficiency prior to implementation of the activity is 0.	Expected households transitioned to self-sufficiency after implementation of the activity is 174 or 25% of participating families by September 30, 2017.	Actual households transitioned to self-sufficiency under this activity in FY 2015 is 6. The cumulative total is 6. (0 in FY 2014 6 in FY 2015)	No, the benchmark for this metric has not yet been achieved. Benchmark expected to be reached by FY 2017.

## 2. Challenges and Strategy Revisions

None.

**3. Measurement Revisions**

None.

**4. Changes to Data Collection Methodology**

None.

## Activity 22: Streamlined Lease Assistance Program

This activity was approved in our FY 2013 MTW Annual Plan and was implemented on February 1, 2015. The activity was modified in our FY 2016 MTW plan, and the modifications are planned to be implemented in 2016.

### 1. Activity Description and Outcomes

Through this activity, HACSB has implemented an alternative subsidy/rent schedule for households participating in the Housing Choice Voucher and Public Housing programs. The activity applies to:

- Public Housing: all current and new households;
- Housing Choice Voucher: all new elderly/disabled households AND existing households not currently in the five-year lease assistance program

The rent for families in the Streamlined Lease Assistance program is calculated based on a percentage of gross annual income. The rent percentage was established by taking into account deductions and allowances permitted under traditional program regulations, and therefore no deductions or allowances are applied to the rent amount calculated under Streamlined Lease Assistance. Households participate in either fixed assistance or tiered assistance, based upon family type. Elderly and disabled households participate in a fixed assistance program, while non-elderly and non-disabled households participate in a tiered assistance program.

#### **Fixed Assistance Program for Elderly/Disabled Households:**

The family's rent share (TTP) for elderly and disabled households is 24% of their gross income toward rent for the duration of assistance.

#### **Tiered Assistance Program for Non-Elderly/Non-Disabled Households:**

The family's rent share (TTP) for non-elderly and non-disabled households begins at 21% of gross income and increases by 3% at each subsequent biennial recertification to a maximum of 30% of gross income.

A minimum rent of \$150 applies for both Fixed and Tiered assistance. Additionally, a baseline rent for the family is established at each biennial recertification, and future rent amounts may never fall below the baseline rent. If the calculated rent amount exceeds the ceiling rent for Public Housing or the contract rent for Housing Choice Voucher families, the lesser of the calculated TTP or rent amount is applied as the family's rent share.

The goals of this activity are:

- **Help Families Achieve Economic Independence**
  - Easier to understand and budget for rent costs
  - Families retain income increases between recertifications
  - For non-elderly/non-disabled families, tiered rent will help gradually prepare for renting without assistance

- **Administrative Efficiencies**
  - Reduce the number of interim recertifications
  - Simplify the rent calculation process

This activity was implemented on February 1, 2015, following extensive outreach efforts to educate the families we serve, industry partners, and all HACSB staff about the upcoming program changes. The activity required substantial modifications to our software systems, and those modifications were completed in early 2015 in time for the implementation. Specialized training was conducted for those staff directly involved with the recertification process. A new Fact Sheet was developed, information was shared with HACSB's Resident Advisory Board, and HACSB developed an informational video about the activity. The video is aired in the lobby of HACSB's main program office and was emailed directly to partners and other stakeholders. Additionally, HACSB reviewed the activity with representatives from the HUD Los Angeles field office via conference call, and 18 housing authorities attended a separate conference call hosted by HACSB to provide information about the program and how it would affect portability customers.

At the time of this writing, more than 4,000 households are participating in the Streamlined Lease Assistance program. 39 implementation hardship exemptions have been approved for households for whom the transition to Streamlined Lease Assistance would have caused a substantial increase in the family's share of rent.

The rent structures for this activity were developed based upon our analysis of rents for currently assisted families, and were designed to result in a zero net change to the rents paid by all families.

HACSB has modified this activity to add a third assistance type: Streamlined Fixed Lease Assistance for New Non-Elderly/Non-Disabled Households. This assistance type applies to only new non-elderly and non-disabled households in the Public Housing and Project-Based Voucher programs. New non-elderly and non-disabled households in the Housing Choice Voucher Program will continue to be assigned to HACSB's Five-Year Lease Assistance Program. The family rent share (TTP) for families receiving Streamlined Fixed Lease Assistance for New Non-Elderly/Non-Disabled Households will be set at 30% of gross income for the duration of assistance. The modification is planned to be implemented in FY 2016.

**Activity 22: Streamlined Lease Assistance Program  
CE #1: Agency Cost Savings**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of recertifications.	<p>Total cost of recertifications prior to implementation of this activity is \$176,524 in FY 2014</p> <p>\$165,492 staff cost + \$11,032 postage cost</p> <p>Staff Cost Calculation: 4,943 hours X \$33.48 per hour</p>	\$158,872 in FY 2016 and beyond.	<p>\$315,339 in FY 2015.</p> <p>\$302,291 staff cost + \$13,048 postage cost</p> <p>Staff Cost Calculation: 9,029 hours X \$33.48 per hour</p>	No, the outcome does not meet the benchmark for this activity in FY 2015. The benchmark is expected to be reached in FY 2016.

**Activity 22: Streamlined Lease Assistance Program  
CE #2: Staff Time Savings**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total time to complete recertifications in staff hours.	Total amount of staff time dedicated to recertifications prior to implementation of the activity is 4,943 hours in FY 2014  Staff Time Calculation: 4,413 recertifications performed in PH and HCV programs X 1.12 hours per recertification	4,449 hours in FY 2016 and beyond.	9,029 hours in FY 2015.  Staff Time Calculation: 5,219 recertifications performed in PH and HCV programs X 1.73 hours per recertification	No, the outcome does not meet the benchmark for this activity in FY 2015. The benchmark is expected to be reached in FY 2016.

<b>Activity 22: Streamlined Lease Assistance Program CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in completing recertifications as a percentage	Average error rate of recertifications prior to implementation of the activity is 11%. Data from FY 2014 was used to determine the baseline percentage.	The average error rate of recertifications is not expected to change as a result of this activity.	The actual average error rate of recertifications in FY 2015 is 6%.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 22: Streamlined Lease Assistance Program SS #1: Increase in Household Income</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation.	Whether the outcome meets or exceeds the benchmark.
Average earned income of households affected by this policy in dollars.	Average earned income of households affected by this policy prior to implementation of the activity is \$4,454.	The expected average earned income of SLA households is not expected to change in years 1 and 2 (FY 2015 and FY 2016) after implementation of the activity. The average earned income for SLA households is expected to increase by 3% in FY 2018, FY 2020, and FY 2022.	The actual average earned income of Streamlined Lease Assistance households in FY 2015 is \$5,884.	Yes, the outcome meets and exceeds the benchmark for this metric.

**Activity 22: Streamlined Lease Assistance Program**  
**SS #3: Increase in Positive Outcomes in Employment Status**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category: (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full-Time	Head(s) of households employed full-time prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the employment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.  We are able to report the following baseline and FY 2015 employment data:  Potential future SLA heads of household employed prior to implementation (FY 2014): 1,954 of 9,057 (21.6%)		
	Percentage of total work-able households employed full-time prior to implementation of the activity is unknown.			
(2) Employed Part-Time	Head(s) of households employed part-time prior to implementation of the activity is unknown.	SLA heads of household employed in FY 2015: 1,034 of 4,002 (25.8%)  Percentage of potential future SLA work-able heads of household employed prior to implementation (FY 2014): 40% (1,770 of 4,425)		
	Percentage of total work-able households employed part-time prior to implementation of the activity is unknown.			

(3) Enrolled in an Educational Program	Head(s) of households enrolled in an educational program prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the educational program enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.		
	Percentage of total work-able households enrolled in an educational program prior to implementation of the activity is unknown.			
(4) Enrolled in Job Training Program	Head(s) of households enrolled in a job training program prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the educational program enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.		
	Percentage of total work-able households enrolled in a job training program prior to implementation of the activity is unknown.			
(5) Unemployed	Potential future SLA head(s) of households unemployed prior to implementation of the activity in FY 2014 is 7103 of 9057 (78.4%)	The number of unemployed SLA heads of household is not expected to change as a result of this activity.	Head(s) of households unemployed in FY 2015 is 2,968 of 4,002 (74.2%)	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of potential future SLA total work-able households unemployed prior to implementation of the activity in FY 2014 is 60% (2655 of 4425)	The percentage of unemployed work-able SLA households is not expected to change as a result of this activity.	Percentage of total work-able households unemployed in FY 2015 is 52% (941 of 1,811)	Yes, the outcome meets and exceeds the benchmark for this metric

(6) Other	Head(s) of households engaged in other activities prior to implementation of the activity is unknown.	HACSB does not currently collect or maintain detailed information about the educational program enrollment status of all participants, but we are working to develop a method for doing so in order to be able to report this data in future years.
	Percentage of total work-able households engaged in other activities prior to implementation of the activity is unknown.	

<b>Activity 22: Streamlined Lease Assistance Program</b>				
<b>SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of Streamlined Lease Assistance households receiving TANF assistance.	Households that would convert to Streamlined Lease Assistance in year 1 and were receiving TANF prior to implementation of the activity is 2,377 out of 9,055 households (26.3%).	The number of SLA households receiving TANF is not expected to change as a result of this activity.	Streamlined Lease Assistance Households receiving TANF in FY 2015 is 1,003 out of 3,991 current Streamlined Lease Assistance households (25.1%).	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 22: Streamlined Lease Assistance Program</b> <b>SS# 6: Reducing Per Unit Subsidy Costs for Participating Households</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars.	Average HAP subsidy per household affected by this policy prior to implementation of the activity is \$575.	The average HAP subsidy for SLA households is not expected to decrease in years 1 and 2 (FY 2015 and FY 2016) after implementation of the activity. The average HAP subsidy for SLA households is expected to decrease by 3% in FY 2018, FY 2020, and FY 2022.	Average HAP subsidy per Streamlined Lease Assistance household in FYE 2015 is \$574.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 22: Streamlined Lease Assistance Program</b> <b>SS# 7: Increase in Tenant Rent Share</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
PHA rental revenue in dollars (increase).	PHA rental revenue prior to implementation of the activity (in dollars).	Expected PHA rental revenue after implementation of the activity (in dollars).	Actual PHA rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average tenant rent share of Streamlined Lease Assistance households.	Average tenant rent share prior to implementation of the activity for households eligible for Streamlined Lease Assistance is \$270.	The average tenant rent share for SLA households is not expected to change as a result of this activity.	Average tenant rent share of Streamlined Lease Assistance households in FY 2015 is \$323.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 22: Streamlined Lease Assistance Program SS #8: Households Transitioned to Self-Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of Streamlined Lease Assistance (SLA) households transitioned to self sufficiency (increase). For purposes of this activity, "self-sufficiency" is defined as having a total gross household income at or above 80% of the Area Median Income for the family size (at time of end of participation).	Number of SLA households transitioned to self-sufficiency prior to implementation of the activity in FY 2014 is 37.	Expected number of SLA households transitioned to self-sufficiency as a result of the SLA activity is 0.	Actual number of SLA households transitioned to self-sufficiency in FY 2015 is 11.	Yes, the outcome meets and exceeds the benchmark for this metric.

## 2. Challenges and Strategy Revisions

None.

## 3. Measurement Revisions

Standard metrics SS #3, SS #4, SS #7, and SS #8 were added in HACSB's 2015 Annual Plan per HUD comment. The objective of the activity is to achieve agency cost and staff time savings. As a result, HACSB does not anticipate that these metrics will reflect an increase in positive outcomes in employment status, households removed from TANF, increase in tenant rent share, or households transitioned to self-sufficiency as a direct result of this activity.

As of the time of this report, we are unable to report fully on Standard Metric SS #3, which was added through HACSB's 2015 MTW Annual Plan and not approved by HUD until February 13, 2015, well into HACSB's fiscal year. HACSB does not currently collect or maintain detailed information about the employment status, education enrollment status, job training enrollment status, or other activity of all participants, but we are working to develop a method for doing so in order to be able to report this data for Standard Metric SS #3 in future years.

#### **4. Changes to Data Collection Methodology**

None.

## Activity 23: No Child Left Unsheltered

### 1. Activity Description and Outcomes

This activity was proposed and approved via HACSB's FY 2014 Annual MTW Plan and implemented on April 1, 2015.

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

In March 2015, the HACSB Housing Commission and Board of Governors approved the award of the 40 project-based voucher units reserved for this activity to units within the HACSB-owned and HACSB-affiliated non-profit housing stock. HACSB is authorized to award these contracts through a non-competitive process under its Local Project-Based Voucher MTW Activity (activity 11), approved by HUD through HACSB's 2009 Annual MTW Plan. These 40 housing choice vouchers will be made available to eligible families meeting the criteria under this program. Families housed through this activity typically have significant challenges in locating housing through the traditional tenant-based voucher program. In this program, HACSB, as the property owner, has the ability to house the families much more quickly and with more flexibility than in the traditional tenant-based voucher program, thus reducing the wait for housing from upwards of 60 days to only a few days within this non-traditional program. The rental subsidy is determined based on the same methodology used in the Streamlined Lease Assistance program. HACSB has partnered with a variety of local community service providers, including the school system, to identify families, particularly those with school-age children, who are unsheltered. Each identified family will be encouraged to apply for assistance, and if eligible, will receive assistance after being selected from the targeted waiting list.

HACSB selected the locations of the 40 project-based voucher units using data from the most recent homeless point-in-time survey. The units will be distributed throughout the county as listed in the following table:

Property Owner	Number of Units	Communities
HACSB	26	Kingsley Patio Homes, Montclair Stone Creek Apartments, Loma Linda Sunset Gardens, Yucaipa Hampton Court Apartments, Redlands Andalusia, Victorville Mesa Gardens, Hesperia
HPI Property Acquisitions LLC	10	Kendall Drive Apartments, San Bernardino Kendall Park Apartments, San Bernardino
Summit Place LLC	4	Summit Place, Ontario

<b>Activity 23: No Child Left Unsheltered</b> <b>CE #4: Increase in Resources Leveraged</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).	Actual amount leveraged after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Amount of funds leveraged in dollars.	Amount of funds leveraged prior to implementation of the activity is \$0.00.	The expected amount of funds leveraged after implementation of the activity is \$35,000.	The actual amount of funds leveraged is \$35,483 in FY 2015.	Yes, the outcome meets and exceeds the benchmark for this metric.

<b>Activity 23: No Child Left Unsheltered SS #8: Households Transitioned to Self-Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency. For purposes of this activity, "self-sufficiency" is defined as having a total gross household income at or above 80% of the Area Median Income for the family size.	The number of households transitioned to self-sufficiency prior to implementation of the activity is 0.	The expected number of households transitioned to self-sufficiency after implementation of the activity is 0.	The actual number of households transitioned to self-sufficiency in FY 2015 is 0.	Yes, the outcome meets the benchmark for this metric.

<b>Activity 23: No Child Left Unsheltered HC #3: Decrease in Wait List Time</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average applicant time on wait list in months (decrease).	Average applicant time on wait list prior to implementation of the activity (in months).	Expected average applicant time on wait list after implementation of the activity (in months).	Actual average applicant time on wait list after implementation of the activity (in months).	Whether the outcome meets or exceeds the benchmark.
Average applicant time on wait list in months.	Average applicant time on wait list prior to implementation of the activity is unknown.	This value will be provided with HACSB's FY 2016 MTW Report.	This value will be provided with HACSB's FY 2016 MTW Report.	This value will be provided with HACSB's FY 2016 MTW Report.

<b>Activity 23: No Child Left Unsheltered</b> <b>HC #7: Households Assisted by Services that Increase Housing Choice</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity (number). This number may be zero.	Expected number of households receiving these services after implementation of the activity (number).	Actual number of households receiving these services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase housing choice.	Number of households receiving services aimed to increase housing choice prior to implementation of this activity is 0.	The expected number of households receiving services aimed to increase housing choice after implementation of this activity is 5 per year.	6 NCLU households received services aimed to increase housing choice in FY 2015 (100% of NCLU households).	Yes, the outcome meets the benchmark for this metric.

<b>Activity 23: No Child Left Unsheltered</b> <b>Local Metric: Households Housed through This Activity</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households housed through the No Child Left Unsheltered activity.	The number of households housed through the No Child Left Unsheltered activity prior to implementation of the activity is 0.	The expected number of households housed through this activity is 5 per year.	6 households were housed through this activity in FY 2015.	Yes, the outcome meets the benchmark for this local metric.

## 2. Challenges and Strategy Revisions

None.

### **3. Measurement Revisions**

Standard metrics CE #4, SS #8, HC #3, and HC #7 were added in HACSB's 2015 Annual Plan per HUD's request. As of the time of this report, baseline and current data for standard metric HC #3 is unavailable. This metric was added through HACSB's 2015 MTW Annual Plan and not approved by HUD until February 13, 2015, well into HACSB's fiscal year. HACSB does not currently have methodology for identifying average wait list time, but we are working to develop a method for doing so in order to be able to report this data for this metric in future years.

### **4. Changes to Data Collection Methodology**

None.

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

This activity was submitted and approved via our FY2014 MTW Annual Plan. It was implemented on April 1, 2015, and modified via our FY 2015 MTW Plan to exclude current participants of our Family Self-Sufficiency program.

### 1. Activity Description and Outcomes

In an effort to create more housing opportunities for families on our Public Housing and Housing Choice Voucher waiting lists, and in recognition of certain families attaining self-sufficiency, HACSB has implemented this activity to transition families who have an annual income which exceeds 80% of area median income (“over-income”) off of housing assistance. This activity applies to the Public Housing program, Tenant-Based Voucher program, and Housing Choice Voucher program.

Through this activity, over-income families will be given a six month transition period. . After the six month transition period, families will transition to receiving no housing assistance from HACSB. Public Housing and Project-Based Voucher families will be required to move and HCV families will have the option of remaining with their current landlord with no assistance or locating alternate housing.

Elderly, disabled and homeownership families are exempt from this activity. The transition period begins for existing families identified as over-income on April 1, 2015, and at interim or recertification for families that become over-income after April 1, 2015.

If, during the six-month transition period, an over-income family’s income falls below 80% of the AMI, then the family will no longer be considered over-income and will not transition off of the program.

Families in the six-month transition period may also qualify for a hardship exemption from this activity for no-fault loss of income and/or death of a family member with income if the change in income results in the family’s income falling below 80% of AMI. If a hardship exemption is approved for such situations, the family will be removed from the six-month transition period and will not transition off the program.

This activity was implemented effective April 1, 2015. The six-month transition period began for 89 currently-assisted households identified as “over-income” on April 1, 2015, and will begin at biennial or interim recertification for any household identified as over-income after that date.

**Activity 24: Transition for Over-Income Public Housing/Housing Choice Voucher Families  
SS #8: Households Transitioned to Self-Sufficiency**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households transitioned to self-sufficiency through the Over-Income activity. For purposes of this activity, "self-sufficiency" is defined as having a total gross household income at or above 80% of the Area Median Income for the family size.	The number of households transitioned to self-sufficiency through the over-income activity prior to implementation of the activity is 0.	The expected number of households transitioned to self-sufficiency after implementation of the activity is 4 per year.	The actual number of households transitioned to self-sufficiency through the over-income activity in FY 2015 is 39. (31 voucher and 8 affordable housing).	Yes, the outcome meets the benchmark for this metric.

**2. Challenges and Strategy Revisions**

None.

**3. Measurement Revisions**

None.

**4. Changes to Data Collection Methodology**

None.

## **B. Not Yet Implemented Activities**

### **Activity 25: Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing**

#### **A. Description of Proposed MTW Activity**

This activity will allow HACSB to apply an amended definition of elderly for the project-based vouchers at the Horizons at Yucaipa Affordable Senior Housing development. This flexibility is needed in order to meet both the City of Yucaipa's requirements for affordable senior housing as well as the age requirement for the special needs population to be served by units financed under the Mental Health Stabilization Act (MHSA). For purposes of this property, there shall be two definitions of an elderly (senior) individual.

The Horizons at Yucaipa Affordable Senior Housing development is a two-phase, 77-unit new construction development in the City of Yucaipa. Phase I of the development is 50 units on approximately 4.2 acres of vacant land, and will include 49 Project-Based Vouchers and one manager's unit. Phase II will include 27 units and will also be developed for seniors at least 55 years of age. The Phase II building will incorporate into the Phase I building so amenities can be shared and costs reduced. The development will be 100% affordable housing financed through a combination of the following funding sources:

- 4% Low Income Housing Tax Credits
- Tax Exempt Bond funding
- County HOME
- County Mental Health Services Act funding (MHSA)
- Fee deferrals from the City of Yucaipa
- Permanent debt

Phase I will contain 38 (1) bedroom units of approximately 692 sq. ft. per unit and 12 (2) bedroom units of approximately 967 sq. ft. per unit. The 50 units will be within one two-story building and contain two elevators. 10 of the 50 units in Phase I will be reserved as MHSA units and carry an age restriction of 60 years old. The property will operate as affordable housing for seniors. For the 10 MHSA units, an elderly (senior) individual shall be defined as one who is 60 years of age or older in order to meet the MHSA requirements. For the remaining PBV units, an elderly (senior) individual shall be defined as one who is 55 years of age or older in order to meet the City of Yucaipa's senior housing requirements.

#### **B. Action Toward Implementation**

In 2015 HPI broke ground on the Horizons at Yucaipa development, a new construction affordable senior project that will be completed in the fall of 2016. Construction is scheduled for 18 months and is anticipated to be completed in January 2017. Marketing for the project will begin in October 2016 to develop a site based waiting list and to pre-qualify interested tenants. Lease up and stabilization will occur between January – March of 2017.

## C. Activities on Hold

### Activity 3: Alternate Assessment Programs

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

#### 1. Activity Description

This activity was approved through HACSB's FY2009 MTW Annual Plan and has not yet been implemented. The activity was placed on hold via HACSB's FY2010 MTW Annual Plan.

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

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

#### 2. Reason(s) for On-Hold Status

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

#### 3. Plan for Reactivation

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

#### 4. Reimplementation Timeline

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

#### 5. Non-Significant Changes or Modifications

No modifications are proposed for this activity.

## **D. Closed Out Activities**

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

#### **1. Approval and Implementation Years**

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

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

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

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

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

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

#### **1. Approval and Implementation Years**

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

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

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

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

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

This activity was never implemented.

# Section V: Sources and Uses of MTW Funds

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

### *Actual Sources of MTW Funding for the Fiscal Year*

<b>Annual MTW Report</b>
<b>V.3.Report.Sources and Uses of MTW Funds</b>
<b>A. MTW Report: Sources and Uses of MTW Funds</b>
<b>Actual Sources and Uses of MTW Funding for the Fiscal Year</b>
<b>PHAs shall submit their unaudited and audited information in the prescribed FDS format through the Financial Assessment System - PHA (FASPHA), or its successor system</b>
<b>Describe the Activities that Used Only MTW Single Fund Flexibility</b>
<b>HACSB's Local FSS Activity is funded using single-fund flexibility with savings achieved through other MTW activities. HACSB's Community Development Initiatives (CDI) department and its services, which are not a separate MTW activity, and HACSB's conversion of Public Housing units under the Rental Assistance Demonstration (RAD) are also funded using single-fund flexibility.</b>

## B. MTW Report: Local Asset Management Plan

V.4.Report.Local Asset Management Plan	
B. MTW Report: Local Asset Management Plan	
Has the PHA allocated costs within statute during the plan year?	<input type="checkbox"/> or <input checked="" type="checkbox"/> No
Has the PHA implemented a local asset management plan (LAMP)?	<input checked="" type="checkbox"/> Yes or <input type="checkbox"/>
If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and approved. It shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.	
Has the PHA provided a LAMP in the appendix?	<input checked="" type="checkbox"/> Yes or <input type="checkbox"/>
<b>An appendix has been including describing HACSB's Local Asset Management Program.</b>	

## C. MTW Report: Commitment of Unspent Funds

In accordance with the instructions provided for this section, MTW agencies are not required to complete this section until HUD issues a methodology for defining reserves, including a definition of obligations and commitments.

V.5.Report.Unspent MTW Funds			
C. MTW Report: Commitment of Unspent Funds			
In the table below, provide planned commitments or obligations of unspent MTW funds at the end of the PHA's fiscal year.			
Account	Planned Expenditure	Obligated Funds	Committed Funds
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
<b>Total Obligated or Committed Funds:</b>		<b>0</b>	<b>0</b>
<p>In the body of the Report, PHAs shall provide, in as much detail as possible, an explanation of plans for future uses of unspent funds, including what funds have been obligated or committed to specific projects.</p>			
<p><b>Note :</b> <i>Written notice of a definition of MTW reserves will be forthcoming. Until HUD issues a methodology for defining reserves, including a definition of obligations and commitments, MTW agencies are not required to complete this section.</i></p>			

# Section VI: Administrative

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## A. General Description of HUD Reviews, Audits, or Physical Inspection Issues (Deficiencies) That Require Agency Action

Over the past year, the U.S. Department of Housing and Urban Development's Office of Inspector General (the "OIG") has audited certain aspects of the Shelter Plus Care program that is administered, in part, by HACSB. That audit has focused on the eligibility of a very narrow group of program participants representing less than 5% of the total vouchers administered by HACSB across its programs. HACSB has fully cooperated with the OIG in the course of this targeted audit and final resolution is pending. HACSB fully expects that the final resolution will confirm its overall exemplary management of the Shelter Plus Care program.

## B. Results of PHA-Directed Evaluations

Five-Year Lease Assistance Program (Activity 20): HACSB has contracted with Loma Linda University to conduct a longitudinal study for the Five Year Lease Assistance Program (Activity 20). This study will follow families leased up in the program through their progress, tracking their goals and accomplishments. We will continue to develop this program based on the results of this study.

Pilot Work Requirement (Activity 15): In FY 2015 HACSB entered into another contract with Loma Linda University to conduct a longitudinal study for the Pilot Work Requirement (Activity 15). The study will use similar methods to follow the progress of families residing at Maplewood Homes Public Housing Community. The contract with Loma Linda University also includes an assessment of the needs and potential barriers to employment-related activities for individuals residing at Maplewood Homes, including, but not limited to, education, health and wellness, parenting and children, financial, family and social support, availability and use of resources. Information from the study will be used to continue development of the activity.

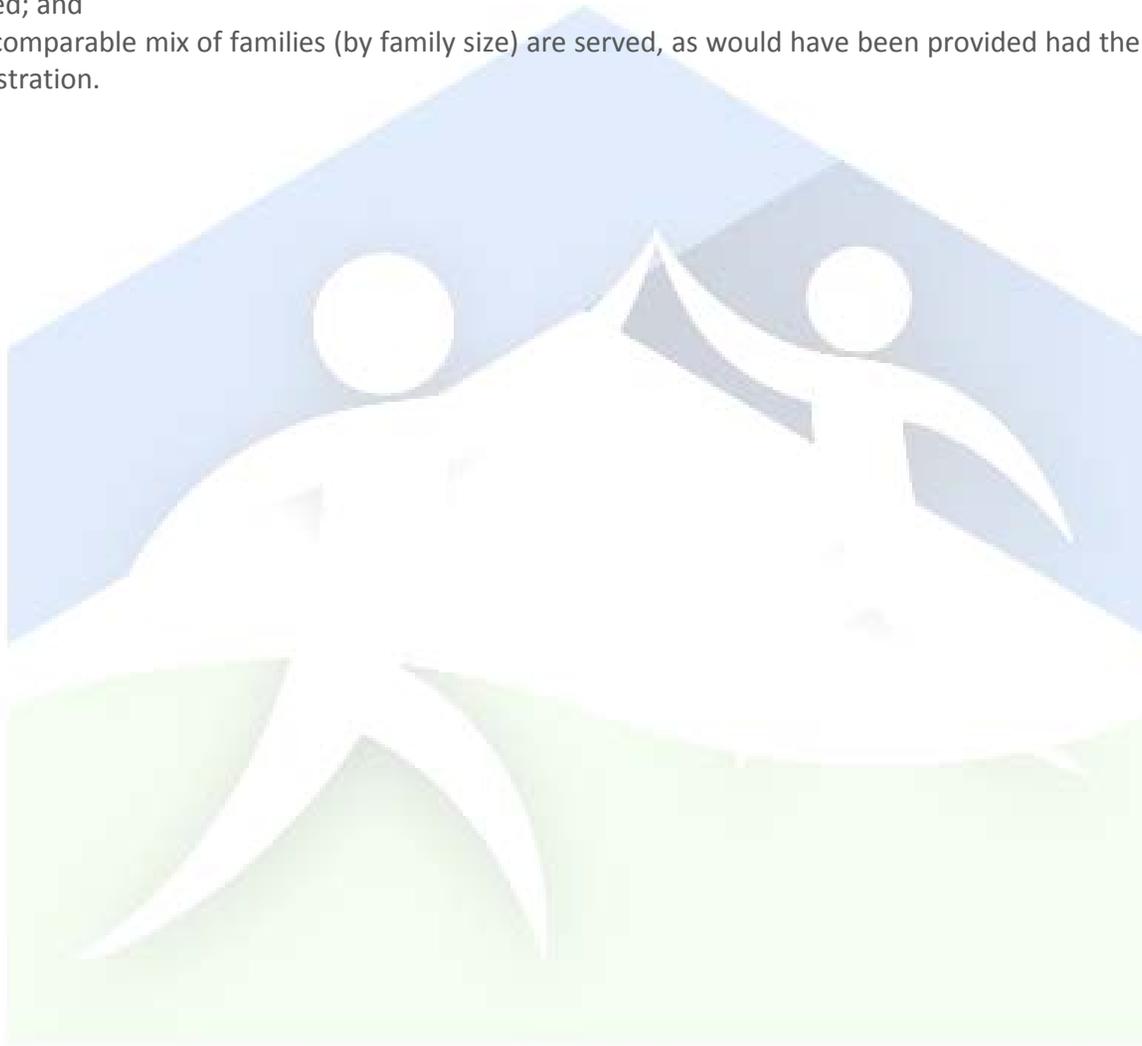
No Child Left Unsheltered (Activity 23): The 2015 contract with Loma Linda University also includes a longitudinal study to identify the effects of the NCLU Activity on participating families, with focus on family safety and stability, school attendance of children, employment, income, education advancement, self-sufficiency activities, financial choices, use of resources, and other effects on children.

## C. Statutory Requirements Certification

HACSB certifies that it has met the three statutory requirements of:

- 1) Assuring that at least 75 percent of the families assisted by the Agency are very low-income families;

- 2) Continuing to assist substantially the same total number of eligible low income families as would have been served had the amounts not been combined; and
- 3) Maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration.



# Appendix A: Local Asset Management Plan

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

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

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

**Community Affairs** – Our centralized community affairs department assists in making and strengthening partnerships throughout the County to leverage services and programs to assist our residents in achieving self-sufficiency. These partners include schools, non-profit community organizations, health and human service providers, financial institutions, elected officials, and so forth. Through these efforts, our housing sites are able to sustain services such as child care, financial literacy courses, health services, parenting courses, to name a few examples.

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

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

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

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

**Development** – Our centralized Office of Real Estate Development team is responsible for all Real Estate acquisition, rehabilitation, redevelopment and new construction projects. Our dedicated project managers often eliminate the costs associated with outside development and/or construction management consultants. The staff is continuously available to all AMPS as a technical, as well as planning and implementation resource for non-routine maintenance and emergency rehabilitation projects. The Department manages the completion of all

Physical Needs Assessments and due diligence reports for the entire portfolio of HACSB residential developments. This department also oversees all of the Capital Fund improvement and rehabilitation projects within the public housing portfolio and administers all grant funding and debt financing that can be associated. Lately, the development team has been actively involved in implementing energy efficiency projects and in 2010 was awarded a \$1.84 million grant at our Maplewood Homes Community (leverage funds for the CFRC grant). This project is currently under construction. Finally, Development administers a very successful homeownership program that has helped 135 families overcome their barriers and achieve the American dream of owning a home. It is a program utilizing a variety of methods to achieve goals for our clients, including Section 32 (converted public housing), Section 8 Homeownership, and a Community Land Trust.

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

### **Local Asset Management Implementation**

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

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

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

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

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

- Contract costs readily identifiable with delivering housing assistance to low-income families.
- Housing Assistance Payments, including utility allowances, for vouchers
- Utilities
- Insurance
- Property-based audits
- Staff training
- Interest expense
- Information technology fees
- Portability administrative fees
- Rental Assistance department costs for administering Housing Choice Vouchers including inspection activities
- Operating costs directly attributable to operating HACSB-owned properties
- Fleet management fees
- Maintenance services for unit or property repairs or maintenance
- Maintenance services include, but are not limited to, landscaping, pest control, decorating and unit turnover
- Community Services department costs directly attributable to tenants services
- Gap financing real estate transactions
- Acquisition costs
- Demolition, relocation and leasing incentive fees in repositioning HACSB-owned real estate
- Homeownership activities for low-income families

- Leasing incentive fees
- Certain legal expenses
- Professional services at or on behalf of properties or a portfolio, including security services
- Extraordinary site work
- Any other activities that can be readily identifiable with delivering housing assistance to low-income families
- Any cost identified for which a grant award is made. Such costs will be determined as HACSB receives grants

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

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

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

- Asset Management Fees
- Management Fees
- Bookkeeping Fees

- Indirect Services Fees

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

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

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

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

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

**Differences between HUD Asset Management and HACSB LAMP** - Under the First Amendment, HACSB is allowed to define costs differently than the standard definitions published in HUD’s Financial Management Guidebook pertaining to the implementation of 24 CFR 990. HACSB is required to describe in this MTW Annual Plan differences between our Local Asset Management Program and HUD’s asset management program. Below are the three key differences:

- HACSB determined to implement an indirect service fee that is much more comprehensive than HUD’s asset management system. HUD’s asset management system and fee for service is limited in focusing only on a fee for service at the Low Income Public Housing (LIPH) property level. HACSB’s LAMP is much broader and includes local housing and other activities not found in traditional HUD programs. HACSB’s LAMP addresses the entire HACSB operation.
- HUD’s rules are restrictive regarding cash flow between projects, programs, and business activities. HACSB intends to use its MTW

resources and regulatory flexibility to move its MTW funds and project cash flow among projects without limitation and to ensure that our operations best serve our mission, our LAMP cost objectives, and ultimately the low-income people we serve.

- HACSB charges an Asset Management Fee to all AMPS regardless of excess cash by each AMP by the use of our fungibility.

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



# Appendix B: Non-MTW Related Information

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## Special Purpose Programs –

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

-  **Mainstream** – This program is designed to provide rental assistance to persons with disabilities to enable them to lease affordable private housing of their choice. At the end of FY 2015, we were providing assistance to 98 families through this program.
-  **Housing Opportunities for Persons with AIDS (HOPWA)** - HACSB has partnered with Foothill Aids Project to offer rental assistance and supportive services to persons diagnosed with HIV/AIDS. The Foothill AIDS Project assesses the applicant’s duration of participation in their case management program and facilitates location of suitable housing to meet their clients’ needs. At the end of FY 2015, we were providing assistance to 37 families through this program.
-  **Veteran’s Affairs Supportive Housing (VASH)** - HACSB and Veterans Administration Medical Center have partnered to provide rental vouchers and supportive services to eligible homeless veterans with severe psychiatric or substance abuse disorders. The program goals include promoting maximal Veteran recovery and independence to sustain permanent housing in the community for the Veteran and the Veteran’s family. At the end of FY 2015, we were providing assistance to 232 families through this program.
-  **Master Leasing Program** – This program is funded by State of California Mental Health Services Act funds and serves mentally ill or developmentally disabled families with emergency shelter housing. Case management and comprehensive support services are provided for residents participating in this program. At the end of FY 2015, we were providing assistance to 20 families through this program.
-  **Shelter Plus Care Programs (S + C)** - The Shelter Plus Care Program provides rental assistance for hard-to-serve homeless persons with disabilities in connection with supportive services funded from sources outside the program. HACSB currently administers the following Shelter Plus Care vouchers:
  - **Stepping Stones (S + C)** - This program provides rental assistance for hard to serve homeless individuals and families with disabilities in connection with supportive services funded through the Department of Behavioral Health (DBH). Under this program, HACSB provides the housing services based on eligible referrals from DBH, which matches the housing funds by providing supportive services. At the end of FY 2015, we were providing assistance to 36 families through this program.

- ***New Horizons (S + C)*** – This program provides rental assistance for hard to serve persons with disabilities in connection with supportive services funded through the Department of Behavioral Health (DBH). This is an ongoing program, and all turnover vouchers focus on providing housing to chronically homeless households. Under this program, HACSB provides the housing services based on eligible referrals from DBH, which matches the housing funds by providing supportive services. At the end of FY 2015, we were providing assistance to 147 families through this program. With the approval of the Department of Housing and Urban Development, on September 1st 2015, this grant absorbed the S + C Good Samaritans grant.
- ***Good Samaritan (S + C)*** – This is an ongoing program and is offered through the Department of Behavioral Health for chronically homeless individuals that are currently receiving services from the department. With the approval of the Department of Housing and Urban Development, on September 1<sup>st</sup> 2015, this grant was combined with the S + C New Horizons grant. At the end of FY 2015, we were providing assistance to 35 families through this program.
- ***Laurelbrook Estates (S + C)*** – This program assists individuals or families experiencing disabling conditions and homelessness and is a Project Based S+C voucher subsidy tied to designated scattered sites throughout the County of San Bernardino. The supportive services are offered through the Department of Behavioral Health. At the end of FY 2015, we were providing assistance to 24 families through this program.
- ***Project Gateway (S + C)*** – HACSB formed a partnership with Ontario Housing Authority, Mercy House Living Centers Inc. and Department of Behavioral Health (DBH) to provide permanent housing in conjunction with long term supportive services including mental health care, employment, self-sufficiency etc. to our homeless community. At the end of FY 2015, we were providing assistance to 13 families through this program.
- ***Cornerstone (S + C)*** - This program implemented in 2012, and provides rental assistance for hard to serve homeless individuals and families with disabilities in connection with supportive services funded through the Department of Behavioral Health (DBH). HACSB provides the housing services based on eligible referrals from DBH, which matches housing funds by providing supportive services. At end of FY 2015, we were providing assistance to 64 families through this program.
- ***Whispering Pines (S + C)*** - This program implemented in 2012, and provides rental assistance for hard to serve homeless individuals and families with disabilities in connection with supportive services funded through the Department of Behavioral Health (DBH). HACSB provides the housing services based on eligible referrals from DBH, which matches housing funds by providing supportive services. At the end of FY 2015, we were providing assistance to 35 families through this program.

- **Lantern Woods (S + C)** - This program implemented in 2012 and is a Project Based S+C voucher subsidy tied to designated sites in the County of San Bernardino. The supportive services are offered through the Department of Behavioral Health for homeless individuals and families. At the end of FY 2015, we were providing assistance to 10 families through this program.

## **HACSB College Scholarship Program**

For 24 years, the Housing Authority has been proud to assist eligible participants in achieving their higher educational goals through scholarships. To date, HACSB has awarded 285 students with \$208,750 in scholarships. Current participants/residents in Housing Choice Voucher programs, Public Housing programs, or other HACSB affordable housing communities are eligible to apply. Students need to be accepted by or currently attending a four-year college/university, community college, or technical/vocational school. Students attending a four-year college or university receive a \$1,500 scholarship while community and technical/vocational students receive a \$750 scholarship. The Housing Authority uses non-public funds to promote educational success among their participants.

In 2015 thirteen students were awarded scholarships to assist them with their college expenses. The recipients are attending one of the following colleges/universities: Cal Baptist University, California State University Pomona, California State University San Bernardino, Loma Linda University, San Bernardino Valley College, University of California Los Angeles, and Walden University. Their areas of study include majors such as: Biology, Business Administration, Business Economics, Criminal Justice, Early Childhood Education, English, Masters in Social Work, Masters in Health Psychology, and Nursing.

Also for the first time HACSB received a \$1,500 donation for the scholarship fund from Mr. Bob Doshi and his family, longtime landlords of our voucher program. Mr. Doshi believes in helping our families succeed: “We care about the families we serve through the Housing Authority and education is a key component to success.” He hopes his contribution will also inspire other landlords of the program to donate to this important cause.

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

KEYS is a 501(c)(3) nonprofit corporation created in 2009 by HACSB to consolidate HACSB’s array of supportive services, centralize strategic community partnership development, and to provide additional support and services for economically disadvantaged families and children. The development of KEYS created a unique opportunity to utilize non-traditional, non-PHA funding sources to bring additional resources not only to the clients that HACSB serves, but to be able to spread resources to those in need, not directly served by HACSB, subsequently assisting HACSB in

achieving our mission of *empowering all individuals and families in need to achieve an enriched quality of life by providing housing opportunities and resources throughout San Bernardino County.*

The mission of KEYS is to empower low-income individuals and families in San Bernardino County and to unlock their potential for success. Our vision is for individuals and families to have the skills and resources necessary to thrive.

Over the past fiscal year, KEYS has focused on some of the county's families in greatest need. In January 2015, in partnership with HACSB and the San Bernardino County Transitional Assistance Department (TAD), KEYS launched the Housing Support Program (HSP), a Rapid Rehousing program based on national best practices to rapidly transition eligible homeless families with children back into permanent housing. KEYS has utilized its experience with the SSVF program and housing navigation to rapidly identify and secure permanent housing for families. As part of the ongoing support of the families (up to 6 months) and to ensure stabilization KEYS utilizes its Family Strengthening casework model to ensure resources and tools are in place for the family to maintain their housing over time and increase economic independence.

KEYS continues to focus on a "collective impact" strategy which aligns with a county wide approach called the Launch Initiative. KEYS has committed to utilize its unique casework model in partnership with the Launch initiative and the Loma Linda University School of Social Work to implement a pilot program in the coming year. The Launch Initiative, is a shared vision to align key leaders in education, safety, housing, faith, nonprofit, and business sectors to: 1) stabilize housing, 2) develop supportive services, 3) provide career development opportunities, and 4) develop long term career placement options for families so they move from poverty to prosperity.

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

## **Other Affordable Rental Housing**

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

**Affiliate Non-Profit** – Housing Partners I, Inc. (HPI, Inc.) was created in 1991 to develop, own, and manage affordable housing as an affiliate non-profit of HACSB. HPI, Inc.'s designation as a Community Housing Development Organization (CHDO) allows it to apply for and receive HOME funds from the County of San Bernardino, Department of Community Development and Housing and other cities for the acquisition, development and rehabilitation of housing units. With over 20 years of housing development experience behind it, HPI, Inc. provides HACSB the means with which to leverage a variety of public as well as private funding sources to continue to increase the supply of affordable housing throughout the county of San Bernardino.

In 2015 HPI broke ground on the Horizons at Yucaipa development, a new construction affordable senior project that will be completed in the fall of 2016. HPI also acquired a 25-unit development in the City of Loma Linda for homeless and affordable Veteran Housing, providing much need supportive services to Veterans living on site. Overall in 2015 HPI is constructing or partnering in over 300 new affordable housing units within San Bernardino County.

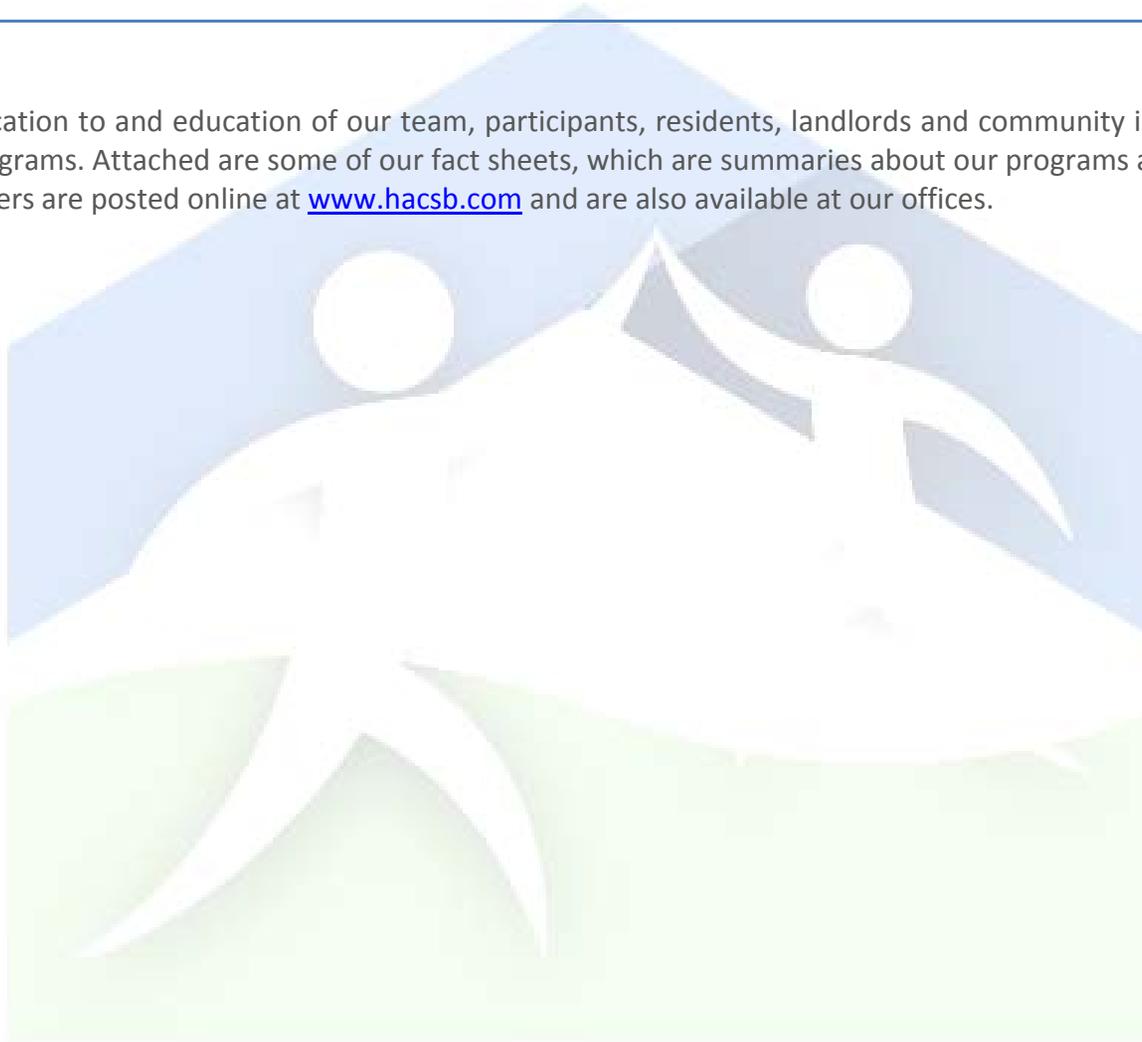
HPI Property Acquisitions LLC is an HPI, Inc. controlled entity that owns 241 units throughout the County of San Bernardino. HPI Inc. and its affiliates own a total of 654 units, detailed in the list below.

<b>Affiliate Non-Profit</b>			
<b>Property Name</b>	<b>City</b>	<b>Units</b>	<b>Entity</b>
Acacia Property	Fontana	28	HPI Property Acquisition LLC
Desert Village	Victorville	46	HPI Property Acquisition LLC
Chehalis Property	Apple Valley	30	HPI Property Acquisition LLC
Kendall Drive Apts.	San Bernardino	37	HPI Property Acquisition LLC
Kendall Park Apts.	San Bernardino	52	HPI Property Acquisition LLC
Robert O. Townsend	Montclair	48	HPI Property Acquisition LLC
Phoenix Apartments	San Bernardino	7	HPI Wall Avenue LLC
Vista del Sol	Redlands	71	HPI, Inc. Portfolio
Scattered Sites – Region 1	Loma Linda, Redlands, Yucaipa, Bloomington, Colton, Fontana, Rancho Cucamonga	97	HPI, Inc. Portfolio
Scattered Sites – Region 2	Ontario, Montclair, Chino	107	HPI, Inc. Portfolio
Scattered Sites – Region 3	Adelanto, Apple Valley, Hesperia, Victorville, Joshua Tree, 29 Palms, Yucca Valley	131	HPI, Inc. Portfolio
<b>TOTAL UNITS</b>		<b>654</b>	

# Appendix C: Fact Sheets

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



# HACSBFACTSHEET

## Who We Are | OVERVIEW

### Our Business

The Housing Authority of the County of San Bernardino (HACSB) is one of the nation's most progressive housing authorities in the Country. As the largest provider of affordable housing in the County, we proudly serve an excess of 30,000 people, most of whom are seniors, disabled individuals, and children.

As a non-traditional housing authority, our agency's success is a result of our business approach to strategic planning and delivery of services. Former Assistant Secretary Sandra Henriquez stated that the success of the Boston Housing Authority during her tenure was a result of "operating as a private business with a social mission." This philosophy resonates at our agency. As a business entity that serves as good stewards of taxpayer's dollars, we cannot properly serve our families unless we operate an effective and productive business.

We also work to provide our families with the resources, skills, and motivation to transition out of government-assisted programs and into economic independence. As a reflection of our mission and service philosophy, we have increased our resident services and coupled them with new initiatives such as five year term limits, work requirements, rent reform such as minimum rent increases and gradually increasing rent, and others. Initiatives such as these insure greater personal accountability for our families while providing meaningful services to help them achieve economic self-sufficiency.

As a strong business entity, the investment of taxpayer dollars into HACSB benefits the entire county and its residents. In fiscal year 2013-2014 we infused \$108.3 million into the county's economy as a housing and

service provider, developer, and employer. Our monetary contributions during the fiscal year included:

- \$75.2 million paid in housing assistance payments to almost 4,000 landlords
- \$11.6 million paid to 652 vendors for various programs and services
- \$3.2 million on rehab, construction and acquisition of housing units



Our agency's business success comes in spite of the economic and social challenges facing San Bernardino County. The ongoing economic downturn, especially in the housing industry, has left many families without jobs and homes, increasing the demand for affordable housing, social services, and

assistance from government programs. Table 1 highlights some critical statistics that paint a picture of the reality facing the residents and communities of San Bernardino County.

#### TABLE 1: SAN BERNARDINO COUNTY STATS

- \$3 billion are allocated yearly to families receiving cash assistance, Medi-Cal, and food stamps.
- 17% of individuals are receiving some form of assistance in cash benefits and/or food stamps
- 25% of all children live in poverty
- \$21,636 in per capita income is lower than the state and national levels
- 9.4% unemployment rate compared to the 8.5% state level, and 7.2% national level
- 6th in foreclosures statewide
- 33% of working households are experiencing a severe housing cost burden
- City of San Bernardino is the 2nd poorest city in the United States, with 34% of people below the national poverty level

## Affordable Housing: What and Who

Affordable housing provides working individuals, in low paying jobs, the opportunity to afford a place to live. Research shows that in San Bernardino County, to rent a two-bedroom apartment, a household needs an income of \$45,000.

Table 2 highlights how many common professions require vocational training and even Bachelor's degrees, indicating, that contrary to popular belief, educated professionals also need affordable housing.

<b>TABLE 2<sup>1</sup></b> <b>Very-Low Income Earners in San Bernardino County (below 50% median income)</b>	<b>Average Annual Salary</b>
Cashiers	\$20,766
Child Care Workers	\$22,889
Preschool Teachers	\$25,261
Receptionists	\$26,232
Bank Tellers	\$27,593
Medical Secretaries	\$30,344
School Bus Drivers	\$30,441
Dental Assistants	\$30,568
Paramedics and EMTs	\$31,249

<sup>1</sup> Source: California Campaign for Affordable Homes 2010

## Housing Types and Development

We recognize that affordable housing is necessary for families of all income ranges, and we are committed to providing both traditional affordable housing assistance as well as affordable mixed income housing that complements existing communities. Therefore, we manage two levels of housing programs:

- **Affordable Housing:** Rental assistance is available for over 10,000 low-income households in the form of a voucher, lease assistance, or housing at an affordable housing community.

- **Market Rate Housing:** We moved beyond the traditional housing programs and expanded our housing stock as a developer of sustainable affordable and market rate housing. The revenue from these market rate units has helped us build and acquire more affordable housing.

## Innovation at Work

Since 2008, HACSB has been one of a select few housing authorities to be designated as a Moving to Work (MTW) demonstration agency. This designation provides the flexibility to waive some current program requirements in order to develop local policies that are best suited to the community. In the past seven years, we have used this flexibility to transform our agency and tailor our programs to meet the unique challenges found in San Bernardino County. Building upon our proven practices, we have executed innovative initiatives with three key goals in mind: save taxpayer dollars through efficient work; help our families achieve economic independence; and ensure a family's freedom of housing choice.

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

- **Saving Taxpayers' Dollars:** We have continued to benefit from substantial operational efficiencies through developed MTV activities, with new business practices such as checking incomes every two years instead of annually and more friendly and efficient methods of tracking resident information. As a result of these activities, in FY 2014 the total staff hours saved was over 15,000 hours.



- **Serving More Families:** The savings helped us assist 539 additional families in our Housing Choice Voucher Program (to 8,285), a 7% increase from the first year as an MTW agency; despite the on-going federal funding cuts to our programs. Currently our lease rate is over 98% in the HCV program, and 99% in the Affordable Housing program.
- **Addressing Local Needs:** Given the vast geographic area and demographic differences in our 20,000 square mile county, HUD's previous payment standard did not accurately represent our rental market. To address this issue, HACSB contracted with an independent third party firm to conduct a detailed rental analysis and created nine rental submarkets with updated payment standards; the outcome is one of our Local Payment Standards MTW activity. Since the implementation of this activity, our per unit costs have reduced from \$730 to \$665. The projected annual cost savings is \$6.4million – enough to house 800 additional families and/or mitigate funding cuts. This activity also empowered our families to move to areas with better schools, access to transportation and/or job opportunities that may have been previously inaccessible. As an example, we have seen a 9% decrease in the number of families living in the two highest poverty areas of our county.
- **Limiting housing assistance to serve more families:** The Five Year Lease Assistance Program, implemented on January 1, 2012, is a five year term limit activity for all new individuals/families (except seniors and disabled individuals) pulled from the voucher program waiting list. Families in this program receive a flat rental subsidy which is equal to the lesser of 50% of the contract rent or 50% of the payment standard for the given submarket. As we backfill through attrition and limit the number of years families can receive housing assistance, we hope to reduce the wait time for the 18,000 applicants on our waiting lists. The program also provides coaching, job search assistance, and other services to assist in families' self-sufficiency efforts. Our staff works closely with each adult to develop an Individual Training and Services Plan (ITSP) which serves as a guide for self-sufficiency goals. Nearly 800 households currently participate in the Five-Year Lease Assistance program.
- **Program Integrity:** The activities that promote administrative efficiency have enabled staff to focus on other areas. For example, in 2010, HACSB incorporated a Program Integrity Unit that provides training, education, and prevention tools to maintain compliance in all aspects of the agency's housing programs.



- **Combining Administrative Efficiency with Economic Self-Sufficiency:** In 2015 HACSB began implementing one of its newest MTW initiatives, known as Streamlined Lease Assistance. This innovative program overhauls the complex and burdensome standard income calculation formulas for both the Affordable Housing and Voucher programs. The resulting streamlined calculation is much simpler to administer and easier for families to understand. Under the program, elderly and disabled families will pay a fixed percentage of their gross income toward rent, while non-elderly and non-disabled families will pay a tiered rent which increases gradually over a six-year period. Gradually increasing rent will help prepare families for the cost of market rent without assistance, while the transparent rent calculation method will enable them to understand and budget for rental costs.
- **Targeting Assistance to Those Who Need it Most:** Another new MTW initiative to be implemented in 2015 is the Transition for Over-Income Families. Under this activity, any Affordable Housing or Voucher program family whose income exceeds 80% of the median income by family size will be given a six-month transition period. The family will continue to receive housing assistance during the transition period, allowing them time to locate new housing or make other arrangements. At the end of the transition period, the family's housing assistance will end. This activity is expected to reduce the wait for families on the waiting list as over-income households are transitioned and assistance becomes available to serve new families from the waiting list.

## More Than Just Housing

As we increase the number of families served we are also expanding the types of services we provide. As catalysts, we provide and leverage services that will help our families build a foundation for economic independence. In collaboration with our partners, below are a few of the services we provide:

- **College Scholarships:** For the past 21 years, we have provided 292 students with \$192,250 in scholarships using non-public funds.
- **Computer and Software Skills Development:** Computer labs offer internet access, education and career planning, resume review and editing, job search and employment application assistance, and basic training on Microsoft Office Programs.
- **Family/Individual Case Management and Counseling:** In order to enhance the quality of life of our families, staff works on coordinating the delivery of services and resources from partners.
- **Homeownership Assistance:** Since 2001, the homeownership program has helped 192 families, 22 of which graduated from the Family Self-Sufficiency Program, reach their life goal of homeownership. Since 2009, this program has ranked among the top in the nation in creating new homeowners each year.



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



# HACSBFACTSHEET

## Pilot “Work” Requirement | OVERVIEW

The Housing Authority of the County of San Bernardino (HACSB) is one of the most progressive housing authorities in the Country. As the largest provider of affordable housing in the County, we proudly serve and house approximately 30,000 people, most of whom are seniors, children, and individuals with disabilities. Our mission is to provide more than just housing – we are dedicated to providing the families we serve with the resources, skills, and motivation to transition out of assistance programs and into economic independence. We partner with government agencies, employment services providers, institutions of higher education, and other community partners to provide support and tools that families need to be successful.

As an innovative and proactive agency, HACSB is one of only 39 Housing Authorities of 3,200 nationally to be designated by Congress as a Moving to Work demonstration site. Under this special designation, we implement new business practices and program services with three goals: 1) develop economically independent clients; 2) ensure freedom of housing choice; and 3) save taxpayer dollars through operational efficiencies. In alignment with these goals and our mission, we have coupled our resident services with new initiatives such as the Pilot “Work” Requirement.

The pilot “work” requirement was implemented in January 2013 for residents of the Maplewood Homes Housing Community. All non-disabled current and future adult household members between the ages of 18 and 61 must participate for a minimum of 15 hours a week in “work” activities. The definition of “work” encompasses participation in any one of the three phases:

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

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

### **Phase 2: Activities leading to gainful employment**

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

### **Phase 3: Employment**

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

### **RESOURCES AVAILABLE**

The on-site Family Resource Center Coordinator assists families in leveraging various community resources and provides case management services to help families find ways to meet the “work” requirement. We partner with various community organizations, local government agencies, businesses, and schools to provide the residents with various

resources to assist them with this requirement. The on-site computer lab has computers with increased broadband speeds and an on-site technician who teaches classes on Microsoft Office. The technician also facilitates the Neighborhood Job Network which is designed to provide job seekers with the skills and abilities needed to secure employment. Through the Neighborhood Job Network, residents have weekly access to new job leads, assistance with resume development, assistance with online job applications, and information on effective job search techniques.

Additionally, HACSB contracted with the County Workforce Development Department to hire an on-site Workforce Development Department Specialist (WDS). The WDS provides families with additional employment services such as job placement, interview skills training, resume writing, and other topics related to employment.

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

## OUTCOMES

HACSB is proud to report that the activity has resulted in positive outcomes since implementation:

- The average earned income for Maplewood Homes families has increased by nearly 13%
- Unemployment among heads of households has decreased by nearly 13%
- Full-time and part-time employment, among heads of household, has each increased by 6%

- Twenty-two individuals located employment with assistance from the WDS, with wages ranging from \$9.00 to \$16.00 per hour

HACSB anticipates that these positive outcomes will continue as families progress from Phase 1 to Phase 3, and as our partnerships with community resource providers continue to expand.

## EXEMPTIONS AND HARDSHIP POLICY

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

## COMPLIANCE

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

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

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



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02.23.2015

# HACSBFACTSHEET

## Five-Year Lease Assistance Program | OVERVIEW

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

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

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

In alignment with our mission and service philosophy, HACSB has implemented a Five-Year Lease Assistance Program. The program is designed to help families achieve economic independence while they receive five years of housing assistance through the Housing Choice Voucher program. Beginning in January, 2012, individuals/families admitted from the Housing Choice Voucher Program waiting list receive housing assistance with a five year term limit through the Five Year Lease Assistance Program. All elderly<sup>1</sup> and disabled<sup>2</sup> applicants are exempt from this program and receive assistance

under HACSB's other Moving to Work Housing Choice Voucher programs, such as the Streamlined Lease Assistance program. As of September 2014, nearly 800 families are participating in Five-Year Lease Assistance.

### PROGRAM OBJECTIVES

The primary purpose of the Five Year Lease Assistance Program is to help families achieve economic independence. The program provides families/individuals the opportunity to pursue personal and professional goals, such as completing educational programs or securing better employment, while their housing is stable and secure. Through this term limit program, HACSB also anticipates serving more families by being able to pull applicants from the waiting list as participants reach the end of their participation in the program.

### ASSISTING FAMILIES TO ACHIEVE SELF-SUFFICIENCY

HACSB's Community Development Initiatives team helps to connect and refer families to supportive services and various economic mobility resources throughout the County. Specifically, our team works with adult household members to: 1) assess individual strengths and barriers; 2) create a personalized education and/or professional action plan; and 3) leverage and access existing resources including HACSB's Career and Technology Centers and job placement services at our various affordable housing sites. Personal, educational, and professional target areas include:

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

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

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

## **DETERMINING THE LEASE ASSISTANCE AMOUNT**

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

## **OUTCOMES**

HACSB is proud to report that the activity has resulted in positive outcomes since implementation:

- The average earned income for families in the Five-Year Lease Assistance program has increased by 12.5%;
- Full-time and part-time employment among heads of household have increased by 12% and 5%, respectively.
- Fifty-six individuals located employment with assistance from the WDS, with wages ranging from \$8.00 to \$25.00 per hour.

HACSB anticipates that these positive outcomes will continue as our partnerships with community resource providers continue to expand and as families progress through their individual action plans

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

After a family/individual is selected from the waiting list, they must attend an eligibility briefing where they

will learn about what it takes to be successful, including how to submit required paperwork, establishing their personal action plans, and locating a housing unit.

## **PORTABILITY**

HACSB participants moving (porting) out of San Bernardino County are also subject to the Five Year Lease Assistance Program's term limit, but not to the flat subsidy. Participants moving (porting) in are not subject to the Five Year Lease Assistance provisions or the flat subsidy. However, the work requirement applies to all adult household members, except elderly<sup>3</sup> and disabled<sup>4</sup> participants.

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

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

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

<sup>3</sup> Elderly Port in: Any household member 57 years of age or older

<sup>4</sup> Disabled Port in Individual: Any household member receiving permanent disability income

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



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# HACCSB FACTSHEET

## Streamlined Lease Assistance Program | OVERVIEW

The Housing Authority of the County of San Bernardino (HACSB) is one of the nation's most progressive housing authorities in the Country. As the largest provider of affordable housing in the County, we proudly serve and house more than 30,000 people, most of whom are seniors, veterans, individuals with disabilities, and children. We also work to provide our families with the resources, skills, and motivation to transition out of assisted programs into economic independence.

### OVERVIEW

On November 1, 2014, HACSB will implement a new initiative – Streamlined Lease Assistance Program - which simplifies the cumbersome rent calculation for households in the Housing Choice Voucher and Public/Affordable Housing Programs (excluding households assisted under the Five Year Lease Assistance Program). Non-elderly/non-disabled households will utilize a tiered rent calculation while a fixed rent calculation will apply to elderly/disabled households.

### TIERED AND FIXED RENT SUBSIDIES

The tiered subsidy for all non-elderly and non-disabled households will be effective at their next biennial recertification. The household's portion of the rent will start at 21% of their gross annual income and increase by 3% at every recertification (two years) to a final tier of 30% of annual income. For Housing Choice Voucher families that choose to rent a unit that is larger than their approved bedroom size, they will be responsible for the difference between their eligible payment standard and the contract rent. The table below illustrates the tiered schedule:

TIERED SCHEDULE FOR NON ELDERLY AND NON DISABLED HOUSEHOLDS				
Timeline	Next Recertification	Year 2	Year 4	Year 6
% of the household gross annual income	21%	24%	27%	30%

The fixed rent subsidy for all elderly and disabled households will also be effective at their next biennial recertification and the household's portion of the rent will be fixed at 24% of their gross annual income. This percentage will be used to calculate the total tenant payment. These households are not subject to a tiered subsidy.

FIXED PERCENTAGE FOR ELDERLY AND DISABLED HOUSEHOLDS	
Timeline	Next Recertification
% of the household gross annual income	24%

Both the tiered and fixed rent subsidy processes will eliminate all other deductions and allowances (e.g. dependents, elderly/disabled, childcare, medical, disability expense, utility, etc.) resulting in a simpler calculation which will benefit the agency and the family.

### GOALS OF THE PROGRAM

Through this program, families will have a better understanding of the rent structure because the calculation of the tenant portion will be simplified. This program will also help households become economically independent as they will be able to budget and plan other expenses since the simplified rent will be a percentage of gross annual income and can be factored into their household expenses more accurately.

HACSB staff will realize administrative efficiencies due to the simplification of the rent calculation process. Also, family income changes between recertifications will not be used to adjust the tenant rent portion, which can allow families to develop savings.

## HARDSHIP POLICY

A hardship criteria has been developed for families that see a significant increase in their rent portion. In order for families to be eligible, they must be in compliance with all program rules and regulations. Families must provide all supporting documents regarding their case and hardships will be reviewed by our Program Integrity Unit (P.I.U.) that oversees both the Housing Choice Voucher and the Affordable Housing Programs. Circumstances that will be taken into consideration include no fault loss of income, over housed situation, unforeseen medical expenses, etc. If approved, P.I.U. will determine the amount and effective timeline for the hardship request.

Additionally, existing families currently residing in a unit that is larger than their voucher size may apply for a hardship if they are unable to pay the difference in rent between the payment standard for their voucher size and contract rent. If approved, the families will be required to move to a right-sized unit

within 6 months, during which HACSB will pay the difference between the payment standard for their voucher size and contract rent.



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



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# Appendix D: Summary of MTW Activities

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR(S)	STATUS
1	Single Fund Budget	Administrative Efficiency	FY 2009	Implemented
2	Strategic Investment Policies	Administrative Efficiency	FY 2009	Implemented
3	Alternate Assessment Program	Administrative Efficiency	FY 2009	On Hold - FY 2011
4	Biennial Recertifications	Administrative Efficiency	FY 2009, 2012	Implemented
5	Local Verification Policies	Administrative Efficiency	FY 2009	Implemented
6	Elimination of Assets	Administrative Efficiency	FY 2009	Implemented
7	Controlled Program Moves	Administrative Efficiency	FY 2009	Implemented
8	Local Policies for Portability	Economic Independence	FY 2009, 2010	Implemented
9	Elimination of Earned Income Disallowance	Economic Independence	FY 2009	Implemented
10	Minimum Rent	Economic Independence	FY 2009	Implemented
11	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009, 2011	Implemented
12	Local Payment Standards	Expanding Housing Opportunities	FY 2009, 2012	Implemented
13	Local Inspection Standards	Administrative Efficiency	FY 2010	Implemented
14	Local Asset Management Program	Administrative Efficiency	FY 2010	Implemented
15	Pilot Work Requirement	Economic Independence	FY 2010	Implemented
16	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010	Closed Out September 15, 2010
17	Local Income Inclusion	Economic Independence	FY 2011, 2016	Implemented
18	Property Management Innovation	Administrative Efficiency	FY 2011	Implemented
19	Local FSS program	Economic Independence	FY 2011	Implemented
20	Five Year Lease Assistance Program	Economic Independence	FY 2011, 2015, 2016	Implemented
21	Utility Allowance Reform	Administrative Efficiency	FY 2012	Closed Out - Never Implemented
22	Streamlined Lease Assistance Program	Administrative Efficiency	FY 2013, 2016	Implemented
23	No Child Left Unsheltered	Economic Independence	FY 2014	Implemented
24	Transition for Over-Income Families	Economic Independence	FY 2014	Implemented
25	Local PBV Flexibility for Horizons at Yucaipa Senior Housing	Expanding Housing Opportunities	FY 2016	Not Yet Implemented