

2018

Moving to Work

ANNUAL REPORT

Housing Authority of the County of San Bernardino



*Building Communities
Changing Lives*

MTW DESIGNATED AGENCY



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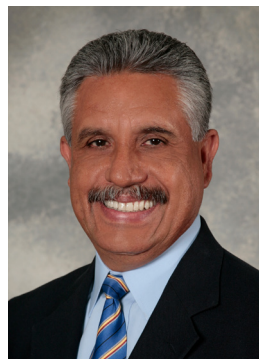
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OUR MISSION

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.



Housing Authority of the County of San Bernardino **EXECUTIVE MANAGEMENT TEAM**



Maria Razo
Executive Director



Gustav Joslin
Deputy Executive Director



Jennifer Dawson
Director of Human Resources



Ana Gamiz
Director of Policy and Public Relations



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FOR MORE INFORMATION

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Section I: Introduction

For over 75 years, the Housing Authority of the County of San Bernardino (HACSB) has been a leading provider 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 and covering over 20,000¹ square miles of land, and with a population of more than 2.1 million individuals. The population of San Bernardino County is estimated to have grown by 6² percent between 2010 and 2017 and is expected to rise by 28%¹ between 2020 and 2045. HACSB proudly serves more than 30,000 people, most of whom are seniors, disabled individuals and children.

Our agency's success is a result of our business approach to strategic planning and delivery of services. We strive to design our program as a stepping stone, providing housing stability to the families we serve on their path to economic independence. In alliance 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. 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 program for housing authorities to design and test innovative housing and self-sufficiency initiatives targeted to address local needs. 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 households to pursue self-sufficiency, and improve administrative and operational cost effectiveness.

¹ San Bernardino County 2015 Community Indicators Report

² Census Quick Facts 2017

As a high-performing, innovative and progressive agency, HACSB received its MTW designation in 2008. In April 2016 the MTW agreement was extended for an additional ten years through 2028. HACSB has completed its ninth year of participation, and during that time we have developed 26 MTW initiatives. HACSB’s MTW designation allows us to test new methods to improve housing services and to better meet local needs. A timeline of our MTW Plans and Reports follows.

MTW Plan	Approved by HUD
FY 2009 MTW Plan	September 25, 2008
Amendment 1	June 29, 2009
FY 2010 MTW Plan	September 30, 2009
Amendment 1	November 18, 2009
Amendment 2	February 22, 2010
Amendment 3	September 15, 2010
FY 2011 MTW Plan	October 18, 2010
FY 2012 MTW Plan	October 5, 2011
Amendment 1	November 4, 2011
FY 2013 MTW Plan	September 27, 2012
FY 2014 MTW Plan	May 14, 2014
FY 2015 MTW Plan	February 13, 2015
Amendment 1A	May 11, 2015
Amendment 1B	N/A. Proposed changes moved to 2017 MTW Plan.
Amendment 2	N/A. Proposed changes moved to 2017 MTW Plan.
FY 2016 MTW Plan	November 4, 2015
FY 2017 MTW Plan	February 2, 2017
Amendment 1	April 3, 2017
Amendment 2	September 27, 2017
FY 2018 MTW Plan	October 25, 2017
FY 2019 MTW Plan	October 9, 2018

MTW Report	Accepted by HUD
FY 2009 MTW Report	April 22, 2010
FY 2010 MTW Report	March 21, 2011
FY 2011 MTW Report	March 20, 2012
FY 2012 MTW Report	July 19, 2013
FY 2013 MTW Report	December 31, 2013
FY 2014 MTW Report	December 31, 2014
FY 2015 MTW Report	December 22, 2015
FY 2016 MTW Report	August 16, 2018
FY 2017 MTW Report	October 9, 2018
FY 2018 MTW Report	Pending acceptance

Overview of Short-Term and Long-Term MTW 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 ongoing budget reductions, 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
- Activity 25 – Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing

Long-Term Goals

Prior to our MTW designation in 2008, HACSB completed a 30-year strategic planning process to develop the agency’s long-term goals. These goals serve to guide us toward achieving our mission and vision. Our short-term milestones and annual accomplishments mark our progress toward realizing the 30-year strategic goals.

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

The flexibilities provided through our MTW designation assist in our efforts to achieve our long term goals, and our long-term vision aligns with the statutory objectives of the MTW program. HACSB currently has 26 approved MTW activities and no activities pending HUD approval.

Twelve activities address the objective of operational efficiency, nine assist families with their economic independence efforts, and five 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. We continually seek 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 MTW statutory objectives and our vision of creating a world in which all people have a stable and enriched quality of life. We achieve our long-term goals by aligning our agency's short-term strategic goals with the 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 five MTW activities that address this goal (listed under the expanding housing opportunities statutory objective in the following table).

The following table 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	Simplified Income Determination	Cost Effectiveness	FY 2009	Implemented
Activity 6	Elimination of Assets	Cost Effectiveness	FY 2009	Closed Out
Activity 7	Controlled Program Moves	Cost Effectiveness	FY 2009	Closed Out
Activity 8	Local Policies for Portability	Self-Sufficiency	FY 2009	Implemented
Activity 9	Elimination of Earned Income Disallowance	Self-Sufficiency	FY 2009	Closed Out
Activity 10	Minimum Rent	Self-Sufficiency	FY 2009	Implemented
Activity 11	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009	Implemented
Activity 12	Local Payment Standards	Expanding Housing Opportunities	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	Closed Out
Activity 16	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010	Closed Out
Activity 17	Local Income Inclusion	Self-Sufficiency	FY 2011	Closed Out
Activity 18	Property Management Innovation	Cost Effectiveness	FY 2011	Implemented
Activity 19	Local FSS program	Self-Sufficiency	FY 2011	Implemented
Activity 20	Term-Limited 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 23	No Child Left Unsheltered	Self-Sufficiency	FY 2014	Implemented
Activity 24	Transition for Over-Income Families	Self-Sufficiency	FY 2014	Implemented

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR	STATUS
Activity 25	Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing	Expanding Housing Opportunities	FY 2016	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:*
 - In FY 2017 the HACSB team finalized a contract with a client database software for upgrade in FY 2018.
 - Implemented a new on-line training system for employees.
 - Created and enhanced a comprehensive asset performance and quality control program for all HACSB properties.

- **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:*
 - Enhanced economic opportunities for youth and young adults by implementing a Youth Employment Program which provides program participants between the ages of 16-24 with 6 months of subsidized employment. Twenty-five youth and young adults committed to the program, during the fiscal year, to gain employment experience, improve work skills, and become self-sufficient. Launched a new Employment, Training, and Resource page on the agency’s website where participant families can conveniently gain access to local opportunities that meet the specific needs of their households. Expanded scholarship application submission period from once a year to quarterly to accommodate lifetime learners who often have non-traditional terms. Participated in several collaborative employment resource and opportunity events for participants to connect with local employers and resource organizations.

- **Goal 3 – Ensure freedom of housing choice** – *Providing quality affordable housing opportunities in mixed-income communities with access to excellent quality of life:*
 - Phase I of on-site construction at the Waterman Gardens Public Housing site was completed, 62-units, and a groundbreaking was held on September 28, 2017.
 - Phase I of construction for Horizons at Yucaipa Senior Housing Community was completed and a groundbreaking was held on June 6, 2017. All 50-units are Project-Based Voucher units.
 - Acquired Golden Apartments, 21-units expected to be converted to 38-units post-rehabilitation work. Purpose is to provide permanent supportive housing for chronically homeless.
 - Acquired Queens Motel, 61-units expected to be converted to 31-units post rehabilitation work.
 - Completed Phase 1 of RAD conversion 552 units – this conversion has allowed us to address deferred capital improvements. Purpose is to provide permanent supportive housing for chronically homeless.

- Our full Public Housing portfolio was approved for the Rental Assistance Demonstration Program, and conversion began in 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 Colton, Loma Linda, Redlands, San Bernardino, Victorville, and Yucaipa.
- The HACSB affiliate non-profit, KEYS, has been re-structured to focus on supporting rapid rehousing and stabilization services for special populations with a current focus on homeless families with children and homeless veterans and their families. Through its various programs, during this calendar year, KEYS has housed 558 homeless families.

Serving the needs of our residents and helping them on their path to economic independence is a priority at HACSB. The administrative efficiencies achieved through our activities helped create the Career 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 confident that through our long term strategic planning and collaboration with community partners, we will reach our mission of empowering all individuals and families in need to achieve an enriched quality of life by providing housing opportunities and resources throughout the County of San Bernardino.

Section II: General Operating Information

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

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

i. Actual New Project-Based Vouchers

PROPERTY NAME	NUMBER OF VOUCHERS NEWLY PROJECT-BASED		STATUS AT END OF PLAN YEAR	RAD?	DESCRIPTION OF PROJECT
	PLANNED	ACTUAL			
Ivy at College Park, Chino	8	8	Leased/Issued	No	Family Community, New Development
Veterans' Housing, Various Sites	60	12	Leased/Issued	No	Veterans' Housing, Existing Developments
Veterans' Housing, Loma Linda	37	36	Committed	No	Veterans' Housing, New Development
Rosena Fountains, Fontana	8	8	Leased/Issued	No	Family Community, New Development
Golden Apartments	28	38	Committed	No	Chronically Homeless, Existing Development
Queens Motel	29	31	Committed	No	Chronically Homeless, Existing Development
TOTAL	170	133			

ii. Actual Existing Project-Based Vouchers

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS		STATUS AT END OF PLAN YEAR	RAD?	DESCRIPTION OF PROJECT
	PLANNED	ACTUAL			
Redlands – Lugonia (Phase II)	104	104	Committed	Yes	Family Community, New Development
Waterman Gardens	252	252	Committed	Yes	Family Community, Existing Development
Waterman Phase 2	61	61	Leased/Issued	Yes	Family Community, New Development
Scattered Sites (AMP 2)	97	97	Leased/Issued	Yes	RAD Conversion, Existing Public Housing Community
Maplewood Homes	296	296	Leased/Issued	Yes	RAD Conversion, Existing Public Housing Community
Scattered Sites (AMP 3)	34	34	Leased/Issued	Yes	RAD Conversion, Existing Public Housing Community
Redlands (AMP 5)	140	140	Leased/Issued	Yes	RAD Conversion, Existing Public Housing Community
Colton/Chino (AMP 6)	179	179	Committed	Yes	RAD Conversion, Existing Public Housing Community
Barstow (AMP 7)	224	224	Committed	Yes	RAD Conversion, Existing Public Housing Community
Yucaipa Terrace	51	51	Leased/Issued	No	Senior Community, Existing Development
Arrowhead Woods	51	51	Leased/Issued	No	Senior Community, Existing Development
Robert O Townsend	48	48	Leased/Issued	No	Senior Community, Existing Development
Grandview Towers	40	40	Leased/Issued	No	Senior Community, Existing Development
Desert Village	46	46	Leased/Issued	No	Senior Community, Existing Development
Redwood Terrace	68	68	Leased/Issued	No	Senior Community, Existing Development
Yucaipa Crest	45	45	Leased/Issued	No	Senior Community, Existing Development
Sunrise Vista	108	108	Leased/Issued	No	Family Community, Existing Development
Sunset Pointe	117	117	Leased/Issued	No	Family Community, Existing Development
Mentone Clusters	34	34	Leased/Issued	No	Family Community, Existing Development
Andalusia	17	17	Leased/Issued	No	Family Community, Existing Development

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS		STATUS AT END OF PLAN YEAR	RAD?	DESCRIPTION OF PROJECT
	PLANNED	ACTUAL			
Valencia Vista (Val-9)	75	75	Leased/Issued	Yes	Family Community, New Development
Valencia Grove, Redlands (Phase I)	85	85	Leased/Issued	No	Family Community, New Development
Arrowhead Commons	42	42	Leased/Issued	No	Family Community, Existing Development
NCLU- Scattered Sites	26	26	Leased/Issued	No	Project-Based Voucher Program
Vista del Sol	53	53	Leased/Issued	No	Senior Community, Existing Development
Scattered Site Units	229	229	Leased/Issued	No	Family Community, Existing Development (HPI)
Scattered Site Units	79	79	Leased/Issued	No	Family Community, Existing Development (HPI)
Meadowbrook	47	47	Leased/Issued	No	Senior Community, Existing Development
NCLU- Scattered Sites	10	10	Leased/Issued	No	Project-Based Voucher Program
NCLU- Scattered Sites	4	4	Leased/Issued	No	Project-Based Voucher Program
Horizons at Yucaipa	50	50	Leased/Issued	No	Senior Community, New Development
Bloomington (Related Phase I)	11	11	Leased/Issued	No	Family & Senior Community, New Development
Bloomington (Related Phase II)	20	20	Leased/Issued	No	Family Community, New Development
Shelter Plus Care Scattered Site Units	27	27	Leased/Issued	No	Existing Development, Project-Based Voucher Program
TOTAL EXISTING PROJECT-BASED VOUCHERS	2,770	2,770			

iii. Actual Other Changes to MTW Housing Stock in the Plan Year

The Public Housing portfolio began FY 2018 with 646 Public Housing Units. This does not include the following:

- Eight (8) offline units that had previously been permanently converted to non-dwelling units for resident services purposes such as Head-Start centers, child care, and education centers
- Twelve (12) non-ACC units used for administrative purposes and resident amenities such as community rooms, laundry rooms, etc.

During FY 2018, 384 units were converted through RAD, 48 units were removed through disposition, and 4 units were sold through the Section 32 Homeownership Program. Six (6) non-dwelling AC units were converted back to general occupancy. The net decrease in Public Housing units for FY 2018 is 430. Therefore, HACSB's Public Housing portfolio consisted of 216 units as shown in the following table.

MANAGEMENT POINT (AMP)	ACC UNITS
120	116
180	2
Upland Public Housing	98
TOTAL PUBLIC HOUSING UNITS:	216

iv. General Description of All Actual Capital Fund Expenditures during the Plan Year

The most significant expenditures of Capital Funds in 2018 were directly related to the ongoing pre-development and development work associated with our major public housing revitalization projects in Redlands and San Bernardino. Capital Funds were utilized to complete demolition of the original public housing units remaining at the site on which the second phase of the Valencia Grove (Lugonia) project in Redlands will be built. Similarly, Capital Fund supported demolition in preparation for the second onsite construction phase of the Waterman Gardens redevelopment project in San Bernardino. HACSB had 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 second 62 unit phase of the project (first phase on site) was completed and fully occupied by the end of 2017. The initial 2 phases include a total of 136 newly-constructed family units converted to vouchers under the RAD program. Capital Fund continued to be utilized to cover Architecture/Engineering, legal, consulting and resident relocation as well as direct construction costs associated with the demolition of the remaining 116 units required for the one-for-one replacement of the original 252 public housing units comprising the former Waterman Gardens site.

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 decision to complete RAD conversion for the entire Public Housing portfolio. Our RAD application for the entire portfolio was approved in FY 2015, and 552 units were converted under RAD in early FY 2016. Capital Fund continued to be utilized in 2018 to complete immediate physical needs work identified in the RAD Physical Needs Assessment(s) for those 552 units. The application(s) for RAD conversion of our remaining 354 public housing units were submitted for final HUD approval during the summer of 2017 and the final RAD conversion closed on September 28, 2018. Critical work items identified in the RAD Physical Needs Assessment have now commenced and are expected to be completed in 2019 utilizing Capital Fund.

B. LEASING INFORMATION

i. Actual Number of Households Served

NUMBER OF HOUSEHOLDS SERVED THROUGH:	NUMBER OF UNIT MONTHS OCCUPIED/LEASED		NUMBER OF HOUSEHOLDS SERVED	
	PLANNED	ACTUAL	PLANNED	ACTUAL
MTW Public Housing Units Leased	1,392	5,940	116	495
MTW Housing Choice Vouchers (HCV) Utilized	103,860	120,516	8,655	10,043
Local, Non-Traditional: Tenant-Based	0	0	0	0
Local, Non-Traditional: Property-Based	0	0	0	0
Local, Non-Traditional: Homeownership	0	0	0	0
PLANNED/ACTUAL TOTAL HOUSEHOLDS SERVED	105,252	126,456	8,771	10,538

Description of Differences between the Planned and Actual Households Served

Leasing projections for the MTW Public Housing Program for FY 2018 were based upon the anticipation that the majority of HACSB's remaining Public Housing units would be converted through the Rental Assistance Demonstration (RAD) program by the end of the fiscal year. These units were not converted until the end of the fiscal year, resulting in a larger number of Public Housing families served than was originally anticipated.

Leasing projections for the MTW Housing Choice Voucher Program for FY 2018 were prepared in early 2017, and were based on the anticipation that Housing Assistance Payment (HAP) funding for the program would be prorated to less than 97%. The planned number of

households to be served reflects this expectation. In FY 2018, actual HAP funding was prorated at 99.75%. As a result, HACSB endeavored to increase the number of families served during the year and was successful in doing so. The reported number of families served reflects all families served in FY 2018, including those who were served for only part of the year.

LOCAL, NON-TRADITIONAL CATEGORY:	MTW ACTIVITY NAME/NUMBER	NUMBER OF UNIT MONTHS OCCUPIED/LEASED		NUMBER OF HOUSEHOLDS TO BE SERVED	
		<i>PLANNED</i>	<i>ACTUAL</i>	<i>PLANNED</i>	<i>ACTUAL</i>
Tenant-Based	N/A	N/A	N/A	N/A	N/A
Property-Based	N/A	N/A	N/A	N/A	N/A
Homeownership	N/A	N/A	N/A	N/A	N/A
PLANNED/ACTUAL TOTALS	N/A	N/A	N/A	N/A	N/A

HOUSEHOLDS RECEIVING LOCAL, NON- TRADITIONAL SERVICES ONLY	AVERAGE NUMBER OF HOUSEHOLDS PER MONTH	TOTAL NUMBER OF HOUSEHOLDS IN THE PLAN YEAR
N/A	N/A	N/A

ii. Discussion of Any Actual Issues/Solutions Related to Leasing

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
MTW Public Housing	None.
MTW Housing Choice Voucher	Voucher holders are experiencing difficulty locating units due to current rental market conditions. Search times of 120 days are not uncommon. HACSB is providing families with the maximum possible search times and beginning the wait list selection process earlier than is typical in anticipation of the longer search times.
Local, Non-Traditional	N/A

C. WAITING LIST INFORMATION

i. Actual Waiting List Information

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN, OR CLOSED	WAS THE WAITING LIST OPENED DURING THE PLAN YEAR?
Public Housing	Centrally managed, site-specific, by bedroom size	1,926	Partially open	Yes, by bedroom size as needed
Rental Assistance Demonstration Sites - PBV	Centrally managed, site-specific, by bedroom size	18,139	Partially open	Yes, by bedroom size as needed
Housing Choice Voucher – Project-Based	Centrally managed, site/region-specific, by bedroom size	26,063	Partially open	Yes, by bedroom size as needed
Housing Choice Voucher – Tenant-Based	Community-wide	2,743	Closed	No

DESCRIPTION OF DUPLICATION OF APPLICANTS ACROSS WAITING LISTS

Approximately 39.3% of applications are duplicates, representing families who have applied to two or more waiting lists.

ii. Actual Changes to Waiting List in the Plan Year

WAITING LIST NAME	DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST
Housing Choice Voucher – Tenant-Based	Reviewed and purged in Fall 2017. The Upland Housing Authority tenant-based HCV waiting list was merged with the HACSB tenant-based HCV waiting list in 2017.
Public Housing – Upland (Los Olivos)	Reviewed and purged in Fall 2017

D. INFORMATION ON STATUTORY OBJECTIVES AND REQUIREMENTS

i. 75% of Families Assisted are Very Low-Income

INCOME LEVEL	NUMBER OF LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED IN THE PLAN YEAR
80% - 50% Area Median Income	0
49% - 30% Area Median Income	0
Below 30% Area Median Income	0
TOTAL LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED	0

ii. Maintain Comparable Mix

BASELINE MIX OF FAMILY SIZES SERVED (UPON ENTRY TO MTW)					
FAMILY SIZE	OCCUPIED PUBLIC HOUSING UNITS	UTILIZED HCVs	NON-MTW ADJUSTMENTS	BASELINE MIX NUMBER	BASELINE MIX PERCENTAGE
1 Person	442	2,801	-	3,243	34.7%
2 Person	338	1,619	-	1,957	20.9%
3 Person	279	1,187	-	1,466	15.7%
4 Person	222	1,003	-	1,225	13.1%
5 Person	142	567	-	709	7.6%
6+ Person	183	569	-	752	8.0%
TOTAL	1,606	7,746	-	9,352	100%

DESCRIPTION OF JUSTIFICATION FOR ANY “NON-MTW ADJUSTMENTS” GIVEN ABOVE

N/A.

MIX OF FAMILY SIZES SERVED (IN PLAN YEAR)

FAMILY SIZE	BASELINE MIX PERCENTAGE	NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	34.7%	4,006	38.4%	10.7%
2 Person	20.9%	2,165	20.8%	-0.8%
3 Person	15.7%	1,651	15.8%	1.0%
4 Person	13.1%	1,246	11.9%	-8.8%
5 Person	7.6%	791	7.6%	0.0%
6+ Person	8.0%	679	6.5%	-19.1%
TOTAL	100%	10,538	100%	

DESCRIPTION OF JUSTIFICATION FOR ANY VARIANCES OF MORE THAN 5% BETWEEN THE PLAN YEAR AND BASELINE YEAR

Families are admitted to HACSB's MTW voucher program from a wait list which is sorted through a lottery system. The families served in FY 2018 reflect the families who were selected from the wait list and successfully located a unit to lease. The decrease in 6+ person families served in FY 2018 is believed to be related to difficulty locating larger units (3 or more bedrooms). HACSB will monitor the changes through FY 2019 and, if necessary, identify steps to maintain a comparable mix of family sizes served.

iii. Number of Households Transitioned to Self-Sufficiency in the Plan Year

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, the overarching definition for the families in these activities is a voluntary termination of housing assistance and other forms of government assistance due to an increase in income, education, savings, and/or employment 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 2018, a total of ## families transitioned to self-sufficiency through our activities. While some MTW activities contribute to the families' transition away from housing assistance more than others, we believe that the combined results of all our MTW activities has led to the growing number of transitions. In FY 2018 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.

MTW ACTIVITY NAME/NUMBER	NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF-SUFFICIENCY	MTW PHA LOCAL DEFINITION OF SELF-SUFFICIENCY
4 - Biennial and Triennial Recertifications	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.
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.
19 - Local Family Self-Sufficiency Program	2	Graduation from the Local FSS program.
20 - Term-Limited Lease Assistance Program	217	Termination of housing assistance and other forms of government assistance due to an increase in income and/or increased level of employment to transition to market-rate housing or homeownership in the five-year program timeframe.

MTW ACTIVITY NAME/NUMBER	NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF-SUFFICIENCY	MTW PHA LOCAL DEFINITION OF SELF-SUFFICIENCY
22 - Streamlined Lease Assistance Program	60	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.
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 the time of end of participation.
24 - Transition for Over-Income Families	141	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.
<i>HOUSEHOLDS DUPLICATED ACROSS MTW ACTIVITIES</i>	62	
TOTAL HOUSEHOLDS TRANSITIONED TO SELF-SUFFICIENCY	358	

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 believes it is unlikely that the activity will provide sufficient incentive or income retention to enable families to transition out of housing assistance. In FY 2018, zero families with biennial recertifications transitioned to self-sufficiency.

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 for families to transition out of housing assistance.

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 Local FSS program requires participating families to voluntarily exit the Housing Choice Voucher or Public Housing program in order to graduate from the Local FSS program and receive the balance of their escrow account. The two groups allow HACSB to compare the results and identify advantages and disadvantages of each program type. In FY 2018 the definition of self-sufficiency for this activity was changed to eliminate the requirement for families to have \$0 of assistance income at the time they leave housing assistance. The definition was revised to “graduation from the Local FSS program”. This modification will allow any Local FSS family who graduates and voluntarily exits housing assistance to be included in this count. Two families achieved self-sufficiency through the Local FSS program in FY 2018.

Implemented on January 1, 2012, Activity 20, the Five Year Lease Assistance Program, included households as of September 30th. HACSB continues to work with Loma Linda University to assist in the longitudinal study that examines participating families and their success over time. In FY 2018, 217 households transitioned to self-sufficiency through this activity.

Activity 22 - The Streamlined Lease Assistance Program, was implemented on February 1, 2015. 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. In FY 2018, 60 households transitioned to self-sufficiency from this activity.

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. In FY 2018, zero families achieved self-sufficiency through this activity.

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. 141 families were transitioned out of housing assistance in FY 2018 through this activity.

Section III: Proposed MTW Activities

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

This section provides HUD-required information detailing previously approved uses of MTW authority. The following pages include detailed information about ongoing MTW activities that were previously approved, with an update on any changes taking place in FY 2016. 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, on hold, 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. This activity was closed out through our FY 2019 Annual MTW Plan. This FY 2018 Annual MTW Report contains close-out reporting data for this activity.

1. Activity Description and Outcomes

With the flexibility provided through this activity, HACSB developed and adopted an investment policy for MTW funds that is consistent with California Government Code Section 53630 and/or HUD-approved investment criteria to the extent such policies are in compliance with applicable OMB circulars and other federal laws. HACSB invested only in securities authorized under state law that allowed the flexibility to invest productively, efficiently and securely. This activity enabled the Housing Authority to achieve a safer, more liquid portfolio that contained a competitive yield. Under California investment policies, HACSB was able to invest in stronger investment instruments with lower transaction costs, with the expectation of increasing overall investment returns.

Due to the implementation of the U.S. Department of Housing and Urban Development’s cash management provisions described in Notice PIH 2011-67, Restricted Net Position (RNP) balances were transitioned to HUD-held program reserves in FY 2016. As a result, we have limited funds on-hand. Because HACSB does not hold sufficient reserves to invest, the expected amount leveraged after implementation of the activity is \$0. This activity is now closed out.

Activity 2: Strategic Investment Policies CE #4: Increase in Resources Leveraged				
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.	\$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.	\$177,856 leveraged in FY 2018.	Yes, the outcome meets the benchmark for this metric.

2. Challenges and Strategy Revisions

None.

3. Measurement Revisions

Standard Metric CE #4 was added through our FY 2015 Annual MTW Report in accordance with HUD's comments on our FY 2015 Annual MTW Plan.

4. Changes to Data Collection Methodology

None.

Activity 4: Biennial and Triennial Recertifications

This activity was initially approved through our FY 2009 MTW Annual Plan as a pilot program for elderly and disabled households with no other adult members and no earned income who are participating in the Public Housing and Housing Choice Voucher programs. A modification approved through our FY 2012 Annual MTW Plan expanded the activity to apply to all families in both 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. Triennial recertifications for elderly-only fixed-income families were added through our FY 2019 Annual MTW Plan. That plan also included authorization to apply this activity to participants of the Veterans Affairs Supportive Housing (VASH) program.

1. Activity Description and Outcomes

Current regulation requires annual recertifications of income and family composition for most participants of the Public Housing and Housing Choice Voucher programs. This activity allows HACSB to conduct recertifications of MTW and VASH households biennially or triennially. Elderly-only fixed-income families are recertified triennially; all other families are recertified biennially. The triennial recertification component has not yet been implemented and is not included in the following reported outcomes.

This activity has resulted in significant cost and staff time savings, with the benchmarks for this activity met in most years since implementation. HACSB's MTW activity 22: Streamlined Lease Assistance, was implemented in early 2015, and has resulted in some increases to these measurements since then. The increases were primarily associated with staff time spent explaining the new activity to families and responding to questions from participants and landlords. In FY 2018, time savings were again realized.

In FY 2018 HACSB underwent an internal review and realignment process to identify opportunities to improve efficiency within the HCV program. As a result of that process, departmentalized recertification processes were changed to full case management. Under the previous departmentalized processes, specialized teams such as wait list, intake, portability, and compliance managed specific aspects of case management. Our review indicated that some efficiencies and improved customer service could be achieved by moving to full case management, with each housing specialist managing all aspects of the housing assistance processes. As a result, we anticipate time savings in the coming years. HACSB intends to re-benchmark this activity in FY 2019, when post-realignment data is available.

Activity 4: Biennial Recertifications CE #1: Agency Cost Savings¹				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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).	\$462,964 \$445,954 staff cost + \$17,010 postage cost Staff Cost Calculation: 13,320 hours X \$33.48	\$231,482 per year \$222,977 staff cost + \$8,505 postage cost Staff Cost Calculation: 6,660 hours X \$33.48 per hour	\$217,971 in FY 2018 \$209,652 staff cost + \$8,319 postage cost Staff Cost Calculation: 6,262 hours X \$33.48 per hour	Yes, the outcome meets the benchmark for this metric.

Activity 4: Biennial Recertifications CE #2: Staff Time Savings²				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff hours to conduct recertifications.	13,320 total hours 9,000 files x 1.48 hours/file.	6,660 total hours	6,262 total hours in FY 2018 Staff Time Calculation: 4,571 recertifications performed in PH and HCV programs X 1.37 hours per recertification	Yes, the outcome meets the benchmark for this metric.

¹ The baseline and benchmark values for this metric were revised in HACSB's FY 2017 Annual MTW Report using a comparison group of non-MTW recertifications to re-determine the time required to process recertifications.

² The baseline and benchmark values for this metric were revised in HACSB's FY 2017 Annual MTW Report using a comparison group of non-MTW recertifications to re-determine the time required to process recertifications.

Activity 4: Biennial Recertifications CE #5: Increase in Tenant Rent Share				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is \$403.	The increase is believed to be the result of other MTW activities.

Activity 4: Biennial Recertifications SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 biennial recertification households in FY 2018 is \$7,208.	The increase 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	Baseline³	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 in FY 2016 is 184 (19%).	The number of heads of household employed full-time is not expected to change as a result of this activity.	Heads of households employed full-time in FY 2018 is 1,189 (16%).	No, the outcome does not meet the benchmark for this metric. The outcome is believed to be the result of other MTW activities and/or additional data available in the outcome year compared to the baseline year.
	Percentage of total work-able households employed full-time in FY 2016 is 38%.	The percentage of work-able heads of household employed full-time is not expected to change as a result of this activity.	Percentage of total work-able households employed full-time in FY 2018 is 28%.	

³ Pre-implementation data for categories 1, 2, 3, 4, and 6 of this metric is unavailable. Baseline figures represent FY 2016 data. Baseline data from 2016 reflects 10% of all biennial reexamination families and 13% of work-able biennial reexamination families.

Activity 4: Biennial Recertifications - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(2) Employed Part-Time	Head(s) of households employed part-time in FY 2016 is 105 (11%).	The number of heads of household employed part-time is not expected to change as a result of this activity.	Heads of households employed part-time in FY 2018 is 709 (9%).	No, the outcome does not meet the benchmark for this metric. The outcome is believed to be the result of other MTW activities and/or additional data available in the outcome year compared to the baseline year.
	Percentage of total work-able households employed part-time in FY 2016 is 19%.	The percentage of work-able heads of household employed part-time is not expected to change as a result of this activity.	The percentage of work-able heads of households employed part-time in FY 2018 is 14%.	
(3) Enrolled in an Educational Program	Head(s) of households enrolled in an educational program in FY 2016 is 46 (5%).	The number of heads of household enrolled in an educational program is not expected to change as a result of this activity.	Heads of households enrolled in an educational program in FY 2018 is 328 (4%).	No, the outcome does not meet the benchmark for this metric. The outcome is believed to be the result of other MTW activities and/or additional data available in the outcome year compared to the baseline year.
	Percentage of total work-able households enrolled in an educational program in FY 2016 is 8%.	The percentage of work-able heads of household enrolled in an educational program is not expected to change as a result of this activity.	The percentage of work-able heads of households enrolled in an educational program in FY 2018 is 7%.	
(4) Enrolled in Job Training Program	Head(s) of households enrolled in a job training program in FY 2016 is 9 (1%).	The number of heads of household enrolled in a job-training program is not expected to change as a result of this activity.	Heads of households enrolled in job training in FY 2018 is 81 (1%).	Yes, the outcome meets the benchmark for this metric. The number of heads of household increased but the percentage did not.
	Percentage of total work-able households enrolled in a job training program in FY 2016 is 2%.	The percentage of work-able heads of household enrolled in a job-training program is not expected to change as a result of this activity.	The percentage of work-able heads of households enrolled in job training in FY 2018 is 1%.	No, the outcome does not meet the benchmark for this metric. The outcome is believed to be the result of other MTW activities and/or additional data available in the outcome year compared to the baseline year.

Activity 4: Biennial Recertifications - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(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 is 6,678 (72.8%).	No, the outcome does not meet the benchmark for this metric. The outcome is believed to be the result of other MTW activities and/or additional data available in the outcome year compared to the baseline year.
	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 is 51.6%.	
6) Other	Head(s) of households engaged in other activities in FY 2016 is 27 (3%).	The number of heads of household engaged in other activities is not expected to change as a result of this activity.	Heads of households engaged in other activities in FY 2018 is 238 (3%).	Yes, the outcome meets the benchmark for this metric. The number of heads of household increased but the percentage did not.
	Percentage of total work-able households engaged in other activities in FY 2016 is 5%.	The percentage of work-able heads of household engaged in other activities is not expected to change as a result of this activity.	The percentage of work-able heads of households engaged in other activities in FY 2018 is 5%.	

Activity 4: Biennial Recertifications
SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving TANF assistance.	Number of households receiving TANF in FY 2011 prior to full implementation of the activity is 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 2017 is 1,922 (21%).	Yes, the outcome meets the benchmark for this metric. The outcome is believed to be the result of other MTW activities.

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 pre-implementation data 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 2018 is 0.	Yes, the outcome meets the benchmark for this metric.

2. Challenges and Strategy Revisions

None.

3. Measurement Revisions

The time study methodology was revised for the FY 2018 MTW Report. The methodology used is more consistent with the methodology originally employed for the baseline time study.

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.

Pre-implementation baseline data for standard metric SS #8 is unavailable. In accordance with written instruction from HUD, data from FY 2015 was used to establish the baseline for this metric.

4. Changes to Data Collection Methodology

None.

Activity 5: Simplified Income Determination

This activity was approved as “Local Verification Policies” in our FY 2009 Annual MTW Plan and was implemented on October 1, 2009. Our FY 2019 Annual MTW Plan included a modification that retitled this activity and merged the functions of the following activities:

- Activity 5 – Local Verification Policies (this activity)
- Activity 6 – Elimination of Assets (originally approved in our FY 2009 Annual MTW Plan and implemented on October 1, 2009)
- Activity 9 – Elimination of Earned Income Disallowance (originally approved in our FY 2009 Initial Annual MTW Plan and effective on October 1, 2009, for participants in the Housing Choice Voucher and Public Housing programs)
- Activity 17 – Local Income Inclusions (originally approved in our FY 2011 Annual MTW Plan and implemented on May 1, 2011. The activity was modified through HACSB’s FY 2015 MTW Plan)

As a result of the merge, activities 6, 9, and 17 have been closed out as separate activities and the HUD-approved flexibilities of those activities are hereafter included in this activity.

Our FY 2019 Annual MTW Plan also included authorization to apply this activity to participants of the Veterans Affairs Supportive Housing (VASH) program. All aspects of this activity except the elimination of the Earned Income Disallowance apply to VASH households.

1. Activity Description and Outcomes

This activity includes four components: local verification policies, elimination of assets, elimination of the Earned Income Disallowance, and local policies for income inclusions and exclusions. The activity applies to MTW and VASH households. The elimination of the Earned Income Disallowance does not apply to VASH households.

Local Verification Policies

The verification standard used by HACSB was modified in FY 2011 to establish the following local verification hierarchy:

1. Upfront Income Verification (UIV) using HUD’s Enterprise Income Verification (EIV) is the highest standard of verification.
2. Documents provided by the household and observed to be satisfactory to verify income are the second tier of verification.
3. Third-party written verification is requested as the third tier of verification if additional verification is necessary.
4. Third-party oral verification is permitted as the lowest ranking type of income verification.

Applicant verifications may not be more than 120 days old (from the date received) at the time of orientation. For participants, verifications remain valid for six months (180 days) from the date received.

Elimination of Assets

Assets are fully excluded from the calculation of annual income for the purpose of determining the tenant rent portion. Asset information is verified at initial eligibility for the purpose of determining income eligibility for assistance. Thereafter, information related to assets is not collected and income from assets is not considered as part of the income/rent calculation formula.

Elimination of Earned Income Disallowance

HACSB has eliminated the HUD Mandatory Earned Income Disallowance (EID) from the calculation of total tenant payment.

Local Income Inclusions and Exclusions

HACSB has established local policies 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. Foster children and foster adults are considered family members (not household members), and a dependent deduction is provided for foster children (in the Transitional Assistance for MTW Families programs only);
- 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).

Activity 5: Simplified Income Determination CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 combined costs: <ul style="list-style-type: none"> • of income verification process • to collect and calculate asset income for both PH and HCV • of staff time spent to process EID 	\$296,512 in 2009	\$160,117 Agency Cost Calculation: 4,580 hours for verifications X \$34.96 staff cost per hour \$0 for calculation of assets or application of the EID	\$118,235 in FY 2018 Staff Cost Calculation: 3,382 hours X \$34.96 staff cost per hour	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 5: Simplified Income Determination CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours to conduct verifications	8,483.4 total hours 6,947 hours for verifications (1,133 hours in Public Housing; 5,814 in HCV) 1,478 hours to calculate assets 58.4 hours to process the EID	4,580 total hours Staff Time Calculation: 705 hours to process verifications in PH; 3,875 in HCV. 0 hours for calculation of assets or application of EID	3,382 total hours in FY 2018	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 5: Simplified Income Determination CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Total combined average error rate in: <ul style="list-style-type: none"> • completing verifications • calculating assets • processing the earned income disallowance 	Average error rate of prior to implementation of the activity is 44%. (FY 2011-2012 used to establish the baseline for this metric)	The average error rate is expected to be less than 44%.	The actual average error rate in FY 2018 is 0%.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 5: Simplified Income Determination CE #5: Increase in Tenant Rent Share				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 and/or local income inclusions.	Average tenant rent share 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 is not more than \$720.	The actual average tenant rent share in FY 2018 is \$596.	Yes, the outcome meets the benchmark for this metric.

2. Challenges and Strategy Revisions

None.

3. Measurement Revisions

Through our FY 2019 Annual MTW Plan, HACSB received approval to merge four previously approved MTW activities under this activity with the title “Simplified Income Determination”. Beginning with this 2019 Annual MTW Report, the outcomes of these activities are reported as combined totals.

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 7: Controlled Program Moves

This activity was approved in our FY 2009 MTW Annual Plan and implemented on February 1, 2010. This activity was closed out through our FY 2019 Annual MTW Plan. This FY 2018 Annual MTW Report contains close-out reporting data for this activity.

1. Activity Description and Outcomes

This activity allowed HACSB to limit voluntary program moves for Housing Choice Voucher participants to no more than one time in two years, and only upon verification from the current landlord that the tenant is in good standing. Exceptions to this policy were made for moves related to self-sufficiency, reasonable accommodation, and domestic violence situations.

This activity resulted in a significant decrease in agency costs and staff time spent related to processing voluntary moves. In FY 2017, both costs and time spent reflected approximately a 64% decrease over the baselines. The staff time spent per move was 42% lower in FY 2017 than the baseline value. However, because the total number of moves did not decrease as much as was anticipated, the benchmarks for staff time and cost savings were not reached.

As with all of our MTW activities, HACSB performed internal monitoring of aspects of the Controlled Program Moves activity beyond what was reported through our annual MTW reports. We found that, while this activity resulted in cost and time savings related directly to a reduction in the number of moves processed annually, it also resulted in additional administrative burden in other areas. For example, we identified an increase in the number of moves requested as a reasonable accommodation and/or under the provisions of the Violence Against Women Act (VAWA) after implementation of this activity. Additionally, the two-year lease requirement caused other challenges, especially for families nearing the end of their participation in the Term-Limited Lease Assistance Program. As a result, we eliminated the two-year lease requirement and closed out this activity through our FY 2019 Annual MTW Plan.

**Activity 7: Controlled Program Moves
CE #1: Agency Cost Savings**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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)	<p>\$171,933 Annually</p> <p>Staff Cost Calculation: \$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)</p>	<p>\$56,217 Annually</p> <p>Staff Cost Calculation: \$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)</p>	<p>\$62,683 in FY 2018</p> <p>Staff Cost Calculation: \$24,297 for moves (1,695 hours X \$34.96 average staff cost per hour). \$3,426 for port-outs (98 hours X \$34.96 average staff cost per hour).</p>	<p>No, the outcome does not meet the benchmark for this activity.</p> <p>However, a significant decrease was realized (63.54%).</p>

Activity 7: Controlled Program Moves CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours annually to process program moves (including out-bound portability)	4,918 hours annually Staff Time Calculation: 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 Staff Time Calculation: 1,448 hours spent to process moves annually. 160 hours to process outbound ports. The benchmark will be the same for all forthcoming years.	1,793 hours in FY 2017 Staff Time Calculation: 1,695 hours spent to process moves for FY 2018 (2.29 hours per move X 740 moves) 98 hours to process outbound portability for FY 2017 (99 port outs X .99 hours per port out)	No, the outcome does not meet the benchmark for this metric. However, a significant decrease was realized (63.5%).

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 FY2017, staff hours spent on inbound portability participants were reduced by 88% over the baseline year. All benchmarks for this activity have been fully or partially met since FY 2010.

Activity 8: Local Policies for Portability CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.	\$21,936 in FY 2018 Staff Cost Calculation: 627.46 hours X \$34.96 average staff cost per hour	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 8: Local Policies for Portability CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total hours of staff time spent annually to process in-bound portability	2,004 hours in FY 2009	1,002 hours in FY 2010 and beyond.	627.46 hours in FY 2018 Staff Time Calculation: 4.58 hours per port-in x 137 port-ins in FY 2018.	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 on HACSB's 2015 Annual MTW Plan, the previously reported standard metric SS #1: Increase in Household Income, was removed, and standard metric CE #1: Agency Cost Savings, was added through our FY 2015 Annual MTW Report.

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 the MTW programs. There were no requests for hardship exemption from the minimum rent in FY 2018.

In FY 2014, 1,205 families were paying the HACSB \$125 minimum rent. As of 2018, 996 of these families are still active, and 791 of them are no longer paying the minimum rent. The average total household income for these families has increased by \$12,020, while their average earned income has increased by \$8,749. These increases demonstrate the positive changes among families who were paying the minimum rent in FY 2014.

Activity 10: Minimum Rent CE #5: Increase in Tenant Rent Share				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 is \$155.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 10: Minimum Rent SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 \$774.	The average earned income for households with TTP less than or equal to \$125 in FY 2018 is \$1,342.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 10: Minimum Rent SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline⁴	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.

⁴ Pre-implementation data for categories 1, 2, 3, 4, and 6 of this metric is unavailable. Baseline figures represent FY 2016 data. Baseline data from 2016 reflects 7% of all minimum rent families and 7% of work-able minimum rent families.

Activity 10: Minimum Rent - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(1) Employed Full-Time	Head(s) of households employed full-time in FY 2016 is 6 (8%).	The number of heads of household employed full-time is not expected to change as a result of this activity.	Heads of households employed full-time in FY 2018 is 32 (7%).	The change in heads of household in this category may reflect more accurate reporting available through the larger sample size available in FY 2018 than was available for the FY 2016 baseline.
	Percentage of total work-able households employed full-time in FY 2016 is 9%.	The percentage of work-able heads of household employed full-time is not expected to change as a result of this activity.	Percentage of total work-able households employed full-time in FY 2018 is 6%.	
(2) Employed Part-Time	Head(s) of households employed part-time in FY 2016 is 16 (22%).	The number of heads of household employed part-time is not expected to change as a result of this activity.	Heads of households employed part-time in FY 2018 is 51 (12%).	The change in heads of household in this category may reflect more accurate reporting available through the larger sample size available in FY 2018 than was available for the FY 2016 baseline.
	Percentage of total work-able households employed part-time in FY 2016 is 22%.	The percentage of work-able heads of household employed part-time is not expected to change as a result of this activity.	Percentage of total work-able households employed full-time in FY 2018 is 11%.	
(3) Enrolled in an Educational Program	Head(s) of households enrolled in an educational program in FY 2016 is 8 (11%).	The number of heads of household enrolled in an educational program is not expected to change as a result of this activity.	Heads of households enrolled in an educational program in FY 2018 is 18 (4%).	The change in heads of household in this category may reflect more accurate reporting available through the larger sample size available in FY 2018 than was available for the FY 2016 baseline.
	Percentage of total work-able households enrolled in an educational program in FY 2016 is 12%.	The percentage of work-able heads of household enrolled in an educational program is not expected to change as a result of this activity.	Percentage of total work-able households enrolled in an educational program in FY 2018 is 4%.	

Activity 10: Minimum Rent - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(4) Enrolled in Job Training Program	Head(s) of households enrolled in a job training program in FY 2016 is 2 (3%).	The number of heads of household enrolled in a job-training program is not expected to change as a result of this activity.	Heads of households enrolled in a job training program in FY 2018 is 8 (2%).	The change in heads of household in this category may reflect more accurate reporting available through the larger sample size available in FY 2018 than was available for the FY 2016 baseline.
	Percentage of total work-able households enrolled in a job training program in FY 2016 is 3%.	The percentage of work-able heads of household enrolled in a job-training program is not expected to change as a result of this activity.	Percentage of total work-able households enrolled in a job training program in FY 2018 is 1%.	
(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 is 411 (80.6%).	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 is 83.2%	Yes, the outcome meets and exceeds the benchmark for this portion of this metric.
(6) Other	Head(s) of households engaged in other activities in FY 2016 is 9 (12%).	The number of heads of household engaged in other activities is not expected to change as a result of this activity.	Heads of households engaged in other activities in FY 2018 is 36 (8%).	The change in heads of household in this category may reflect more accurate reporting available through the larger sample size available in FY 2018 than was available for the FY 2016 baseline.
	Percentage of total work-able households engaged in other activities in FY 2016 is 12%.	The percentage of work-able heads of household engaged in other activities is not expected to change as a result of this activity.	Percentage of total work-able households engaged in other activities in FY 2018 is 9%.	

Activity 10: Minimum Rent SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number).	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of 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 is 160 (31.4%).	Yes, the outcome meets and exceeds the benchmark for this metric when measured by percentage of minimum rent households.

Activity 10: Minimum Rent SS #8: Households Transitioned to Self-Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 is 0.	Yes, the outcome meets the benchmark for this metric.

2. Challenges and Strategy Revisions

None.

3. Measurement Revisions

The benchmark for standard metric SS #1 (Increase in Household Income) was revised through this FY 2018 MTW Report. The previous benchmark of \$5,000 of earned income was unrealistic. Families paying the HACSB \$125 minimum rent can have a maximum total household income of \$5,000. On average from FY 2015 to FY 2017, minimum rent families had an average earned income of \$774. Therefore, HACSB anticipates that families paying the HACSB minimum rent of \$125 will have an average earned income of \$774.

The previously reported standard metric (SS #6: Reducing per Unit Subsidy Costs for Participating Households) was removed per HUD's request 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 primary objective of the activity is to achieve agency cost and staff time savings, and HACSB does not anticipate that these metrics will reflect a significant increase in positive outcomes in employment status, households removed from TANF, or households transitioned to self-sufficiency as a direct result of this activity.

Pre-implementation baseline data for standard metric SS #8 is unavailable. In accordance with written instruction from HUD, data from the first fiscal year for which this metric was reported (FY 2015) was used to establish the baseline. Additionally, we are unable to report fully on Standard Metric SS #3. In FY 2016 HACSB implemented a system to collect information about the employment status, education enrollment status, job training enrollment status, and other activity of all participants, and this system was used to establish baseline data for five of the six components of Standard Metric SS #3. Data collected in FY 2017 and future years will be used to report the outcomes for those five components.

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. A modification to this activity was proposed through our FY 2015 Annual MTW Plan, and per HUD's request was added to our FY 2017 Annual MTW Plan

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 1,441 available units (excluding RAD-PBV units).

Activity 11: Local Project-Based Voucher Program CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is \$687.72 There were no PBV Requests for Proposal in FY 2018. Cost calculation: 12 hours per contract X \$57.31/hour	Yes, the outcome meets and exceeds the benchmark for this activity.

Activity 11: Local Project-Based Voucher Program CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total 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 2018 is 12 hours per contract. There were no PBV Requests for Proposal in FY 2018.	Yes, the outcome meets the benchmark for this activity.

Activity 11: Local Project-Based Voucher Program HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 pre-implementation data is unavailable)	Expected households losing assistance/moving after implementation of the activity is 0.	Displacement was prevented for 1,180 households with income at or below 80% of AMI were residing in HACSB PBV units at the end of FY 2018.	Yes, the outcome meets the benchmark for this metric.

Activity 11: Local Project-Based Voucher Program Local Metric: Units of Project-Based Voucher Assistance Added to the HACSB Portfolio				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.	1,441 units in FY 2018. In total, HACSB has increased its PBV units to - 15.4% of its portfolio (1,441 non-RAD PBV/9,376 FY 2018 baseline MTW vouchers)	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) was 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.

Pre-implementation baseline data for standard metric HC #4 is unavailable. In accordance with written instruction from HUD, data from the first fiscal year for which this metric was reported (FY 2015) was used to establish the baseline.

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 admissions and recertifications in the Housing Choice Voucher program.

1. Activity Description and Outcomes

San Bernardino County is the largest county in the contiguous United States by area, and is larger than any of the nine smallest states combined. This activity allows HACSB to establish a local payment standard schedule that accurately reflects the various rental submarkets that exist within the county. 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 housing choice for the families we serve as they are now able to move to lower poverty regions with better job prospects, transportation, and schools.

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 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 8% since implementation. This change reflects an increase in the number of families that have chosen to lease in other areas of San Bernardino County. 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				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.	Total cost to calculate and apply payment standards prior to implementation of the local payment standards activity is \$15,754.70. Cost calculation: 470.43 hours X \$33.49 (2015 loaded labor rate) (FY 2015 data used to establish baseline)	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)	\$44,944 in FY 2018. Cost calculation: 1,342 hours X \$33.49 = \$8,105.	No, the outcome does not meet the benchmark for this activity. The number of HCV actions is increasing, in part due to the number of RAD converted units to which this activity now applies. HACSB will monitor this activity and adjust the benchmarks, if appropriate.

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total staff time to calculate and apply payment standards.	470.43 hours spent in FY 2015. (FY 2015 data used to establish baseline as pre-implementation data 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)	No change is anticipated in future years. (The baseline value is based on FY 2015, and the activity is fully implemented)	1,342 Hours spent in FY 2018.	No, the outcome does not meet the benchmark for this activity. The number of HCV actions is increasing, in part due to the number of RAD converted units to which this activity now applies. HACSB will monitor this activity and adjust the benchmarks, if appropriate.

Activity 12: Local Payment Standards HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 308. (FY 2015 data used to establish baseline)	The expected number of households losing assistance/moving after implementation of the activity is not expected to change.	In FY 2018, the number of households that would have lost assistance or had to move without this activity is 1,445.	Yes, the outcome meets the benchmark for this activity.

Activity 12: Local Payment Standards Local Metric: Average HAP Cost				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.	The average HAP of MTW units in FY 2018 is \$707.19.	No. However, the change is believed to be the result of increasing market rents and annual updates to HACSB's payment standards, which are unrelated to the flexibility authorized through this activity.

Activity 12: Local Payment Standards				
Local Metric: Households Able to Move from Areas of Poverty and/or Minority Concentration				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018, the percentage of households residing in submarkets 2 and 6 are: Submarket 2: 21% (4% decrease) Submarket 6: 14% (7% decrease)	Yes, the outcome meets the benchmark for this activity.

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 whose contract rent exceeds 110% of the HUD-Published Fair Market Rent (FMR); therefore, these households would not be able to lease the selected unit without the HACSB Local Payment Standard Activity. The baseline for this metric was corrected in FY 2018.

Pre-implementation baseline data for standard metrics CE #1, CE #2, and the first local metric is unavailable. In accordance with written instruction from HUD, data from the first fiscal year for which these metrics were reported (FY 2015) was used to establish the baseline.

The local metric “Average HAP Cost” was added through our FY 2015 Annual MTW Report to capture information about potential HAP savings related to this activity. This report is the first to include outcome data for this metric.

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 was 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. 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 2017, HACSB met and exceeded our benchmark cost savings of 13% with a decrease of nearly 31% from the baseline. Additionally, the total staff time (including time spent by contracted inspectors) has decreased by over 92%, primarily due to the outsourcing of inspections.

Activity 13: Local Inspection Policies CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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	\$515,402 in FY 2018 Calculation of Cost: \$56,062 Staff cost, \$459,081 contract costs, \$259 postage	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 13: Local Inspection Policies CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total time to complete 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.	1,674 hours in FY 2018.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 13: Local Inspection Policies CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in 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 pre-implementation data is unavailable)	The average error rate of inspections is not expected to change in future years. (Baseline data is post-implementation)	Actual error rate in FY 2018 is 1.3% (2 errors in 158 files).	Yes, the outcome meets and exceeds the benchmark for this metric.

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.

Pre-implementation baseline data for standard metric CE #3 is unavailable. In accordance with written instruction from HUD, data from the first fiscal year for which this metric was reported (FY 2015) was used to establish the baseline

The previously reported standard metric (HC #1: Additional Units of Housing Made Available) was removed per HUD's comments during the approval process for HACSB's 2015 Annual MTW Plan.

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 A.

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. The Maplewood Homes component of this activity was closed out and final year data reported in our FY 2017 Annual MTW Report. The remainder of the activity (the port-in component) was closed out through our FY 2019 Annual MTW Plan. This FY 2018 Annual MTW Report contains the final reporting data for this activity.

1. Activity Description and Outcomes

For inbound portability participants, all work-able household members (non-elderly and non-disabled) of the incoming family must be employed at least 15 hours per week within San Bernardino County or within a reasonable driving distance thereof prior to the execution of the HAP contract and throughout their participation in our program. If the family fails to maintain compliance with the work requirement, the previous employment income is 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.

Activity 15: Pilot Work Requirement SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 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 non-elderly and non-disabled port-in households subject to this activity is \$20,777. The average earned income of all new port-in households is \$8,465.	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

Unit of Measurement	Baseline⁵	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 with full-time employment prior to implementation of the activity is 6 (60%).	Expected head(s) of households with full-time employment after implementation of the activity is 10 (40%) by September 30, 2018.	Actual PWR head(s) of households with full-time employment in FY 2018 is 13 (12%).	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 60%.	Expected percentage of total work-able households with full-time employment after implementation of the activity is 40% by September 30, 2018.	Actual percentage of total work-able households with full-time employment in FY 2018 is 34%.	No, the outcome does not meet the benchmark for this metric.

⁵ Pre-implementation data for categories this metric is unavailable. Baseline figures represent FY 2016 data. Baseline data from 2016 reflects 7% of all non-elderly and non-disabled port-in families subject to the work requirement at port-in.

Activity 15: Pilot Work Requirement - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(2) Employed Part-Time	Head(s) of households with part-time employment prior to implementation of the activity is 4 (40%).	Expected head(s) of households with part-time employment after implementation of the activity is 10 (60%) by September 30, 2018.	Actual head(s) of households with part-time employment in FY 2018 is 7 (6%).	No, the outcome does not meet the benchmark for this metric.
	Percentage of total work-able households with part-time employment prior to implementation of activity is 40%.	Expected percentage of total work-able households with part-time employment after implementation of the activity is (60%) by September 30, 2018.	Actual percentage of total work-able households with part-time employment in FY 2018 is 16%.	No, the outcome does not meet 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 1 (10%).	Expected head(s) of households enrolled in an educational program is not expected to change as a result of this activity.	Actual head(s) of households enrolled in an educational program in FY 2018 is 1 (1%).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able households enrolled in an educational program prior to implementation of activity is 10%.	Expected percentage of total work-able households enrolled in an educational program is not expected to change as a result of this activity.	Actual percentage of total work-able households enrolled in an educational program in FY 2018 is 3%.	No, the outcome does not meet the benchmark for this metric.

Activity 15: Pilot Work Requirement - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(4) Enrolled in Job Training Program	Head(s) of households enrolled in job training program prior to implementation of the activity is 0 (0%).	Expected head(s) of households enrolled in job training program is not expected to change as a result of this activity.	Actual head(s) of households enrolled in job training program in FY 2018 is 0 (0%).	Yes, the outcome meets the benchmark for this metric.
	Percentage of total work-able households enrolled in job training program prior to implementation of activity is 0%.	Expected percentage of total work-able households enrolled in job training program is not expected to change as a result of this activity.	Actual percentage of total work-able households enrolled in job training program in FY 2018 is 0%.	Yes, the outcome meets the benchmark for this metric.
(5) Unemployed	Head(s) of households unemployed prior to implementation of the activity is 0 (0%).	Expected head(s) of households unemployed after implementation of the activity is no more than 10 (40%).	Actual head(s) of households unemployed in FY 2018 is 41 (38%).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able households unemployed prior to implementation of activity is 0%.	Expected percentage of total work-able households unemployed after implementation of the activity is no more than 40%.	Actual percentage of total work-able households unemployed in FY 2018 is 13%.	No, the outcome does not meet the benchmark for this metric.

Activity 15: Pilot Work Requirement - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(6) Other	Head(s) of households engaged in other activities, leading to positive outcomes in employment status prior to implementation of the activity is 1 (10%).	Expected head(s) of households engaged in other activities leading to positive outcomes in employment status after implementation of the activity is not expected to change as a result of this activity.	Actual head(s) of households engaged in other activities leading to positive outcomes in employment status in FY 2018 is 1 (1%).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able engaged in other activities, leading to positive outcomes in employment status prior to implementation of activity is 10%.	The percentage of total work-able households engaged in other activities leading to positive outcomes in employment status after implementation of the activity is not expected to change as a result of this activity.	Actual percentage of total work-able households engaged in other activities, leading to positive outcomes in employment status in FY 2018 is 3%.	No, the outcome does not meet the benchmark for this metric.

Activity 15: Pilot Work Requirement				
SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of port-in households receiving TANF assistance.	Number of new port-in households receiving TANF assistance prior to implementation of the activity is 5 (of 30, or 16.7%).	The expected number of new port-in households receiving TANF assistance after implementation of the activity is less than 30 (25% of port-in families).	The number of new port-in households receiving TANF is 15 (17%). The number of new non-elderly non-disabled port-in households subject to this activity receiving TANF is 6 (24%).	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				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self sufficiency services after implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of 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 2018 is 0.	Yes, the outcome meets the benchmark for this metric.

Activity 15: Pilot Work Requirement				
SS# 6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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	Expected average HAP for new non-elderly and non-disabled port-in households is \$617.13 (15% decrease).	Actual average HAP for new non-elderly and non-disabled port-in households in FY 2017 is \$816.	No, the benchmark has not yet been achieved. Although the average HAP increased from the baseline year, the change is related to standard annual increases in the payment standards.

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 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.

This activity continues to prepare residents for leasing in the private market. 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.

**Activity 18: Property Management Innovation
CE #1: Agency Cost Savings**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 in FY 2018 is \$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 2018 is \$25.35 per unit month.	No, the outcome does not meet the benchmark for this metric. Please see challenges and strategy revisions for more information.

**Activity 18: Property Management Innovation
CE #2: Staff Time Savings**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total 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 2.7 hours per hearing (50%).	Staff time spent on settlement conferences is 2 hours per conference (8 hours total / 4 settlement conferences).	Yes, the outcome meets and exceeds the benchmark for this metric.

2. Challenges and Strategy Revisions

As a result of the conversion of HACSB's Public Housing sites through the Rental Assistance Demonstration (RAD) program, families residing at the formerly Public Housing sites may choose to exercise mobility with a tenant-based voucher. This change has resulted in increased vacancies at the sites, which has increased total unit turnaround expenses. HACSB anticipated that the RAD conversions would result in increased unit turnover and requested from HUD authorization to apply its MTW Activity #7, Controlled Program Moves, to mitigate the impact of the conversions by permitting families to exercise mobility after two years of residence. This request was not granted. HACSB will continue to monitor turnaround expenses resulting from the increased unit turnover and determine if strategy revisions are needed.

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

Through our local Family Self-Sufficiency (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 2018, 51 families were enrolled in the program under the guidelines of this activity and 121 were enrolled under the traditional FSS program guidelines as a control group to compare with our local program participants. This activity has resulted in positive outcomes related to earned income and savings for participating families. Since 2014, the average earned income for Local FSS families has increased to 144% of the average earned income amount in 2014, and average escrow savings for these families has increased to 324% of the average escrow amount in 2015 since we began tracking it using the Standard Metric SS #2 in FY 2015.

Activity 19: Local FSS Program SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is \$14,365.	Yes, the outcome meets and exceeds the benchmark for this metric.

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is \$5,440.	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

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 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 2018 is 8 (26%).	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 2018 is 23% (6).	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 (continued)

(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 2018 is 9 (29%).	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 FY 2018 is 27% (7).	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 2018 is 7 (23%).	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 households enrolled in an educational program in FY 2018 is 19% (5).	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 2018 is 1 (3%).	No, the outcome does not meet 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 2018 is 4% (1).	Yes, the outcome meets the benchmark for this metric.

Activity 19: Local FSS Program - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(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 2018 is 10 (32%).	Yes, the outcome meets and exceeds the benchmark for this metric.
	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 2018 is 38% (10).	No, the outcome does not meet 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.	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 2018 is 3 (10%).	No, the outcome does not meet 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 in FY 2018 is 12% (3).	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 19: Local FSS Program				
SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
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 2018 is 9 (25%).	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 19: Local FSS Program				
SS# 5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self sufficiency services after implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase self-sufficiency	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 2018 is 51 (100%).	No, the benchmark has not yet been achieved. Although HACSB continues to recruit new FSS families, fewer families than previously anticipated have selected the Local FSS program.

Activity 19: Local FSS Program				
SS# 6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is \$752.	No, the outcome does not meet the benchmark for this metric.

Activity 19: Local FSS Program				
SS# 7: Increase in Tenant Rent Share				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is \$353.	No, the benchmark for this metric has not yet been achieved.

Activity 19: Local FSS Program SS #8: Households Transitioned to Self-Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 graduation from the Local FSS program, which consists of "Termination of housing assistance through the Public Housing or Housing Choice Voucher program due to self-sufficiency efforts."	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 2018 is 0. The cumulative total is 5. 0 in FY 2014 0 in FY 2015 2 in FY 2016 1 in FY 2017 2 in FY 2018	Yes, the outcome meets the benchmark for this metric in FY 2018.

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: Term-Limited Assistance Program (formerly Five Year)

This activity was approved in our FY 2011 Annual MTW Annual and was implemented on January 1, 2012. The activity was modified in our FY 2015, 2016, 2017, and 2018 Annual MTW Plans.

1. Activity Description and Outcomes

The goal of this 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. This activity applies to new non-elderly and non-disabled households admitted to the Housing Choice Voucher program from HACSB's waiting list, porting in from another jurisdiction, or exercising mobility from HACSB project-based voucher sites⁶. Families served through this activity are provided with up to five years of housing assistance and supportive services, with the possibility for extension through a hardship exception that may provide up to two years of additional assistance.

Summary of Modifications:

- FY 2015 Annual MTW Plan: included potential termination from the program for noncompliance with the household's Supportive Services Agreement.
- FY 2016 Annual MTW Plan: included an intake hardship exemption for extremely low-income and Triage Step 3 households and to expand the end-of-term hardship exemption. This modification was not implemented.
- FY 2017 Annual MTW Plan: added income-based subsidy calculation for new families joining the program, requirement for families to lease a unit with no more than one bedroom more or less than their voucher size, a post-assistance tracking survey process, and approval to implement incentives for families to move to areas of opportunity.
- FY 2018 Annual MTW Plan: added right-size unit restriction, limitation on the approvable amount of rent increases, and a limitation on the amount of subsidy paid on behalf of over-housed families.

Subsidy Calculation:

Families participating in the activity before November 1, 2017: the housing subsidy is set at 50% of the applicable payment standard for the unit selected by the family.

Families joining the activity on or after November 1, 2017: the subsidy calculation mirrors the Streamlined Fixed Assistance Program for New Non-Elderly/Non-Disabled Households. Under that calculation, the family's rent share (TTP) is the greatest of 30% of their gross income, the minimum rent, or baseline rent, for the duration of assistance.

A subsidy limitation also applies to these families. To encourage families to select units that are appropriately sized and most likely to be affordable to the family when coupled with the rental subsidy, HACSB will apply a subsidy limitation to over-housed families. Over-housed

⁶ Excludes legacy families exercising mobility from an HACSB Rental Assistance Demonstration (RAD) Project-Based Voucher (PBV) site.

families are those who have voluntarily selected and leased a unit that is larger than their voucher size. For example, a family with a two-bedroom voucher may choose to lease a three-bedroom unit. In these instances, the rental subsidy is capped by the applicable HACSB Local Payment Standard. However, in many cases the contract rent for the larger unit exceeds the contract rent for a unit that is the same size as the voucher issued to the family, which results in a greater family rent share than if the family had selected a smaller unit. Additionally, this scenario increases the HAP subsidy, often to the maximum allowable amount. Through this activity, HACSB will limit the maximum subsidy for over-housed families to the average subsidy rate for families that are not over-housed with the same size voucher.

Supportive Services:

During the term of assistance, HACSB also provides supportive services to the family through its Career Development Initiatives (CDI) department. Services include:

- Needs assessment at intake to determine whether families have the prerequisite resources needed to be successful in this program;
- Development of an individualized action plan for success;
- Access to three on-site Workforce Development Specialists through our contract with the County Workforce Development Department;
- Onsite access to a Family Stabilization Specialist and Employment Services Specialist through HACSB's contract with the San Bernardino County Transitional Assistance (welfare) Department;
- Access to other resources designed to provide the family with meaningful support and tools to enhance the family's chances for success.

Mobility:

For families who initially leased under this activity prior to September 21, 2015, and who port to another jurisdiction during the term of assistance, the term limit will continue to apply unless the household is absorbed by the receiving agency. For families who initially lease under this program on or after September 21, 2015, the administration of the voucher will be in accordance with the receiving PHA's policies in accordance with the Federal Register notice published September 21, 2015.

Hardship Exemptions:

HACSB recognizes that the expiration of assistance may present a hardship for some families, and has developed hardship exemptions in four categories:

1. Completion of Self-Sufficiency Activity: to allow the family to complete an educational, job training, or other approved self-sufficiency activity.
2. Unforeseen and Involuntary Loss of Income
3. Near-Elderly Family: if the head of household will reach age 62 no later than six (6) months after the end of term or any applicable extension, the household may request a transfer to HACSB's Streamlined Lease Assistance for Elderly/Disabled Families.
4. Other Reasons: this category allows HACSB to approve an extension of assistance for rare or unusual circumstances, such as PHA error.

To be eligible for a hardship exemption, the family must have complied with all requirements of the program, including the Supportive Services Agreement. Any approved extension shall not exceed two years, and shall be approved in increments of six or twelve months as determined by HACSB.

Total Term:

The total term of assistance under the program, including any approved hardship exemption, shall not exceed seven years.

Unit Size Limitation:

Households assisted under the Term-Limited Assistance Program must select a unit whose number of bedrooms is within one bedroom of the voucher size. For example, a family with a two-bedroom voucher may select a one-, two-, or three-bedroom unit. The intent of this component is to ensure that households choose a unit that is appropriately sized and affordable for their income situation. Over-housed families are also more costly to house than families in right-sized units. As a result, HACSB requested and received approval through its 2018 MTW Plan to require participant families to lease a unit that is the same size as their voucher. This modification has not been implemented as of the time of this writing, but HACSB may implement the change if other modifications do not result in families choosing to lease appropriately sized units.

Incentive to Move to Areas of High Opportunity:

HACSB may provide incentive to families in the program to move to areas of high opportunity, as identified by HACSB.

Post-Assistance Tracking Incentive:

HACSB has partnered with Loma Linda University (LLU) to utilize a survey system to collect information from Term-Limited Lease Assistance families at exit and annually for two years post-assistance. Although participation in the survey is voluntary, a monetary incentive is provided for families completing the survey. Families receive the incentive payment only upon completion of each survey. Details from the evaluation will be provided in our FY 2019 Annual MTW Report when the evaluation data is available from LLU.

Rent Increase Limitation:

Through its 2018 MTW Plan HACSB was granted authorization to limit the value of approvable rent increases to an amount less than the average value of previously approved rent increases. For example, the average value of rent increases approved in FY 2016 was 10% of the previous contract rent. This modification would permit HACSB to cap the rent increase at a value less than 10% of the previous contract rent. This modification will provide HACSB with a mechanism to slow the HAP cost increases resulting from continued rent increases. However, HACSB intends to implement this flexibility only if internal analysis demonstrates that it is necessary to ensure financial viability of the program.

It is important to note that the families participating in this activity are subject to HACSB's MTW Activity 24: Transition for Over-Income Families. Through that activity, families whose income exceeds the HUD-published 80% income limit are transitioned out of housing assistance. Fourteen (14) families in this program were transitioned out of housing assistance before the end of their five-year term through

that activity. The overlap of the Transition for Over-Income Families activity effectively caps the amount of progress toward economic self-sufficiency we can see within the five-year program, as the most successful families are removed from the program.

In FY 2017 the first families to join the Term-Limited Lease Assistance Program reached the end of their term and their housing assistance ended, unless the family qualified for a hardship extension. A small portion of these families requested and were approved for extensions of assistance through a hardship exemption, while most families transitioned out of housing assistance.

Activity 20: Term-Limited Lease Assistance Program				
SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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% to \$17,662 by 9/30/2015 and by 75% to \$21,317 by 9/30/2018.	Actual average earned income of affected families is \$20,395, a 67.4% increase over the baseline year.	No, the benchmark for 9/30/2018 has not yet been reached. However, the outcome is within 7.6% of the goal.

Activity 20: Term-Limited 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 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 is 205 (49.6%).	No. Please see notes following this table.
	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 is 49.6%.	Yes, the outcome meets the benchmark for this activity.
(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 is 97 (23.5%).	No. Please see notes following this table.
	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 is 23.5%.	No, the benchmark has not yet been reached. However, the outcome is within 6% of the goal.

Activity 20: Term-Limited Lease Assistance Program - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(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 is 60 (14.5%).	No. Please see note following this table.
	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 is 14% by FY 2015.	Actual percentage of total work-able enrolled in an educational program is 14.5%.	Yes, the outcome meets and exceeds the benchmark for this metric.
(4) Enrolled in Job Training Program	Head(s) of households enrolled in a job training program prior to implementation of the activity is 30 in year 1 of this activity.	Expected head(s) of households enrolled in a job training program after implementation of the activity is 50 by FY 2015.	Actual head(s) of households enrolled in a job training program is 29 (7.0%).	No, the benchmark has not yet been reached.
	Percentage of total work-able enrolled in a 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 a job training program after implementation of the activity is 7% by FY 2015.	Actual percentage of total work-able enrolled in a job training program is 7.0%.	Yes, the outcome meets the benchmark for this metric.
(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 is 111. (26.9%).	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 households unemployed is 26.9%.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 20: Term-Limited Lease Assistance Program - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(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 is 168 (40.7%).	Yes, the outcome meets and exceeds 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% 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 is 40.7%.	Yes, the outcome meets and exceeds the benchmark for this metric.

Note: The number of participants in the Term-Limited Lease Assistance (TLA) program varies from year to year. In FY 2018, the number of participants decreased substantially because a large number of families reached the end of their five-year term of participation and left the program. Additionally, HACSB’s leasing was slowed during the first part of the fiscal year while funding was uncertain. As a result of the decreased program size, the benchmark goals based on the number of families in each of the categories measured through SS #3 was not reached. Because the program size will continue to fluctuate based on funding levels and leasing success rates, the percentages of families in each of the categories measured through SS #3 more accurately reflects the outcomes of this activity.

Activity 20: Term-Limited Lease Assistance Program				
SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Percentage of Term-Limited Lease Assistance households receiving TANF assistance.	The number of Term-Limited Lease Assistance households receiving TANF assistance in year 1 of the activity is 267.	The expected number and percentage of Term-Limited Lease Assistance households receiving TANF is less than 600 (50%) ⁷ .	Actual number of Term-Limited Lease Assistance households receiving TANF after implementation of the activity is 172 (26.5%).	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 20: Term-Limited Lease Assistance Program				
SS# 5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self sufficiency services after implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households receiving services aimed to increase self-sufficiency (increase)	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 2018 is 100% (9789 households).	Yes, the outcome meets the benchmark for this metric.

⁷ The expected number of Term-Limited Lease Assistance (TLA) households receiving TANF was added to the benchmark and outcome for this metric beginning with HACSB's FY 2017 report. The number is not an accurate representation of the outcomes related to this activity due to fluctuations in the number of households participating in the program. Therefore, the percentage of TLA households receiving TANF is also provided in order to provide a more accurate representation of the changes.

**Activity 20: Term-Limited Lease Assistance Program
SS #8: Households Transitioned to Self-Sufficiency**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.
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 2018 is 217. The cumulative total is 422. (0 in FY 2014 6 in FY 2015 36 in FY 2016 163 in FY 2017 217 in FY 2018)	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.

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 and FY 2018 MTW plan.

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 current and new households not currently participating in or admitted to the Term-Limited Lease Assistance Program.

The rent for families in the Streamlined Lease Assistance program is calculated based on a percentage of gross annual income. A minimum rent and baseline rent also apply. The rent percentages were established based on analysis that included deductions and allowances permitted under traditional program regulations, and therefore no deductions or allowances are applied to the calculated rent amount calculated. Households participate in either fixed assistance or tiered assistance, based upon family type.

Fixed Assistance Program for Elderly/Disabled Households:

Families admitted prior to January 1, 2019: The family's rent share (TTP) is the greatest of 24% of their gross income, the minimum rent, or baseline rent for the duration of assistance.

Families admitted on or after January 1, 2019: The family's rent share (TTP) is the greatest of 30% of their gross income, the minimum rent, or baseline rent for the duration of assistance. This component is pending implementation, with an anticipated start date of January 1, 2019, or as soon as feasible thereafter.

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

The family's rent share (TTP) begins at the greatest of 30% of their gross income, the minimum rent, or baseline rent. The income percentage may increase by 3% at each subsequent biennial recertification to a maximum of 36%. HACSB intends to implement the additional rent tiers of 33% and 36% only if internal analysis demonstrates that it is necessary to ensure financial viability of the program without terminating assistance or serving fewer families. The rent tier structure was changed through our FY 2018 MTW Plan, and is being implemented beginning February 1, 2018. All families receive an automatic six-month hardship exemption which delays any change in tenant portion.

HACSB's minimum rent activity also 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.

Unit Size Limitation (Tenant-Based Voucher Programs Only):

In order to ensure that households choose a unit that is appropriately sized and affordable for their income situation, households assisted under the Streamlined Lease Assistance Program must select a unit whose number of bedrooms is within one bedroom of the voucher size. For example, a family with a two-bedroom voucher may select a one-, two-, or three-bedroom unit.

Our FY 2018 MTW Plan included approval to require families to select a unit that is the same size as their voucher. Families would not be permitted to lease an over-sized unit. This modification will be implemented only if the subsidy limitation modification described previously does not result in families selecting appropriately sized units.

Subsidy Limitation:

To encourage families to select units that are appropriately sized and most likely to be affordable to the family when coupled with the rental subsidy, HACSB intends to implement a subsidy limitation for over-housed families. These are families that have voluntarily selected and leased a unit that is larger than their voucher size. For example, a family with a two-bedroom voucher may choose to lease a three-bedroom unit. In these instances, the rental subsidy is capped by the HACSB Local Payment Standard. However, in many cases the contract rent for the larger unit exceeds the contract rent for a unit that is the same size as the voucher issued to the family, which results in a greater family rent share than if the family had selected a smaller unit. Additionally, this scenario increases the HAP subsidy, often to the maximum allowable amount of HACSB's Local Payment Standard. Through this activity, HACSB will limit the maximum subsidy for over-housed families to the average subsidy rate for families that are not over-housed with the same size voucher.

Rent Increase Limitation (voucher programs only):

HACSB's FY 2018 MTW Plan included approval to limit the value of approvable rent increases to an amount less than the average value of previously approved rent increases. For example, the average value of rent increases approved in FY 2016 was 10% of the previous contract rent. HACSB is permitted to cap the rent increase at a value less than 10% of the previous contract rent. HACSB intends to implement this flexibility only if internal analysis demonstrates that it is necessary to ensure financial viability of the program. At the time of this writing, this flexibility has not been implemented.

Activity 22: Streamlined Lease Assistance Program CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total cost of recertifications.	Total cost of recertifications prior to implementation of this activity is \$176,524 in FY 2014 \$165,492 staff cost + \$11,032 postage cost Staff Cost Calculation: 4,943 hours X \$33.48 per hour	\$158,872 in FY 2017 and beyond.	\$210,765 in FY 2018. \$202,721 staff cost + \$8,044 postage cost Staff Cost Calculation: 6,055 hours X \$33.48 per hour	No, the outcome does not meet the benchmark for this activity in FY 2018. The increase in time spent is related to an increase in the number of recertifications processed during FY 2018.

Activity 22: Streamlined Lease Assistance Program CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Total time to complete recertifications in staff hours.	Total amount of staff time dedicated to recertifications prior to implementation of the activity is 4,943 hours in FY 2014 Staff Time Calculation: 4,413 recertifications X 1.12 hours per recertification	4,449 hours in FY 2017 and beyond.	6,055 Hours in FY 2018. Staff Time Calculation: 4,420 recertifications performed in PH and HCV programs X 1.37 hours per recertification	No, the outcome does not meet the benchmark.

Activity 22: Streamlined Lease Assistance Program CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline⁸	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average error rate in completing recertifications as a percentage.	Average error rate of recertifications prior to implementation of the activity is 11%.	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 2018 is 3%.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 22: Streamlined Lease Assistance Program SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 is \$6,217.	Yes, the outcome meets and exceeds the benchmark for this metric.

⁸ Data from FY 2014 was used to determine the baseline percentage.

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

Unit of Measurement	Baseline⁹	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 in FY 2016 is 85 (11%).	Expected head(s) of households with full-time employment after implementation of the activity is 15% by FY 2021 (4% increase).	Actual heads of households with full-time employment is 980 (14%).	Yes, the outcome meets and exceeds the benchmark for this metric. The timeframe to achieve the benchmark has not yet been reached.
	Percentage of total work-able households employed full-time in FY 2016 is 29% (82).	Expected percentage of total work-able households with full-time employment after implementation of the activity is 36% by FY 2021 (7% increase).	Actual percentage of work-able households with full-time employment is 26% (834).	No, this outcome does not meet the benchmark for tis metric. The timeframe to achieve the benchmark has not yet been reached.

⁹ Pre-implementation data for categories 1, 2, 3, 4, and 6 of this metric is unavailable. Baseline figures represent FY 2016 data. Baseline data from 2016 for parts 1, 2, 3, 4, and 6 reflects 8% of all Streamlined Lease Assistance families and 8% of work-able Streamlined Lease Assistance families.

Activity 22: Streamlined Lease Assistance Program - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(2) Employed Part-Time	Head(s) of households employed part-time in FY 2016 is 77 (10%).	No change is anticipated. Some heads of household will move from unemployment to part-time employment, and others will move from part-time to full-time employment.	Actual heads of households with part-time employment is 615 (9%).	No, this outcome does not meet the benchmark for this metric in percentage terms but exceeds the standard in head of household count.
	Percentage of total work-able households employed part-time in FY 2016 is 22% (64).	No change is anticipated. Some heads of household will move from unemployment to part-time employment, and others will move from part-time to full-time employment.	Actual percentage of work-able households with part-time employment is 14% (456).	No, this outcome does not meet the benchmark for this metric.
(3) Enrolled in an Educational Program	Head(s) of households enrolled in an educational program in FY 2016 is 34 (4%).	No change is anticipated. This activity is expected to result in employment changes, but no changes to educational activity.	Actual heads of households enrolled in an educational program is 269 (4%).	Yes, the outcome meets the benchmark for this metric.
	Percentage of total work-able households enrolled in an educational program in FY 2016 is 9% (27).	No change is anticipated. This activity is expected to result in employment changes, but no changes to educational activity.	Actual percentage of work-able households enrolled in an educational program in FY 2017 is 7% (209).	No, this outcome does not meet the benchmark for this metric in percentage terms.
(4) Enrolled in Job Training Program	Head(s) of households enrolled in a job training program in FY 2016 is 5 (1%).	No change is anticipated. This activity is expected to result in employment changes, but no changes to job training activity.	Actual heads of households enrolled in a job training program is 64 (1%).	Yes, the outcome meets the benchmark for this metric.
	Percentage of total work-able households enrolled in a job training program in FY 2016 is 2% (5).	No change is anticipated. This activity is expected to result in employment changes, but no changes to job training activity.	Actual percentage of work-able households enrolled in a job training program in FY 2017 is 1% (38).	No, this outcome does not meet the benchmark for this metric in percentage terms.

Activity 22: Streamlined Lease Assistance Program - SS #3: Increase in Positive Outcomes in Employment Status (continued)

(5) Unemployed	Potential future SLA head(s) of households unemployed prior to implementation of the activity in FY 2014 is 7,103 of 9057 (78.4%)	Expected head(s) of households unemployed after implementation of the activity is 6,738 (74.4%) by FY 2021 (4% decrease).	Head(s) of households unemployed is 6,258 (75.5%).	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% (2,655 of 4,425)	Expected percentage of total work-able households unemployed after implementation of the activity is 53% by FY 2021 (7% decrease).	Percentage of total work-able households unemployed is 55.3%.	Yes, the outcome meets and exceeds the benchmark for this metric.
(6) Other	Head(s) of households engaged in other activities in FY 2016 is 18 (2%).	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 heads of households participating in other is 201 (3%).	Yes, the outcome meets and exceeds the benchmark for this metric.
	Percentage of total work-able households engaged in other activities in FY 2016 is 5% (15).	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 work-able households participating in other activities is 5% (148).	No, this outcome does not meet the benchmark for this metric.

Activity 22: Streamlined Lease Assistance Program SS# 4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of 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 is 1,702 (20.5%) of current Streamlined Lease Assistance households.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 22: Streamlined Lease Assistance Program SS# 6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 FY 2018 is \$721.	No. However, average contract rents are increasing, causing HAP amounts to also increase. The average CR increased \$55 between FY 2017 and 2018. During the same timeframe, average HAP subsidy decreased by \$7.

**Activity 22: Streamlined Lease Assistance Program
SS# 7: Increase in Tenant Rent Share**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is \$392.	Yes, the outcome meets and exceeds the benchmark for this metric.

**Activity 22: Streamlined Lease Assistance Program
SS #8: Households Transitioned to Self-Sufficiency**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is 60. Cumulative total is 115. (11 in FY 2015 29 in FY 2016 15 in FY 2017 60 in FY 2018)	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.

Additionally, we are unable to report fully on Standard Metric SS #3. In FY 2016 HACSB implemented a system to collect information about the employment status, education enrollment status, job training enrollment status, and other activity of all participants, and this system was used to establish baseline data for five of the six components of Standard Metric SS #3. Data collected in FY 2017 and future years will be used to report the outcomes for those five components.

4. Changes to Data Collection Methodology

None.

Activity 23: No Child Left Unsheltered

This activity was proposed and approved via HACSB's FY 2014 Annual MTW Plan and implemented on April 1, 2015 and modified via our FY 2018 Annual MTW Plan.

1. Activity Description and Outcomes

This activity 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 addresses the critical needs of unsheltered families in the county by offering Housing Choice Voucher assistance to families who are identified through our partnerships as eligible unsheltered homeless families with children. The program also provides participating 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). These 40 housing choice vouchers will be made available to eligible families meeting the criteria under this program. 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 shown 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

Families housed through this activity typically have significant challenges in locating housing through the traditional tenant-based voucher program. As the property owner in this program, HACSB has the ability to house these vulnerable families 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.

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. The rental subsidy is determined using the Streamlined Lease Assistance program methodology, with the assisted family typically paying a fixed percentage of their gross income toward rent.

HACSB contracted with Loma Linda University to identify the effects of the NCLU activity. Families joining the program tended to come in through local school systems or a homeless liaison. Though the initial results are varied as this is a more vulnerable population, residents did slowly begin to settle in a create goals aimed towards self-sufficiency. Over time, goals began to focus on moving out of the activity and on their children’s overall well-being. Also of note, many of the children often begin to attend school more regularly with many parents attributing this to their inclusion in the NCLU program.

Activity 23: No Child Left Unsheltered CE #4: Increase in Resources Leveraged				
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 \$80,750 in FY 2018.	Yes, the outcome meets and exceeds the benchmark for this metric.

Activity 23: No Child Left Unsheltered SS #8: Households Transitioned to Self-Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.
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).	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 2018 is 0.	Yes, the outcome meets the benchmark for this metric.

Activity 23: No Child Left Unsheltered HC #3: Decrease in Wait List Time				
Unit of Measurement	Baseline¹⁰	Benchmark	Outcome	Benchmark Achieved?
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.	The average applicant time on wait list for NCLU families is 1.96 months (58.85 days).	The average applicant time on wait list for NCLU families is not expected to change in future years, as this activity is already fully implemented.	The average application wait time in FY 2018 is 2.76 months (83 days).	Yes, the outcome meets the benchmark for this activity; no reduction in wait list time was anticipated, but some fluctuations were expected.

¹⁰ Pre-implementation data for this metric is unavailable. Baseline figure represents FY 2016 data.

Activity 23: No Child Left Unsheltered				
HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.	31 NCLU households received services aimed to increase housing choice in FY 2018 (100% of NCLU households active during the FY).	Yes, the outcome meets the benchmark for this metric.

Activity 23: No Child Left Unsheltered				
Local Metric: Households Housed through This Activity				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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.	31 households were housed through this activity in FY 2018. (7 new in FY 2018)	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.

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 over the HUD-published 80% income limit (“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 or locating alternate housing.

Elderly, disabled and homeownership families are exempt from this activity. The transition period began 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, the family is no longer 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.

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 2018 is 141. (141 voucher and 0 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.

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

1. Activity Description and Outcomes

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 with 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 contains 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 are within one two-story building and contain two elevators. 10 of the 50 units in Phase I are reserved as MHSA units and carry an age restriction of 60 years old. The property operates as affordable housing for seniors. For the 10 MHSA units, an elderly (senior) individual is 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 is defined as one who is 55 years of age or older in order to meet the City of Yucaipa's senior housing requirements.

Phase I of the Horizons at Yucaipa senior development was completed in the Spring of 2017 and was occupied by May of 2017. Pre-leasing activities which began in the summer of 2016 provided enough eligible candidates to fill all affordable housing units (40) and establish a waiting list of potential new tenants. The Department of Behavioral Health (DBH) assisted in identifying the tenants for the 10 MHSA units.

**Activity 25: Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing
HC #4: Displacement Prevention**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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. Units designated for seniors 55 years of age and older.	Zero (0).	Zero (0).	Zero (0).	Yes, the outcome meets the benchmark for this metric.

**Activity 25: Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing
HC #5: Increase in Resident Mobility**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity (number). This number may be zero.	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number).	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households residing in PBV units at Horizons at Yucaipa Senior Housing.	Zero (0).	FYE 2016: Zero (0). FYE 2017: Forty-Nine (49).	49 households resided in PBV units at Horizons at Yucaipa Senior Housing (45 as of 9/30/2018). The occupancy rate for FY 2018 was 96.1%.	Yes, the outcome meets the benchmark for this metric.

Activity 25: Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing
Local Metric: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	Actual housing units of this type after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of new housing units made available for households at or below 80% AMI as a result of the activity. Units designated for seniors 55 years of age and older.	Zero (0).	FYE 2016: Zero (0). FYE 2017: Forty-Nine (49).	Forty-nine new housing units were made available in FY 2017 and continue to be available to low-income households in FY 2018.	Yes, the outcome meets the benchmark for this metric.

Activity 25: Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing
Local Metric: Seniors 55 to 60 years of age housed through this activity

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of seniors 55 to 60 years of age housed through this activity.	Number of seniors 55 to 60 years of age housed through this activity prior to implementation of the activity.	Expected number of seniors 55 to 60 years of age housed through this activity after implementation of the activity.	Actual number of seniors 55 to 60 years of age housed through this activity after implementation of the activity.	Whether the outcome meets or exceeds the benchmark.
Number of seniors 55 to 60 years of age housed in PBV units at Horizons at Yucaipa Senior Housing.	Zero (0).	FYE 2016: Zero (0). FYE 2017: Thirty-Nine (39) in Phase I.	39 households age 55-60 resided in PBV units at Horizons at Yucaipa Senior Housing during FY 2018.	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.

Activity 26: Local Disaster Short-Term Rental Assistance Program

In August 2016 the massive Blue Cut Fire burned more than 36,000 acres in the Cajon pass area of San Bernardino County. The fire caused the complete shutdown of the Interstate 15 freeway and railroad lines, mandatory evacuations of an estimated 82,000 persons in at least six cities, and destroyed 105 homes and 216 minor structures¹¹. In the immediate aftermath, approximately seventy families displaced by the fire were in need of temporary assistance to stabilize their housing situation.

The Blue Cut Fire illustrated the need for HACSB to have in place a mechanism to provide temporary housing assistance to families in the event of certain local disasters. This proposed activity is designed to meet that need.

1. Description of the MTW Activity

Through this activity HACSB will implement a short-term rental assistance program to provide temporary housing choice voucher assistance to families displaced as the result of a local disaster. Except as noted below, HACSB's policies for the Housing Choice Voucher Program shall apply to the Local Disaster Short-Term Rental Assistance Program.

Determination of Local Disaster:

Assistance in this program will be limited to families displaced as the direct result of a local disaster. A local disaster is an event that occurs within the County of San Bernardino and may include a natural disaster such as an earthquake, fire, flood, or storm, an act of terrorism, or other event as determined by HACSB. The qualification of a local disaster would be declared by HACSB through a resolution of its governing board.

Wait List:

HACSB will maintain a separate wait list for this activity. The wait list will be opened only when a local disaster is declared through a resolution of HACSB's governing board and only to individuals displaced as a direct result of the local disaster.

This program is not a set-aside. No vouchers will be reserved for this activity. Rather, the funding source will be the MTW Block Grant. Assistance provided through this activity may be offset by a decrease in the number of families served through the Housing Choice Voucher Program. However, because this activity will provide short-term assistance to families, any potential offset would be minimal and take place through normal attrition within the program. As an example, if ten families receive one year of assistance through this activity, the offset to the Housing Choice Voucher Program would not be ten families. Because the average length of stay for current non-elderly and non-disabled families in the Housing Choice Voucher Program is nearly 10 ½ years, serving ten families through one year of short-term assistance is roughly equivalent to serving one family through our Housing Choice Voucher Program.

¹¹ "CalFire Incident Information – Blue Cut Fire," fire.ca.gov, August 23, 2016. http://www.fire.ca.gov/current_incidents/incidentdetails/Index/1391

Eligibility:

Families assisted through this activity will be subject to eligibility screening. At a minimum, each family must qualify as low-income (having gross annual income at or below the HUD-published Area Median Income adjusted for family size) and pass HACSB’s criminal history background screening.

Term of Assistance:

The term of assistance shall be determined by HACSB based upon the nature of the disaster at the time the local disaster is declared. In general, HACSB anticipates the term of assistance shall be six (6) to twelve (12) months. If appropriate, HACSB may provide a hardship extension. In any case, the total term of assistance shall not exceed twenty-four (24) months.

Subsidy Calculation and Reexamination:

The rental subsidy and tenant rent portions shall be determined using the formulas established through HACSB’s MTW Activity 22: Streamlined Lease Assistance Program. Please refer to the detailed description of the Streamlined Lease Assistance Program in this plan for additional information. No reexamination of income will be conducted during the term of assistance, regardless of the length of the term. The table below summarizes the subsidy calculation formula.

Household Type	Tenant Rent Portion	HACSB Subsidy
Elderly and/or Disabled Households	The greater of: <ul style="list-style-type: none">• 30% of gross income• HACSB’s minimum rent (currently \$125)• The baseline rent	Contract rent less tenant rent portion
Non-Elderly and Non-Disabled Households	The greater of: <ul style="list-style-type: none">• 30% of gross income• HACSB’s minimum rent (currently \$125)• The baseline rent	Contract rent less tenant rent portion

Leveraging of Resources:

In order to maximize the benefit to assisted families, whenever possible HACSB will engage community partners to provide additional funding, housing stabilization services, and related supportive services to the families assisted through this activity.

HAP Contract and Lease:

The terms of the lease and HAP Contract shall be the same as the term of the Local Disaster Short-Term Rental Assistance.

Portability:

Families assisted through this activity may not exercise portability to another jurisdiction unless the receiving PHA will absorb the family.

Subject to Availability:

Assistance provided through this activity shall be subject to the availability of funding as determined by HACSB.

2. Implementation Update

Please refer to the timeline for implementation below.

3. Timeline for Implementation

HACSB received approval of this activity via its 2017 Annual MTW Plan, Amendment 2, in April 2017. We are now working to incorporate policy revisions to facilitate implementation of the activity. We anticipate that this activity will be operational in 2018. However, HACSB will only house families through this activity in the event of a locally declared disaster.

4. Changes or Modifications

None.

B. Not Yet Implemented Activities

HACSB does not currently have any activities that are approved and not yet implemented.

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 6: Elimination of Assets

1. Approval, Implementation, and Close-Out Years

This activity was approved in our FY 2009 Annual MTW Plan and was implemented on October 1, 2009. The activity was closed out through HACSB's FY 2019 Annual MTW Plan.

2. Reason(s) for Close-Out

This activity was closed out due to the merge of activities 5 (Local Verification Policies), 6 (this activity), 9 (Elimination of Earned Income Disallowance), and 17 (Local Income Inclusions) through HACSB's FY 2019 Annual MTW Plan. This activity is now closed out as a separate activity. However, the modifications originally included through this activity are now incorporated into activity 5, which was re-titled "Simplified Income Determination" through HACSB's FY 2019 Annual MTW Plan.

Activity 9: Elimination of Earned Income Disallowance

1. Approval, Implementation, and Close-Out Years

This activity was initially included in HACSB's FY 2009 Initial Annual MTW Plan and became effective on October 1, 2009, for participants in the Housing Choice Voucher and Public Housing programs. The activity was closed out through HACSB's FY 2019 Annual MTW Plan.

2. Reason(s) for Close-Out

This activity was closed out due to the merge of activities 5 (Local Verification Policies), 6 (Elimination of Assets), 9 (this activity), and 17 (Local Income Inclusions) through HACSB's FY 2019 Annual MTW Plan. This activity is now closed out as a separate activity. However, the modifications originally included through this activity are now incorporated into activity 5, which was re-titled "Simplified Income Determination" through HACSB's FY 2019 Annual MTW Plan.

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 17: Local Income Inclusions

1. Approval, Implementation, and Close-Out Years

This activity was approved in our FY 2011 Annual MTW Plan and implemented on May 1, 2011. This activity was modified through HACSB's FY 2015 MTW Plan. The activity was closed out through HACSB's FY 2019 Annual MTW Plan.

2. Reason(s) for Close-Out

This activity was closed out due to the merge of activities 5 (Local Verification Policies), 6 (Elimination of Assets), 9 (Elimination of Earned Income Disallowance), and 17 (this activity) through HACSB's FY 2019 Annual MTW Plan. This activity is now closed out as a separate activity. However, the modifications originally included through this activity are now incorporated into activity 5, which was re-titled "Simplified Income Determination" through HACSB's FY 2019 Annual MTW 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. Sources and Uses of MTW Funds

i. Actual Sources of MTW Funds in the Plan Year

HACSB's unaudited and audited information regarding sources of MTW Funds is submitted through the Financial Assessment System – PHA (FASPHA).

ii. Actual Uses of MTW Funds in the Plan Year

HACSB's unaudited and audited information regarding uses of MTW Funds is submitted through the Financial Assessment System – PHA (FASPHA).

iii. Actual Use of MTW Single Fund Flexibility

HACSB's Local FSS Activity (MTW Activity #19) is funded using single-fund flexibility with savings achieved through other MTW activities.

HACSB's Career 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) program are also funded using single-fund flexibility.

B. Local Asset Management Plan

i. Did the MTW PHA allocate costs within statute in the Plan Year?

No.

ii. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?

Yes.

iii. Did the MTW PHA provide a LAMP in the appendix?

Yes. Please see Appendix A.

iv. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.

No substantial changes to the LAMP were made during the Plan Year. Minor updates were made to statistical information contained in the LAMP.

Section VI: Administrative

A. Reviews, Audits and Inspections

In FY 2015 and 2016 the U.S. Department of Housing and Urban Development's Office of Inspector General (the "OIG") audited certain aspects of the Shelter Plus Care program that is administered, in part, by HACSB. That audit 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.

B. Evaluation Results

Term-Limited 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, which began with the implementation of the Term-Limited Lease Assistance program and, follows participating families through their progress during their term of assistance by tracking their goals and accomplishments. In FY 2017, HACSB implemented an additional voluntary survey component that allows us to monitor the self-sufficiency related progress of families for up to two years after commencement of housing assistance. The results of this study have been and will continue to be used to adapt and develop the Term-Limited Lease Assistance activity. The study is ongoing and will continue in FY 2019.

No Child Left Unsheltered (Activity 23)

HACSB has also contracted with Loma Linda University to conduct a longitudinal study to determine 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. The study is ongoing and will continue in FY 2019.

C. MTW 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.

D. MTW Energy Performance Contract (EPC) Flexibility Data

Not applicable.

Appendix A: Local Asset Management Plan (LAMP)

The First Amendment to the Standard MTW agreement executed on May 21, 2009, allowed HACSB to design and implement a local asset management program. 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 260 agency computers in 27 locations throughout our county. They respond to an average of 120 help desk tickets per month that result in around 20 site visits per month.

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 of that assessment, LLU staff and students assisted with follow-up by providing on-site case work management and varying topic workshops. The partnership with LLU has further expanded to include evaluations and assessments of other HACSB MTW initiatives, including Term-Limited Lease Assistance and No Child Left Unsheltered.

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 245 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

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 \$84.08 per unit leased to the AMPS and \$12 per voucher 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 per voucher for the Housing Choice Voucher program.

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

Special Purpose Programs

In addition to the MTW Voucher Program, HACSB administers other voucher programs and special programs, such as Mainstream, Housing Opportunities for Persons with AIDS (HOPWA), Veteran's Affairs Supportive Housing (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. During FY 2018, we provided assistance to 90 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. During FY 2018, we provided assistance to 46 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. During FY 2018, we provided assistance to 433 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. During FY 2018, we provided assistance to 16 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 chronically homeless individuals and families 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 the Coordinated Entry System (CES) and DBH, matches the housing funds by providing supportive services. During FY 2018, we provided assistance to 38 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 the CES and DBH, matches the housing funds by providing supportive services. During FY 2018, we provided assistance to 179 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. During FY 2018, we provided assistance to 26 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. During FY 2018, we provided 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 the CES and DBH, matches housing funds by providing supportive services. During FY 2018, we provided assistance to 39 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 the CES and DBH, matches housing funds by providing supportive services. During FY 2018, we provided assistance to 18 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. During FY 2018, we provided assistance to 15 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 2018 seven students were awarded scholarships to assist them with their college expenses. The recipients are attending one of the following colleges/universities: California State University San Bernardino, California State Polytechnic University, Pomona, Alabama A & M University, California State University Fullerton, University of Redlands, and UEI College, Riverside. Their areas of study include majors such as: Business, Kinesiology, Animal Science, Liberal Studies, Business Management, and Certified Medical Assistant.

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. KEYS is committed to a community where individuals and families can lead meaningful and empowered lives and pass that legacy to future generations.

KEYS has fostered housing stability and support to individuals and families experiencing homelessness since 2013. Each grant year, KEYS has achieved the National Alliance to End Homelessness Benchmarks and Program Criteria for all three Rapid Rehousing funded programs: (1) Supportive Service for Veteran Families (SSVF), (2) California Department of Social Services (CDSS) Housing Support Program (HSP) contracted under HACSB and (3) HUD Continuum of Care (CoC) Rapid Rehousing programs.

Over the past fiscal year, KEYS has focused on improving access points for families, serving as a 'No Wrong Door' organization for those seeking homeless assistance. Each household is verified for homelessness and screened using a Vulnerability Index - Service Prioritization Decision Assistance Tool KEYS remains a stronghold within the San Bernardino County Coordinated Entry System (CES) in providing assistance to the homeless and those at risk of becoming homeless.

This system level approach improves the delivery of services to immediately resolve permanent housing options for HACSB customers. This allows both parties to streamline and leverage resources addressing the community's emerging or unmet needs. Some examples include: deposit assistance for VASH, providing intensive case management to all families enrolled in the No Child Left Unsheltered (NCLU) program. Together, both KEYS and HACSB continue to stabilize families towards a path of independence and self-sufficiency.

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 was completed in March 2017. 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. HPI also entered into a partnership with META Housing Corporation to construct and operate an 85-unit new construction affordable housing development for veterans, called Veterans Village. This development, also located near the Loma Linda VA hospital, will provide affordable housing and onsite supportive housing to Veterans and their families and is currently leasing units.

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 following list.

AFFILIATE NON-PROFIT			
PROPERTY NAME	CITY	UNITS	ENTITY
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

AFFILIATE NON-PROFIT			
PROPERTY NAME	CITY	UNITS	ENTITY
Horizons at Yucaipa	Yucaipa	50	HPI, Inc. Portfolio
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
TOTAL UNITS		704	

Appendix C: Fact Sheets

At HACSB, communication and education of team, participants, residents, landlords and community is critical to the success of our innovative programs. We have attached some of our sample Fact Sheets which are handy reference guides about our MTW programs and services. These fact sheets are posted online at www.hacsb.com and are also available at our offices.



Term-Limited Lease Assistance Program

Summary of Outcomes from Year 1–5

Established in 2012, the Term-Limited Lease Assistance Program couples five years of housing assistance with case management and supportive services to help participating families achieve economic self-sufficiency. In April 2017, the first set of families who leased under this new program began to transition off of the program after five years of assistance.

Innovative programs like this are vital to addressing the growing need for affordable housing in our communities and made possible given our special Congressional designation

under the Moving to Work (MTW) demonstration program. MTW provides only 1% of all Housing Authorities nationwide with the unique opportunity to design and test innovative, locally-designed programs and services to best meet their local communities and residents.

HACSB has partnered with Loma Linda University to conduct a longitudinal study of the families participating in the Term Limited Lease Assistance Program. The statistics below highlight the results of the program's fifth year results.

Outcomes from Year One to Five of the Program

INCOME AND EMPLOYMENT

- Average Household Income: **\$25,312***
- Average Household Earned Income: **\$18,776** (\$20,956 for families with full-time employment)
- Families with Earned Income: **75.1%**
- Changes from year 1 - 5:
 - **12.8%** Increase in income from wages*
 - **52.5%** Decrease in income from welfare
 - **19.3%** Increase in full-time employment
 - **18%** decrease in unemployment

* Excludes income from higher income households that exited the program early. Year four results had a 21.5% increase in income from wages, the drop in Year 5 is due to higher income households that exited the program early.

EDUCATION

- Decrease in Families without High School Diploma: **2.8%**
- Increase in Vocational Degrees: **17.1%**

EARLY EXITS

- Total exits between years 1-5: **55.5%**
- On Average **8.9%** of families exit by the second year, **27.9%** of families exit by year 3, **54.6%** exited by year 4.

In comparison to current families, early exiting families* have:

- Higher Total and Wage income
- Full time employment with health benefits

* Excludes families exited for program violations.

Fifth Year Activity

As families reach their final year of housing assistance, communications with the family and landlord take place more frequently, ensuring that the family is aware of the approaching conclusion of assistance and has the opportunity to communicate any new challenges to their HACSB caseworker. As the end date approaches, the family also has the opportunity to request a hardship exemption for a temporary extension of assistance.

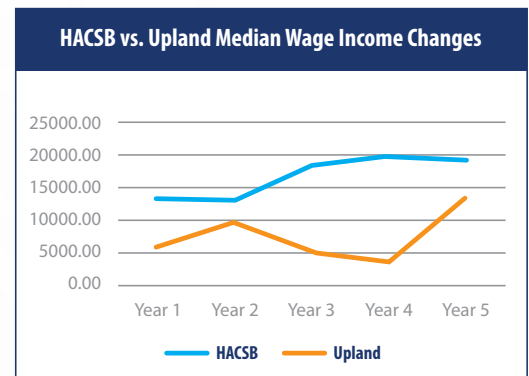
HACSB is also giving special attention to families that may be unprepared for leasing without assistance. Beginning at 18-months prior to the conclusion of assistance, these families receive additional intensive case management and support, including required monthly check-ins with their caseworker, a reassessment of the family's goal plan to address remaining challenges, and further support through HACSB partnerships such as with San Bernardino County Transitional Assistance Department and Workforce Development Department to help the family achieve stable employment.

OF THOSE FAMILIES IN THEIR FIFTH YEAR OF HOUSING ASSISTANCE:

- 24.6% receive TANF assistance
- 52.7% have a savings account
- 53.9% have full-time employment

Comparison to Upland Voucher Program

Given the positive improvements in income from the HACSB program, and paralleled local area economic improvement, it was necessary to determine whether the HACSB economic improvement were unique to the five year program, or a function of area economic improvement. Hence a comparison to the Upland voucher program. This program does not have a term limit or the additional supports seen in the HACSB five year program.



- 153 Upland families were compared to the 1,620 HACSB families within the same time frame (2012-2016)
- Year 5 median annual Wage Income for HACSB families was \$15,758 in comparison to Upland's \$6,414
- HACSB showed a 46.1% increase in wage income from year 1 to 5 in comparison to Upland's 128.5% increase.
- HACSB increased the number of families with Earned Income by 9.0% in comparison to Upland's increase of 6.0%.

Hardship Exceptions

HACSB recognizes that the expiration of assistance may present a hardship for some families and may need an extension to their term of assistance. Three types of hardship exemptions are available, which include:

- Unforeseen Involuntary Loss of Income: If a family experiences an unforeseen involuntary loss of income within nine (9) months prior to the expiration of your assistance.
- Completion of Self-Sufficiency Activity: The head of household must be participating in an approved educational, job training, or other self-sufficiency activity leading to gainful employment.
- Other Reason: Under this category, HACSB's hardship exemption committee may grant an extension for an administrative error by the Housing Authority or other reason as determined by HACSB.

Future Monitoring

HACSB has implemented a voluntary survey system that will allow us to continue monitoring the family for up to two years after the conclusion of assistance. The annual survey will collect information about the family's education/training and employment status, household income, housing status, and other factors. Participating families receive a monetary incentive for completing each survey. The information will allow HACSB to assess the impacts of the program on families post-assistance, and to make modifications to the program as needed.



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Housing Authority of the County of San Bernardino

WHO WE ARE FACT SHEET

The Housing Authority of the County of San Bernardino (HACSB) is one of the most progressive housing authorities in the County and also the largest provider of affordable housing in San Bernardino County. HACSB proudly owns and/or manages programs with 13,225 housing units and vouchers combined to serve approximately 30,000 people, most of whom are seniors, individuals with disabilities, veterans, and children.

Unlike other health and human services programs, we provide housing assistance based on the number of vouchers and public housing units for which we are authorized and funded through the U.S. Department of Housing and Urban Development (HUD) – unfortunately we do not have the resources to provide immediate housing assistance. As families move off our various affordable housing programs, new families are pulled and housed off the waiting list. As a result, it takes years for low-income families to receive housing assistance.

A common misconception about affordable housing programs is that low-income households do not work and/or work minimal hours and rely on government assistance. However, the reality is most do work, but their earnings, despite educational and/or professional training levels, do not pay enough. The table below outlines income and occupational levels at various income levels:

INCOME	OCCUPATION PER HOUR/ANNUAL INCOME		
EXTREMELY LOW	Fast-Food Cook (\$9.54/\$21,017)	Hairdresser (\$11.21)	Home Care Aides (\$11.60/\$29,440)
VERY LOW	Preschool Teacher (\$14.05/\$32,028)	Paramedics (\$15.39/\$36,157)	Mail Clerks (\$14.10/\$29,800)
LOW	LVN (\$22.66/\$47,377)	Truck Driver (\$22.75/\$49,093)	Construction Laborers (\$17.10/\$40,564)
MODERATE	Fire Fighter (\$25.84/\$58,625)	Teachers (NA/\$67,728)	Fashion Designers (\$21.11/\$49,254)
MIDDLE	RN (\$45.90/\$96,164)	Police (\$44.17/\$89,788)	Airline Pilots (\$27.84/\$76,721)
HIGH	Physician (\$58.61/\$157,368)	Attorney (\$63.67/\$133,548)	High-Level Management (\$86.15/\$188,992)

HUD defines affordability as paying no more than 30% of monthly household income towards rent. In San Bernardino County, the median asking rent is \$1,566. For the professions outlined above, that amount can mean a rent burden as high as 81%. (Citation: California Housing Partnership, SBC Renters in Crisis, May 2017)

HOUSING TYPES

HACSB is committed to providing both traditional affordable housing assistance as well as mixed-income housing developments that complements existing communities.

The following are three main programs HACSB manages and/or administers:

Tenant-Based Voucher Rental Assistance Program Units: 10,653

These units are privately owned, with rent subsidies paid directly to owners by the Housing Authority. These programs are managed by HACSB offices in Ontario, San Bernardino, Upland, and Victorville. (This program is commonly known as Section 8.)

Public Housing Units: 562

These units are owned and managed by the Housing Authority through its offices in Barstow, Colton, San Bernardino, and Upland.

Housing Authority-Owned Units: 2,478

These units are owned by the Housing Authority and were either acquired or developed through a variety of partnerships with the state of California, San Bernardino County Department of Community Development and Housing, various cities throughout the county, and Housing Partners I Inc., a nonprofit public housing corporation.

MOVING TO WORK

As a high-performing and innovative agency, in 2008, HACSB received the Moving to Work (MTW) designation by Congress and the U.S. Department of Housing and Urban Development (HUD). The designation provides HACSB with the flexibility to waive some HUD program requirements and develop local policies that are best suited for the various communities in San Bernardino County. Currently there are 39 designated MTW agencies out of 3,200 housing authorities nationwide.

As a result, HACSB has transformed its agency by executing innovative initiatives based on the three key MTW objectives: saving taxpayer dollars through efficient work; helping families achieve economic independence; and ensuring a family's freedom of housing choice. The table below highlights the initiatives HACSB has implemented; efforts that traditional Housing Authorities may not be able to accomplish.

ADMINISTRATIVE EFFICIENCIES

- Single Fund Budget
- Strategic Investment Policies
- Alternate Assessment Program
- Biennial Recertifications
- Local Verification Policies
- Elimination of Assets
- Controlled Program Moves
- Local Asset Management
- Operating Subsidy for Vista del Sol
- Property Management Innovation
- Utility Allowance Reform
- Streamlined Lease Assistance Program
- Local Inspection Standards

ECONOMIC INDEPENDENCE

- Local Policies for Portability
- Elimination of Earned Income Disallowance
- Minimum Rent
- Local FSS program
- Term Limited Lease Assistance Program
- No Child Left Unsheltered
- Transition for Over-Income Families
- Pilot "Work" Requirement

EXPANDING HOUSING CHOICE

- Local Project-Based Voucher
- Local Payment Standards
- Project-Based Voucher
- Flexibility for Horizons at Yucaipa Senior Housing

MOVING TO WORK (CONTINUED)

These initiatives have resulted in positive outcomes related to the three MTW objectives for HACSB and the families we serve. In FY 2017, the following outcomes were achieved as a result of changes made with MTW flexibilities:

- Total cost savings from MTW activities: **\$631,647**
- Staff time savings from MTW activities: **26,472 hours**
- Average earned income for families participating in Streamlined Lease Assistance Program increased by **12%**, and the number of families receiving TANF decreased by **3.3%** in the 3 years since implementation.
- The number of families leasing in areas of poverty and/or minority concentration has decreased by **8%** as a result of the Local Payment Standards activity.
- Average earned income increased **60.2%** since implementation for families participating in the Term Limited Lease Assistance Program.
- For families in the Term Limited Lease Assistance program, full-time employment increased **19.3%** since implementation.

MORE THAN JUST HOUSING

Through partnerships with other entities, HACSB provides the following resources and support:

HACSB's Career Development Initiatives Team helps families with career mentoring; resume building; overcoming barriers to employment; financial literacy/capability skills, such as budgeting and credit/asset building; and other employment development services.

The partnership with the **San Bernardino County Workforce Development Department (WDD)** provides on-site Workforce Development Specialists (WDS) who work exclusively with HACSB customers. Since 2013, the WDD and HACSB staff have performed approximately 550 job placements with wages ranging from \$9 to \$23 per hour. HACSB and WDD also established the Youth Employment Program from 16- to 24-year-olds to take advantage of up to six months of subsidized employment experience.

Mutual customers have access to the county's **Transitional Assistance Department (TAD)** Programs and Supportive Services and are specifically targeted for the CalWORKS Youth Employment Program and the CalWORKS Subsidized Employment Program for adults. HACSB provides housing support and coaching while TAD offers job training, placement opportunities, and supportive services.

Over the past 26-years through **HACSB's Annual Scholarship Program**, HACSB has awarded 292 students attending colleges, universities, and technical/vocational schools with \$219,250 in scholarships.

HACSB's Homeownership Assistance Program, which since its inception in 2000, has helped 232 families achieve homeownership. Since 2009, this program has ranked among the top in the nation in creating new homeowners each year.

Staff also makes **direct referrals to over 50 partner agencies** to provide program participants with vocational training, ESL classes, financial literacy education, parenting classes, mental health services, support groups, and small business development classes.

HOUSING AUTHORITY of the County of San Bernardino BY THE NUMBERS



2,478
Housing Authority-owned units



10,653
vouchers for **25,348**
individuals



13
public housing developments
in **10 cities**



128
employees across
17 offices



50+
community and government
partners



61,448
applicants on various
waiting lists



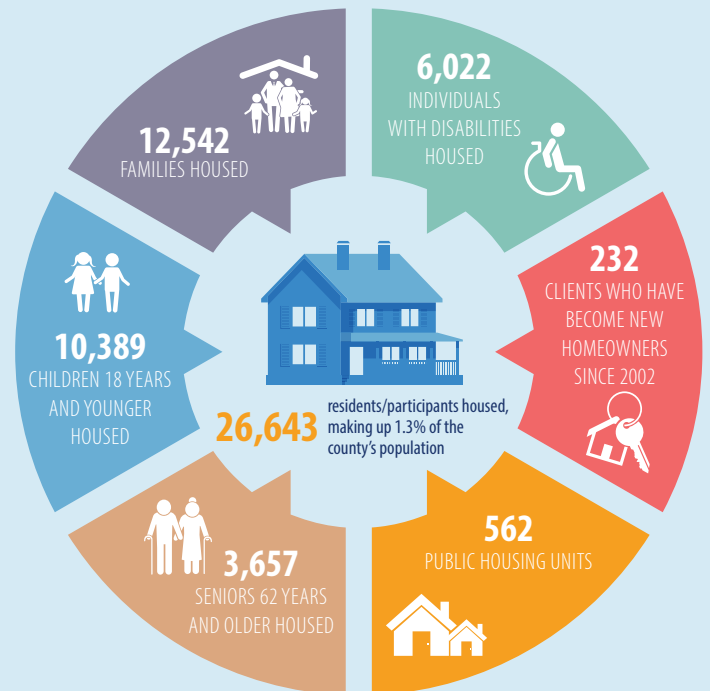
292
scholarship recipients
since **1991**

\$131 million
added to the county's economy
during fiscal year 2016-17

\$86 million
paid to nearly 4,600 landlords
for housing assistance

\$9.9 million
paid to 678 vendors for various
programs and services

\$3.4 million
spent on rehabilitation, construction
and acquisition of housing units



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Appendix D: Summary of MTW Activities

ACTIVITY	DESCRIPTION	STATUTORY OBJECTIVE	PLAN YEAR(S)	STATUS
Activity 1	Single Fund Budget	Administrative Efficiency	FY 2009	Implemented
Activity 2	Strategic Investment Policies	Administrative Efficiency	FY 2009	Closed Out
Activity 3	Alternate Assessment Program	Administrative Efficiency	FY 2009	On Hold
Activity 4	Biennial Recertifications	Administrative Efficiency	FY 2009, FY 2012	Implemented
Activity 5	Simplified Income Determination	Administrative Efficiency	FY 2009	Implemented
Activity 6	Elimination of Assets	Administrative Efficiency	FY 2009	Closed Out
Activity 7	Controlled Program Moves	Administrative Efficiency	FY 2009	Closed Out
Activity 8	Local Policies for Portability	Economic Independence	FY 2009, FY 2010	Implemented
Activity 9	Elimination of Earned Income Disallowance	Economic Independence	FY 2009	Closed Out
Activity 10	Minimum Rent	Economic Independence	FY 2009	Implemented
Activity 11	Local Project-Based Voucher Program	Expanding Housing Opportunities	FY 2009, FY 2011	Implemented
Activity 12	Local Payment Standards	Expanding Housing Opportunities	FY 2009, FY 2012	Implemented
Activity 13	Local Inspection Standards	Administrative Efficiency	FY 2010	Implemented
Activity 14	Local Asset Management Program	Administrative Efficiency	FY 2010	Implemented
Activity 15	Pilot Work Requirement	Economic Independence	FY 2010	Closed Out
Activity 16	Operating Subsidy for Vista del Sol	Expanding Housing Opportunities	FY 2010	Closed Out
Activity 17	Local Income Inclusion	Economic Independence	FY 2011	Closed Out
Activity 18	Property Management Innovation	Administrative Efficiency	FY 2011	Implemented
Activity 19	Local FSS program	Economic Independence	FY 2011	Implemented
Activity 20	Term-Limited Lease Assistance Program	Economic Independence	FY 2011, FY 2015	Implemented
Activity 21	Utility Allowance Reform	Administrative Efficiency	FY 2012	Closed Out - Never Implemented
Activity 22	Streamlined Lease Assistance Program	Administrative Efficiency	FY 2013	Implemented
Activity 23	No Child Left Unsheltered	Economic Independence	FY 2014	Implemented
Activity 24	Transition for Over-Income Families	Economic Independence	FY 2014	Implemented
Activity 25	Project-Based Voucher Flexibility for Horizons at Yucaipa Senior Housing	Expanding Housing Opportunities	FY 2016	Implemented
Activity 26	Local Disaster Short-Term Rental Assistance	Expanding Housing Opportunities	FY 2017 Amendment 1	Implemented