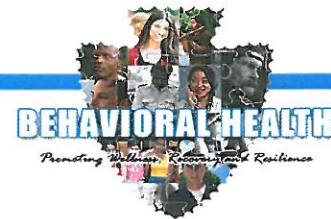




**County of San Bernardino
Department of Behavioral Health
Mental Health Services Act**

**30-Day Posting
Public Review Period for
Lugo Senior Apartments
Under the MHSA Housing Program**

November 1, 2011



ALLAN RAWLAND, MSW, ACSW
Director

CaSONYA THOMAS, MPA, CHC
Assistant Director

November 1, 2011

Notice of Initiation of 30-Day Public Review Period for Project Lugo Senior Apartments Under the MHSA Housing Program

A 30-day public review and comment period is required for the County of San Bernardino Department of Behavioral Health to submit an application to the State-administered Mental Health Services Act (MHSA) Housing Program to secure funding for any proposed housing development intending to provide permanent supportive housing for mental health clients. This public review pertains to the Project Lugo Senior Apartments development, which intends to provide permanent supportive housing for some of the County's mental health clients.

Comment on the proposed development, as attached, must be received by the County prior to the end of the 30th day from the date posted on this notice to be considered for inclusion in the County's final analysis and certification of the application to the State.

The following sections of the application are attached for consideration, review and comment:

- Item D.1 Development Summary (Attachment B)
- Item D.2 Development Description
- Item D.3 Consistency with the Three-Year Program and Expenditure Plan
- Item D.4 Description of Target Population to be Served
- Item D.5 Tenant Eligibility Certification
- Item D.6 Tenant Selection Plan
- Item D.7 Supportive Services Plan
- Item D.8 Supportive Services Chart
- Item D.9 Design Considerations for Meeting the Needs of the MHSA Tenants

We appreciate your feedback and encourage you to direct any questions or comments regarding the proposed development to Douglas M. Fazekas as follows:

Douglas M. Fazekas, Administrative Manager
Housing and Employment Program
Department of Behavioral Health, County of San Bernardino
Phone: 909/387-8619; Fax: 909/386-8578
dfazekas@dbh.sbcounty.gov

Sincerely,


Allan Rawland, MSW, ACSW
Director

cc: Greg Devereaux, County Executive Officer
Linda Hagan, Assistant Executive Officer, Human Services
Susan Benner, Executive Director, Housing Authority of the County of San Bernardino
Dena Fuentes, Director, Redevelopment Agency & Community Development & Housing
Patricia M. Cole, Deputy Executive Officer, Economic Development Agency
John Hallen, Administrative Analyst
Members, Behavioral Health Commission
Tom Hernandez, Homeless Services Manager, Office of Homeless Services
Executive Management Team, Department of Behavioral Health
Douglas M. Fazekas, Department of Behavioral Health

AR:CT:DF:cv

GREGORY C. DEVEREAUX
Chief Executive Officer

Board of Supervisors
BRAD MITZELFELT, VICE-CHAIRMAN...First District NEIL DERRY..... Third District
JANICE RUTHERFORD.....Second District GARY C. OVITT..... Fourth District
JOSIE GONZALES, CHAIR.....Fifth District

RENTAL HOUSING DEVELOPMENT SUMMARY FORM

County Mental Health Department: San Bernardino Department of Behavioral Health

Name of Development: Lugo Senior Apartments

Site Address: 839-867 N. Lugo Avenue & 185-187 E. 9th Street

City: San Bernardino State: CA Zip: 92410

Development Sponsor: Meta Housing and Western Community Housing, Inc.

Development Developer: Lugo Senior Apartments, a California Limited Partnership

Primary Service Provider: Age Wise Supportive Services

New Construction Acquisition/Rehabilitation of an existing structure

Type of Building: Apartment Building Single Family Home
 Condominium Other

Total Development		MHSA Funds	
Total Number of Units:	119	Total Number of MHSA Units:	10
Total Cost of Development:	\$ 20,367,561	Amount of MHSA Funds Requested:	\$ 2,249,720
		Capital:	\$ 1,124,860
		Capitalized Operating Subsidies:	\$ 1,124,860

Other Rental Subsidy Sources (if applicable): Will apply for 10 Shelter Plus Care Vouchers

Target Population (please check all that apply):

Adults Transition-Age Youth Older Adults

County Contact

Name and Title: Douglas M. Fazekas, Administrative Manager, DBH

Agency or Department Address: 820 E. Gilbert Street, San Bernardino, CA 92415

Agency or Department Phone: 909-387-8619

Agency or Department Email: dfazekas@dbh.sbcounty.gov

**Section D: Supportive Services Plan
Instructions**

1. Submit the MHSA Supportive Services Information, Section D, Items D.1 through D.16, as listed on the Application Index & Checklist.
2. Enter required information into the yellow box marked "Response".
3. Items D1 through D9 must be circulated for local review for 30 days.

Item D.1 Development Summary Form (Attachment B)

Instructions: Complete and submit the Development Summary Form (**Attachment B**)

Item D.2 Development Description

The Development Description should provide a narrative (approximately two pages) that includes:

1. Name and location of the proposed housing development;
2. Service goals of the development;
3. Characteristics of tenants to be served;
4. Type of housing to be provided (new construction or acquisition/rehab.);
5. How the building(s) in which housing and services will be provided will meet the housing and service needs of the MHSA tenants (location, building type, layout, features, etc.);
6. Name of primary service provider, property manager, and other development partners; and,
7. Summary of the anticipated sources of development financing. (Name sources only, do not include dollar amounts.)

Response:

Name and location of the proposed housing development

Lugo Senior Apartments (Tentative: Final name has not been chosen)
 839 - 867 N. Lugo Ave and 185 -187 E. 9th Street
 San Bernardino, CA 92410

Lugo Senior Apartments is a major acquisition rehabilitation project consisting of 11 buildings on a 3.32 acre lot in San Bernardino, CA and convert it into 119 two and one-bedroom rental apartments for very low- and low-income seniors. 10 of the units will be two-bedroom units of approximately 777 square feet, and the remaining 109 will be one-bedroom units of approximately 542 square feet. The building will be renovated using sustainable and “green building” principles to exceed existing energy efficiency by at least 30%, and will be designed to provide a safe environment with amenities appropriate for the new senior population.

Lugo Senior Apartments possesses a scale and massing that is consistent with the 2 story multi-family housing facilities that are common in San Bernardino. The renovations will include the installation of all new energy-efficient windows, metal entrance doors to each unit including weather stripping, reroofing of all buildings, painting of all interior and exterior surfaces, repair and resurfacing of asphaltic paving in the parking and driveway areas, security gates at each building, installation of new cabinets and appliances, window treatments, countertops, water heaters, repair and replace of HVAC units where necessary, cable wiring, new wrought iron perimeter fencing, gated access to the property, site lighting, building lighting, and security features. Site lighting, building lighting, and security video cameras will be installed at various locations throughout the property. An existing 2-bedroom single family residence located on the site will be demolished and replaced with a new Recreation Room/Clubhouse building, which will include a community room, computer/business room, library, and two offices (one Managers office and one shared office available for the MHSA case manager). One of the renovated two bedroom units will be provided to the full-time on-site property manager. The existing pool will be removed, replaced by a new pool area in the NE corner of the property. The pool area will include new

handicap accessible bathrooms and showers. All walkways around the residence will be removed and replaced which will dramatically improve site access. There will also be an elevator added as well as multiple bridges to connect most of the buildings on the second floor. The elevator will provide the tenants greater accessibility and mobility throughout the project. The entrance will be locked at all times, with access restricted to tenants with keys. The manager's unit will face the entrance, allowing the manager to conveniently observe the building's entrance/exit. The new community center, pool area, and cabana within the development will be accessible to physically disabled persons including access controls, door widths, turning radius within rooms, lighting controls, emergency signals, ramps and floor slopes. All ground floor unit entrances will be minimally accessible for physically disabled using wheelchairs and mobility devices of sizes anticipated within California Building Code standards. The project will provide a new elevator and walking decks, which will provide access for the physically disabled using wheelchairs and mobility devices of sizes anticipated within the California Building Code standards, to the existing second floor units.

Tenant Characteristics and Housing Service Goals

Lugo Senior Apartments will include a total of (119) units, (108) units to be rented to qualified seniors from the general population at affordable rent levels in compliance with the low income housing tax credit program. Additionally, the MHTA Housing Program at Lugo Senior Apartments will provide (10) units of permanent supportive housing (interspersed throughout the complex and will be given preference for first floor/ground level units when available) for eligible older adults with serious mental illness, as defined by MHTA program definitions. The MHTA units will target a population of older adults who may be high-utilizers of emergency and inpatient mental healthcare, have a co-occurring substance abuse disorder, be homeless or at-risk of becoming homeless, feel isolation, and have reduced personal and/or community functioning due to cognitive or physical decline. Older adults in the program will be "extremely low income" with an annual income not to exceed 30% of the Area Median Income (AMI). The property owner will employ a resident services manager, an onsite property manager, and maintenance staff. The property manager and resident services manager will meet regularly with the MHTA Full Service Partner, Age Wise Supportive Services (AWSS), to discuss relevant tenant/client issues, overall performance of the supportive housing program, coordination of voluntary on-site supportive services and activities, and other relevant matters. The goal for the Lugo Senior Apartments and the MHTA Housing Program is to provide safe and affordable housing that is linked to comprehensive services that supports each tenant's self-sufficiency and overall quality of life.

Primary Service Providers

Lugo Senior Apartments, L.P. in conjunction with the San Bernardino Department of Behavioral Health will be partnering with Age Wise Supportive Services program. AWSS will assist older adult resident consumers to maintain self-sufficiency, succeed in their wellness, reduce hospitalizations, reduce incarcerations, increase employment, if applicable or desired, and successfully reintegrate into the community. In addition to services provided by AWSS, Lugo Senior Apartments, L.P will partner with EngAGE, who will provide

comprehensive, voluntary supportive services to all tenants of the development. EngAGE has 11 years of experience in delivering life-enhancing programs to thousands of low-income seniors in Southern California. EngAGE has a network of providers of all aspects of senior services in the area. In addition to providing access to a complete array of existing community support services such as transportation coordination, mental health services, healthcare, adult day health, personal care services, health education, meals on wheels and others, on-site classes to engage seniors in healthy living will be provided. EngAGE's programs change on a semester basis like college and are taught by professional, college-level instructors trained by industry leaders with dozens of years of experience in aging. The goals are healthy communities, successful aging and heightened awareness to create high-involvement, impassioned residents who age in a healthy and creative manner.

Other Development Partners

Lugo Senior Apartments is a partnership of an affiliate of Meta Housing Corporation (Lugo Senior Apartments, LLC) and an affiliate of Western Community Housing, Inc. (WCH Affordable II, LLC). Meta Housing Corporation has extensive experience in the development of affordable rental housing throughout California. Since 1976 Meta's team has delivered more than 12,000 units while remaining dedicated to designing and developing exceptional communities for families and seniors across Southern California. Western Community Housing, Inc. (WCH) is a California Non-Profit Public Benefit Corporation. WCH was founded in 1999 with a mission to provide affordable housing and social service programs to low and moderate income families and seniors residing in affordable rental housing communities. WCH currently has an ownership interest in over 55 affordable housing communities comprising over 5,400 units. Western Community Housing's properties include a 60-unit supportive housing project for the developmentally disabled in Tucson, Arizona.

Development Financing

Financing for Lugo Senior Apartments includes (approximately):

Conventional Perm Loan
City of San Bernardino Redevelopment Agency
Affordable Housing Program Grant
MHSAs Capital Funding
Low Income Tax Credit Equity
Developer Fee

Item D.3 Consistency with the Three-Year Program and Expenditure Plan

Describe how the proposed housing development is consistent with the sponsoring county mental health department's approved Three-Year Program and Expenditure Plan. Provide specific information regarding how the development meets the priorities and goals identified in the Three-Year Program and Expenditure Plan.

Response:

The County of San Bernardino Department of Behavioral Health (DBH), through the Fiscal Year 2010-11 Annual Update to the Three Year Program and Expenditure Plan for MHSA Community Services and Support (CSS), identified a need for permanent supportive housing for Older Adults with Serious Mental Illness (SMI) who are homeless or at risk of being homeless and are underserved. Additionally, the County's original MHSA Three Year Program and Expenditure Plan (for Fiscal Years 2005-06, 2006-07 and 2007-08), prepared following an intensive collaborative effort and input from consumers, family members, community leaders, service providers and other interested parties which included community forums and age-specific workgroups and surveys, found that the provision of supportive permanent housing for Older Adults, who are homeless or in danger of homelessness, was ranked among the top five issues identified by community workgroups for Older Adults. The County of San Bernardino MHSA Housing program is expected to generate approximately 150 Supportive Housing units across all the age categories served. The MHSA Housing program proposal for the Lugo Senior Apartments responds to this identified community need and County priority by directly serving the Older Adult population with SMI who are homeless or at risk of homelessness.

Lugo Senior Apartments Responds to Identified Need for Older Adult Housing

Meta Housing and Western Community Housing, Inc. partnering with Age Wise Supportive Services (AWSS) as the full service provider (FSP) for MHSA specific resident services, is requesting MHSA capital and operating subsidy funding for the Lugo Senior Apartments. The Lugo Senior Apartments will provide ten (10) one-bedroom units of permanent supportive housing for ten (10) MHSA-eligible Older Adult clients within the larger One Hundred Nineteen (119) unit development. The Lugo Senior Apartments will collaborate with the local FSP, Age Wise Supportive Services, to provide voluntary supportive services to these ten (10) MHSA-funded units. AWSS will support the clients in these ten (10) units by providing the clients with the tools necessary for maintaining their housing, sustaining independence, and transitioning into active members of their communities.

Consistent with the goals outlined in the CSS plan, supportive services at the Lugo Senior Apartments are detailed in sections D.7 and D.8 of this notice.

Item D.4 Description of Target Population to be Served

Describe the MHSA Rental Housing Program target population to be served in the development. Include a description of the following:

1. Age group, i.e., adults, older adults, children, transition-aged youth;
2. The anticipated income level of the MHSA tenants; and,
3. A description of the anticipated special needs of the target population to be served, e.g., physical disabilities, chronic illness, substance abuse, prior housing status, etc.

Response:

The Lugo Senior Apartments will provide 10 units of permanent supportive housing for Older Adults, one of the identified Mental Health Services Act (MHSA) target populations under the County of San Bernardino MHSA Housing plan. Older Adults served in the MHSA Housing program at the Lugo Senior Apartments will be age 60 or older (though certain funding sources within the Lugo Senior Apartments project may limit eligibility to 62+) with a diagnosis of serious mental illness (SMI). As Outlined in the County 10-year CSS plan, eligible individuals may be unserved or underserved and may have been hospitalized, at risk of institutionalization or been involved in the criminal justice systems. Individuals served may have a co-occurring substance abuse disorder, be homeless or at risk of becoming homeless, and may suffer from functional impairments. Older Adults in the program will be of very low income with an annual income not to exceed 30% of Area Median Income (AMI), and many older adults may have incomes considerably less than 30% AMI. At the time of entrance into the housing, it is anticipated that many of the older adults may have no income other than SSI.

Item D.5 Tenant Eligibility Certification

The county mental health department is responsible for certifying the eligibility of individuals, applying for tenancy in an MHPA unit, for compliance with the target population criteria. Submit a narrative description of the following:

1. How an individual applies to the county to become certified as eligible for an MHPA unit;
2. How certification of eligibility will be documented, provided to the individual applicant, and maintained by the county; and,
3. How certification of eligibility will be provided to the property manager/development.

Response:

The County of San Bernardino Department of Behavioral Health Housing and Employment Program invited a range of stakeholders to participate in discussions of San Bernardino's Mental Health Services Act Housing Program Tenant Referral and Certification Process. Meetings were held in various parts of the County between March and August 2009 and included members of the Housing Policy Advisory Committee, the Technical and the Executive MHPA Housing Committees; all Full Service Partnerships; and Peer Family Advocates. Feedback from these meetings has been incorporated into the final version of the Tenant Referral and Certification Process

Application Process:

San Bernardino County Department of Behavioral Health (SBDBH) MHPA Housing Program commits to a standardized tenant referral and certification application process for all potential tenants in the program. The process will involve two steps:

- 1) Potentially eligible consumers will have the option of entering the Full Service Partnership (FSP) or being certified as eligible for MHPA housing by the FSP. Potentially eligible consumers may be directed to the FSP through a variety of sources such as SBDBH outreach, case management teams, county outpatient programs and contract agency outpatient programs, transitional residential programs, hospitals, acute psychiatric facilities, jails, referrals from housing managers and self-referrals.
- 2) Any FSP enrolled or FSP eligible consumer may apply for MHPA Housing once they have been certified as MHPA eligible. Property management screening for housing will be conducted by the housing provider, and will be separate from eligibility determination for MHPA services.

The criteria for eligibility under the MHPA housing program are (1) being homeless or at risk of homelessness and (2) meeting San Bernardino County's older adult criteria for serious mental illness. Applicants will be screened by the SBDBH MHPA programs for homelessness and at-risk of homelessness as well as mental health disability. Those clients who are FSP enrolled/eligible will be certified by the FSP, and verification of homelessness, at-risk of homelessness, and mental health disability will be documented following processes and procedures outlined in Department of Behavioral Health Standard Practice Manual.

SBDBH and its contractors will use culturally competent efforts to outreach to and engage members of the target population, including those among unserved or underserved ethnic communities and other minority populations, and will utilize a variety of proven outreach strategies to recruit consumers for FSP enrollment. In addition to soliciting applications from individuals reached through direct outreach methods, the SBDBH MHSA Housing Program staff will accept referrals from an extensive county-wide network of government and nonprofit organizations and service agencies. Examples of potential sources of referral include Behavioral Health Access and Crisis Hotlines and clinical programs, including the Adult – Psychiatric Triage Diversion Team at County Hospital, shelters for single adults and families (both emergency and short-term), outreach and case management teams, transitional residential programs, hospitals, acute psychiatric facilities, jails, and self-referrals. Any mentally ill potential applicants who contact housing developments directly will be informed by the property management or program staff at the development to contact the SBDBH Housing and Employment program to be assigned to an FSP and receive MHSA Program certification of eligibility.

Notification:

All applicants shall be notified in writing by the FSP of a decision regarding their eligibility within a reasonable time from the date the complete Application for Certification was received by the FSP. If the certification is denied because the consumer did not meet the MHSA criteria as evaluated by the Full Service Partnership, the referring party and the prospective tenant will be notified in writing and informed of the reason for the denial. The referring party and/or consumer may resubmit their request for FSP enrollment/eligibility for reconsideration if the conditions that resulted in the original denial change.

Applicants meeting all eligibility requirements will be certified by the FSP and the applicant, the referring agency (if applicable) and the Property Manager will be notified in writing that the Certification of Eligibility for Participation in the MHSA Housing Program has been granted. However, certification of MHSA eligibility will not automatically grant inclusion on the site specific waiting list, which will be separate and maintained by the Property Manager. It should be noted that to be included on the site specific waiting list, applicant may be required to submit additional documentation to the Property Manager after they have received the MHSA Housing Eligibility certification.

Item D.6 Tenant Selection Plan

Provide a tenant selection plan, specific to the proposed development, that describes the following:

1. How prospective tenants will be referred to and selected for MHSA units in the development;
2. The tenant application process;
3. The procedure for maintaining the wait list;
4. The process for screening and evaluating the eligibility of the prospective MHSA tenants, including the criteria that will be used to determine a prospective MHSA tenant's eligibility for occupancy in the development;
5. The appeals process for individuals who are denied tenancy in an MHSA unit; and,
6. The reasonable accommodations policies and protocols.

NOTE: The Department's approval of the MHSA Housing Program Application does not ensure that the Tenant Certification/Referral Process is compliant with local, state and federal fair housing laws. The Developer/Borrower is advised to seek legal counsel to ensure that the Tenant Certification/Referral Process complies with fair housing laws.

Response:

Lugo Senior Apartments will designate (10) ten units out of a total of (119) one hundred nineteen units as permanent supportive housing for MHSA-eligible clients referred by the County of San Bernardino Department of Behavioral Health Housing Program. The rent for the designated units will be limited to 30% of SSI up to a maximum of 30% of AMI. The designated units are one bedroom, one bath units including full kitchens and will be dispersed throughout the community.

All tenants will have access to the on-site community room and other amenities of the property. A separate office space will be provided where MHSA tenants can meet privately with case managers to receive necessary mental health and case management services.

Western Seniors Housing (WSH) will provide property management services on behalf of Lugo Senior Apartments, LP. Western Seniors Housing Inc. was incorporated in California on April 28, 2000 and is licensed as a real estate management company through the California Department of Real Estate. WSH specializes in management of senior apartment communities and currently manages 25 properties throughout Southern California with 2,665 units that rent to market rate, affordable and special needs seniors including MHSA tenants.

MHSA Housing Program Unit Availability Notification

Prospective tenants will be notified of available MHSA Housing Program units through the following process:

1. WSH, the property management company will coordinate with the San Bernardino Department of Behavioral Health (DBH) Housing Program to fill vacancies in MHSA units with applicants that meet the MHSA criteria and are enrolled in or are eligible for the program. Any prospective tenants not referred by DBH will be directed to the DBH for certification of eligibility for MHSA housing. DBH will provide confirmation of

MHPA housing unit eligibility to the applicant and to WSH if the applicant meets the MHPA Housing Program criteria.

2. Prospective tenants must complete the rental application process at Lugo Senior Apartments after being referred by DBH. (see below)
3. Lugo Senior Apartments will keep a site specific wait list. The wait list will be updated on a regular basis by contacting the prospective tenant and DBH/ Age Wise Supportive Services (AWSS) to inquire on their continued interest in applying for the MHPA unit.

Rental Application Process and Wait List Procedures

DBH will refer enrolled or eligible clients to Lugo Senior Apartments to apply for MHPA housing. All prospective tenants will be required to complete and submit a rental application. Applications will be processed in the order their certification of MHPA eligibility is received and will be date and time stamped upon receipt. If the number of applicants exceeds the number of available units they will be placed on the wait list in accordance with the time date stamp on the application. Upon request, WSH will provide the wait list status for prospective tenants to DBH.

Eligibility Criteria

In order to be eligible for tenancy in one of the (10) ten MHPA units at Lugo Senior Apartments the following criteria must be met in addition to the Applicant Interview requirements: All occupants of the unit must be age 62 or older and must be eligible or enrolled in the MHPA program and referred by DBH and verification of MHPA Housing Program Eligibility will be provided by DBH.

Applicant Interview and Screening Requirements

For any available MHPA Housing Program units, WSH will contact the next eligible applicant on the wait list to schedule an interview appointment. If requested by the applicant, interviews will be scheduled to allow for a case manager from DBH to be present in order to assist the applicant. For the interview, the applicant must be prepared to provide a \$20.00 Non-refundable Application fee (per person), two forms of government issued identification with at least one being a photographic identification, and proof of income and/or assets (SSI award letter, pay stubs, bank statements, etc.) If all required documentation is in order, the interview and screening process will continue as follows:

- a) In addition to the Rental Application, the Applicant will be asked to complete and sign forms that will be sent out to verify the information on their application including income, assets, landlord/personal references, etc. Forms include but are not limited to the Tenant Income Certification Questionnaire, income/asset verification authorization forms and any other forms required by CTCAC for the LIHTC program. All sources of income must be verifiable. Any applications more than 3 months old must be updated.
- b) Criminal/Credit background screening will be conducted for all applicants. Applicant's Consumer Report must be favorable. WSH realizes that the requirement for a favorable consumer report may restrict access to many of the MHPA applicants, and will provide a liberal reasonable accommodation procedure to address credit and criminal background issues and assure that MHPA applicant are being screened into

the property as appropriate. WSH will also carefully consider applicants who have deficiencies that are being directly addressed by the applicants association with a Full Service Partnership provider. In addition, with the approval of the applicant, the referring case manager will be given an opportunity to appeal any application denial based on information obtained from criminal record checks. However, based on fair housing requirements, all applicants will be required to demonstrate they meet program requirements, subject to reasonable accommodations. Favorable credit is defined as:

- No negative utility accounts within the past 6 months.
- No more than 40% of total number of credit lines can be 60 days delinquent.
- Must not have had any eviction judgments against him/her within the last five years.
- Must not have more than two (2) bad checks on record within the last two (2) years.
- Applicant's Consumer Report that show the following may be "Approved with Conditions"
 - No record or no credit trade lines
 - Between 40% to 60% of total credit lines showing 60 days delinquent
 - Discharged Chapter 7 bankruptcy
 - Discharged Chapter 13 bankruptcy
 - Public records for Child Support, Civil Judgments, foreclosures, garnishments, and tax liens with the exception of judgments for eviction
 - Three or less credit lines that are 90 to 120 days delinquent
- Applicant must not have been convicted for the manufacture or distribution of controlled substances or any violent felonies. Additionally, more than three violent misdemeanors may be cause for rejection. All rejections based on criminal background may be appealed in the reasonable accommodation process if the crimes are associated with the applicant's disability and will be considered on a case-by-case basis.
- Rental History/landlord references are requested and if they are not available, applicants will be asked to provide personal references, other than family members. Requested references can be provided by staff of a homeless shelter, other homeless service providers, social workers or others involved with the applicant in a professional capacity, together with as much information as possible about where the applicant has been living for the past five years. Landlord, personal or other references must indicate the ability to care for the property and pay rent on time, as well as the ability to live peacefully with neighbors and refrain from behavior that jeopardizes the safety, security and peaceful enjoyment of the community. The landlord reference check is conducted to determine that an applicant has:
 - Demonstrated the ability to pay rent on time and in full
 - Follow the rules and regulations outlined in the rental agreement
 - Kept their residence in a clean, sanitary and undamaged manner
 - Behaved as a good neighbor and tenant with no notices for lease

violations

- c) In person interview with the potential tenant is conducted by the Resident Manager.
- d) Property management staff will observe applicant during the interview process and note tenant behavior and appropriateness.
- e) Once the application process is complete and if an applicant is approved, the applicant and the FSP will be contacted to schedule a move-in date.

Fair Housing Policy

WSH will comply with all federal, state and local fair housing and civil rights laws and will not discriminate against any prospective resident on the basis of the fact or perception of their race, religion, creed, national origin, age, color, sex, physical or mental disability, marital status, domestic partner status, ancestry, actual or perceived sexual orientation, gender identity, medical condition or any other consideration made unlawful by Federal, State or local law. All criteria shall be applied equitably and all information considered on an applicant shall be related solely to the attributes and behavior of individual members of the household as they may affect residency.

Notice of Decision and Appeals Process

WSH will contact all approved applicants by phone and/or in writing with details regarding the specific move-in date and will work with DBH to assist the tenant in making arrangements for completing the move-in process.

Applicants will be given written notification of assignment to the waiting list or reason for denial after consideration of the rental application after final processing. All notices of denial will include information on the right to appeal and a reminder notice of the right to reasonable accommodation for disability. A copy of any denial notice for MHSa enrolled applicants will also be sent to the referring case worker at DBH.

If a rental application is denied, the applicant has (14) fourteen calendar days after the date of denial letter to submit a written appeal to WSH.

WSH will consider any mitigating circumstances that the applicant feels would have an effect on the decision. The written appeal must consist of documentation refuting the stated reason for rejection of the application or supporting mitigating circumstances to be considered for the appeal. If a letter of denial is sent to an applicant and no response is received within (14) fourteen calendar days, WSH will close the file permanently.

Notification will be provided to the applicant regarding the final decision on the appeal within (14) calendar days of receiving the applicant's written appeal notice. A copy of the final decision letter will also be mailed to the referring DBH case worker at the same time.

Reasonable Accommodation

Applicants will be provided with a notice as part of the application package which outlines their right to a reasonable accommodation as well as their right to appeal screening decisions. Management will offer applicants with disabilities additional consideration if said accommodation will enable an otherwise eligible applicant or tenant with a disability an

equal opportunity to access and enjoy the housing program. Note that management is not, however required to make a reasonable accommodation or physical modification if the accommodation or modification will result in an undue financial burden to the property or if it requires management to alter or change a basic component of the housing program.

All background information obtained from credit reports, criminal history reports and/or landlord or other personal references will be considered in light of the project's commitment to provide housing for people in transition and with special needs. Applicants with negative background information will have the opportunity to demonstrate that past behavior causing those issues was related to a disability and request a reasonable accommodation. In addition, the availability of supportive social services that can assist the applicant in meeting the conditions of tenancy will also be considered in evaluating such information before a decision on an applicant's assignment to a MHSa unit.

Item D.7 Supportive Services Plan

NOTE: A tenant's participation in supportive services may not be a condition of occupancy in MHSAs units.

Describe the development's approach to providing supportive services to MHSAs tenants. The following information should be provided:

1. A description of the anticipated needs of the MHSAs tenants;
2. The supportive service provider's initial and ongoing process for assessing the supportive service needs of the MHSAs tenants;
3. A description of each service to be made available to the MHSAs tenants, to include where and how the service will be delivered, the frequency of the service delivery and identification of the service provider. A description of the available services and supports should include, but not be limited to:
 - a) Mental health services
 - b) Physical health services (including prevention programs)
 - c) Employment/vocational services
 - d) Educational opportunities and linkages
 - e) Substance abuse services
 - f) Budget and financial training
 - g) Assistance in obtaining and maintaining benefits/entitlements
 - h) Linkage to community-based services and resources
4. Indicate whether or not there will be an onsite service coordinator, and include the ratio of onsite staff to MHSAs tenants. If there is no onsite service coordination, provide a description of service coordination for the development;
5. A description of how services will support wellness, recovery and resiliency. It is anticipated that the supportive services plan for the development will include services that are facilitated by peers and/or consumers. If this is not part of your service delivery approach, please provide an explanation;
6. A description of how the MHSAs tenants will be engaged in supportive services and community life. Include strategies and specific methods for engaging tenants in supportive services and the frequency of contact between supportive services staff and MHSAs tenants. This description should also include the identification of staff (the responsible service provider) and specific strategies for working with MHSAs tenants to maintain housing stability and plans for handling crisis intervention;
7. If the Development is housing for homeless youth, provide a description of services to be provided to meet the unique needs of the population including engagement strategies and peer involvement. In addition, provide a description of how transition-aged youth MHSAs tenants will be assisted in transitioning to other permanent housing once they reach 25 years of age;
8. Supportive services must be culturally and linguistically competent. Describe how services will meet this requirement including, when necessary, how services will be provided to MHSAs tenants who do not speak English and how communication between the property manager and the non-English speaking MHSAs tenants will be facilitated;

9. Describe the process to ensure effective communication between the service provider and the property manager regarding the status of MHSA tenants in the development and any other issues regarding the development, including but not limited to regularly scheduled meetings and the identification of a single point of contact for communication and coordination of supportive services; and,
10. If proposing to develop Shared Housing units within a Rental Housing Development, attach "House Rules".

Response:

SUPPORTIVE SERVICES PLAN – LUGO SENIOR APARTMENTS

It is the primary objective of the *Age Wise Supportive Services (AWSS)* program to support the individual in maintaining tenancy. The overarching principles of the MHSA housing service plan are client/tenant choice and that services are voluntary. The supportive services program will assist older adult resident consumers to maintain self-sufficiency, succeed in their wellness, reduce hospitalizations, reduce incarcerations, increase employment, and successfully re-integrate into the community.

Service Needs of the Target Population

The target population for this project consists of ten (10) Older Adults, who have been diagnosed with a serious mental illness and who are homeless or at risk of homelessness. The Older Adult population, in general, faces some unique issues that can cause increased difficulty in providing services. Some of the particular difficulties faced by the Older Adult Population include depression due to chronic health deterioration and loss of family & peers, sleep problems, and isolation (both physical and social). To address these particular difficulties, AWSS has developed a comprehensive plan consisting of case management, assessment, psychiatric care, mental health services, educational and social services, co-occurring disorder services, crisis intervention, medical support and housing support services. These combined services are intended to help tenants to maintain self-sufficiency, succeed in their wellness, reduce hospitalizations, reduce incarcerations, increase housing stability, and successfully re-integrate into the community. While the specific level of care of each tenant will be dependent on that tenant's need and desire for services, AWSS has tailored a plan that can be both flexible and comprehensive to address all needs as they arise.

Overview and Description of Services

The services and goals will be developed in partnership with the older adult resident consumer and will be directed towards utilizing a strengths-based approach. Services will be directed towards supporting the older adult resident consumer in maintaining long-term housing. A multi-disciplinary team, including peer and family advocates and staff reflecting the ethnic and cultural make-up of the resident consumers will provide the services. These bi-lingual services will be provided both on-site and off-site and occur with a frequency that is individually determined, but no less than weekly. Supportive services staff will also assist the older adult resident consumers in accessing County and other outside services as appropriate to meet all of the resident consumer's needs. Assertive engagement focusing on developing relationships and trust shall be provided to those individuals who decline services.

While all services will be voluntary, a range of mental health services shall be offered and

provided to all MHSa eligible tenants who express desire for such services. The core supportive services will include:

- Access to psychiatric services: assessments, evaluation & medication management
- Mental health treatment, case management and independent living skills development
- Crisis intervention and follow up care
- Dual Diagnosis support groups and individualized treatment options for resident consumers who experience challenges with substance use
- Emergency assistance with food and clothing as needed
- Individual goal/service planning
- Weekly Wellness psycho- education groups
- Assistance in accessing and keeping mainstream benefits
- Assistance in accessing public health services
- Assistance in accessing public transportation
- Money management and financial education
- Employment services and opportunities
- Family and other support system interventions

The Adult System of Care (ASOC) will provide all direct mental health maintenance and case management services. All psychiatric services and medications will be provided by the outpatient clinics of the San Bernardino Department of Behavioral Health. ASOC will use a multidisciplinary team-based approach that will provide treatment, rehabilitation and support services. Staffing will meet the service needs and access to afterhours care will be provided as dictated by the resident consumer's needs.

The 10 older adult resident consumers will also be able to access the county's Public Health Clinics for regular medical assessments, referrals and appropriate treatment. On a regular basis, each older adult resident consumer's case will be reviewed to discuss issues of treatment and progress. The multi-disciplinary team will provide on-going assistance with independent living skills, individual and family counseling, and assistance and education with medication self-management. Case management is a crucial service that is shared by the entire team; on any given day, one team member is the on-site, on-call coordinator. All members of the service team become familiar with all the older adult resident consumers and every team member is prepared to step in and coordinate service and case management on any given day (or night). The majority of services will be provided at the Lugo Senior Apartments although other county facilities and programs may be used as dictated by program needs.

In addition to the direct services described within this section, AWSS will partner with EngAGE, who will provide comprehensive, voluntary community services to all tenants of the development through their resident services coordinator. EngAGE is experienced in delivering life-enhancing programs to low-income seniors and will provide a complementary set of services when placed next to the FSP services. Additionally, EngAGE will provide an additional linkage to a network of providers of all aspects of senior services in the region. Since EngAGE services will be offered to all the residents of the Lugo Senior Apartments project, they will be a valuable resource to assist AWSS in fostering a sense of community in the resident consumer and integrating the resident consumer into their new

social environment.

Promoting Recovery, Work and Self-Sufficiency

The older adults served by this housing program will be individuals with complex and long-term social and medical issues. Each person's history of homelessness and untreated disabilities will require an individualized approach to assessment of needs and goals. Resident consumers are assisted to gain the skills needed to make choices that reflect their own values, preferences, and goals: support systems will be developed to meet each person's needs and to empower each individual to attain their highest level of independence and employment. The program assists resident consumers in developing and refining community living skills through individual as well as peer support. Resident Consumers will be assessed, referred and supported in the development of independent life skills such as apartment maintenance, money management, cooking and shopping. Resident consumers will also be assessed, referred and supported in accessing employment resources in the community and supported in obtaining their career goals.

Strategies and Assistance with Maintaining Housing and Supporting Wellness, Recovery and Resiliency

Employing the "strength-based" approach allows staff to identify what is needed to support the resident consumer in maintaining his/her housing. Beginning where the individual is in his/her recovery will identify where to start and focus. This usually begins with the fundamentals – an income and health assessment. If not done already, applications for financial and health care benefits shall begin as soon as possible. Further, the range of services as described above shall be offered. A strength-based approach that encourages and supports choice, empowerment and focusing on the strengths of the individual has proven successful in recovery, fostering resiliency and the promotion of wellness. Based on the tenants' wishes, employment opportunities and supports will be made available, including assistance with transportation, job coaching and any other items that will be important for the tenant to be successful. Educational supports shall also be made available by assisting the resident consumers in enrolling and completing educational programs. In supporting tenancy retention, service staff shall be available 24/7 to respond to crisis or other tenant issues requiring this level of support. Working with the tenant and the property management staff when behaviors have been identified that place the tenant at risk for potential eviction will proactively support both the tenant and the property management in avoiding this decision.

Communication

The AWSS Program Manager/designee is expected to be the primary point of contact between AWSS and Property Manager, Western Seniors Housing. AWSS and the property manager will have regularly scheduled meetings, not less than once per month, to ensure adequate communication and to address any tenant issues. AWSS and the property manager will meet on-site and coordinate goals that will lead to tenant housing stability. The focus of the meetings will be to maintain open communication and a collaborative relationship between AWSS and the property manager which will lead to optimal housing outcomes for tenants and take advantage of the resources that are available. AWSS will also coordinate on a regular basis with the community services coordinator, EngAGE to synchronize services to assure the resident consumer has adequate opportunities for

community interaction.

Item D.8 Supportive Services Chart (Attachment C)

Submit the Supportive Services Chart (**Attachment C**). The Chart must list all services that will be provided to MHSA tenants, including any in-kind services essential to the success of the Supportive Services Plan.

Item D.9 Design Considerations for Meeting the Needs of the MHPA Tenants

Describe the following:

- 1 Physical space, including common areas, outdoor areas, landscaping, physical access to the property, security;
- 2 Supportive services space (if any), including any quiet area on site for tenants to meet service staff;
- 3 How the MHPA units will be designed to provide appropriate accommodations for physically disabled MHPA tenants, if appropriate.

Response:

Physical Description of the Development

Lugo Senior Apartments is a major rehabilitation project that will renovate the improvements of 11 buildings on a 3.32 acre lot in San Bernardino, CA and convert it into 119 one and two-bedroom rental apartments for very low- and low-income seniors. 10 of the units will be two-bedroom units of approximately 777 square feet, and the remaining 109 will be one-bedroom units of approximately 542 square feet. Within this community, 10 MHPA Housing Program units will be made available for extremely low income Older Adults with Serious Mental Illness and interspersed throughout the tenant population. The entrance to the property will be limited to access off of 9th street with gated and secure access provided to all tenants.

To help achieve our goal of providing safe and affordable housing, the current property will undergo a substantial rehabilitation, which is anticipated to include the following work:

- Installation of all new energy-efficient windows
- Metal entrance doors to each unit including weather stripping
- Reroofing of all buildings
- Intensive landscaping and improved irrigation
- Construction of a new community building with offices and community space
- Addition of a small gym and workout area
- Painting of all interior and exterior surfaces
- Repair and resurfacing of asphaltic paving in the parking and driveway areas
- Termite treatment
- Repair/replacement of plumbing pipes and fixtures where necessary
- Security gates at each building
- Construction of a new pool and cabana area
- Construction of a new iron fence around the property
- Installation of new cabinets and appliances
- Window treatments, new countertops and water heaters
- Repair and replace of HVAC units where necessary
- Cable wiring
- Site and building lighting
- Security features, including security video cameras various locations throughout the property

All units will have their own individual bathroom and kitchen. Each kitchen will include a sink, refrigerator, and range/oven combination. Storage will be provided, with upper and lower cabinetry. Following the completion of the rehabilitation the property will include amenities such as a new community multi-purpose room, fitness area, new pool and cabana, increased accessibility to all areas of the property, lush landscaping, grass covered areas, trees and bushes around the perimeter, small lawn for bocce ball or outdoor events, and covered/uncovered parking. The property is located near several important amenities, including El Super Supermarket, Secombe Lake park, multiple fast food and sit down restaurants, library and a variety of retail stores. The Inland Family Community Health Center is also located within 1 mile of the property and the nearest Behavioral Health clinic (Phoenix Clinic) is within 2 miles. The site is within 500 feet of the Omnitrans Bus Stop for Lines 7 and 15. At peak hours Omnitrans buses 7 and 15 arrive in approximately 20 to 30 minute intervals. The Omnitrans public transportation system routes extensively throughout San Bernardino and the entire Inland Empire providing public transportation access to most areas in the region. Specifically, Omnitrans provides public ground transportation service throughout the neighboring cities of Fontana, Chino, Rancho Cucamonga, Upland, Montclair and Ontario.

Spaces for Delivery of Supportive Services

The project will promote tenant interaction with the placement of property management, residential services coordinator and FSP caseworker office spaces, a computer room, and one large flexible community room, totaling approximately 2,000 sq. ft. including a small kitchen with a stove and refrigerator. The building is designed to provide a safe environment for tenants to live and learn new skills while reengaging society. The space will also provide an opportunity to participate in community sponsored activities that will be designed to develop a sense of community and be the central hub for life-enhancing educational and social interaction activities provided by the resident services coordinator, EngAGE. The project will respond to the unique needs of these target populations by providing intensive case management through the FSP (AWSS) which will connect residents to the full range of support services they need to gain increased independence and remain stably housed, including: safe and secure housing environment, linkages to health and dental care, mental health care, after school tutoring, job & educational services, life skills workshops, and more. The FSP provider will be able to provide services within the individual units or use one of the offices and/or community room space to provide a safe quiet place to render services. EngAGE will supplement the FSP services by providing a linkage to a network of providers of all aspects of senior services in the area. In addition EngAge will provide access to a complete array of existing community support services such as transportation coordination, mental health services, healthcare, adult day health, personal care services, health education, meals on wheels and others, on-site classes to engage seniors in healthy living. EngAGE's programs will change on a semester basis and be targeted to the needs expressed and reflected by the community.

Features for physically disabled participants of the MHSA Housing Program

The new community center, pool area, and cabana within the development will be accessible to physically disabled persons including access controls, door widths, turning radius within rooms, lighting controls, emergency signals, ramps and floor slopes. All ground floor unit entrances will be minimally accessible for physically disabled using wheelchairs and mobility devices of sizes anticipated within California Building Code standards. The project will provide a new elevator and walking decks, which will provide minimal access for the physically disabled using wheelchairs and mobility devices of sizes anticipated within the California Building Code standards, to the existing second floor units.

The owner and management agent of these apartments are prepared to meet the reasonable accommodation requests of residents and potential residents to modify the equipment and features of the rental units (excluding the room dimensions, door sizes, and/or wall locations) in order to better meet the unique needs of physically disabled residents.

Supportive Services Chart

List all the services to be provided to MHSA tenants in the MHSA Rental Housing Development, including any in-kind services essential to the success of your Supportive Services Plan. Add additional lines to the Supportive Services Chart as needed.

Supportive Service		Target Population	Service Provider(s)	Service Location
List each service separately (e.g., case management, mental health services, substance abuse services, etc.)		Name the target population(s) that will be receiving the supportive service listed.	List the name of the proposed service provider.	Indicate where the service is to be provided - onsite or offsite. For offsite services, indicate the means by which residents will access the service.
1	Comprehensive Assessment	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
2	Psychiatric Evaluation and Medication Support	Older Adult	Adult Residential Srvcs Clinic.	On-site or Off-site (transportation assistance)
3	Development of Coordinated Care Plan	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
4	Ongoing Case Management	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance))
5	Mental Health Services	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
6	Individual and Group Psychosocial Rehabilitation	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
7	Social Skills Development	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
8	Life Skills Development	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
9	Dual Diagnosis Group	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
10	New tenant orientation/move-in assistance/tenant rights education	Older Adult	DBH Housing Program	On-site or Off-site (transportation assistance)
11	Tenants council	Older Adult	DBH Housing Program	On-site or Off-site (transportation assistance)
12	Psychiatric services	Older Adult	Adult Residential Srvcs Clinic.	On-site or Off-site (transportation assistance)

MHSA Housing Program Rental Housing Application

ATTACHMENT C

13	24/7 Crisis intervention	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
14	Information and referrals to other services and programs	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
15	Peer mentoring/support	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
16	Transportation (Assistance to access only)	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
17	Recreational/socialization opportunities	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
18	Independent living/life skills: budgeting, money management, meal preparation, housekeeping, self-care	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
19	Benefits assistance	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
20	Relapse prevention planning	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
21	Community engagement and linkages	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)

Primary Service Provider:	Age Wise Supportive Services (AWSS)
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(Indicate the primary service provider, i.e., entity responsible for providing services to the tenants of the MHSA Housing Program units, and for overall implementation of the Supportive Services Plan, including coordination between multiple service providers where applicable.)