

County of San Bernardino - Department of Behavioral Health



County of San Bernardino Department of Behavioral Health

San Bernardino County Mental Health Services Act (MHSA) Housing Plan Update

June, 2010

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San Bernardino County MHPA Housing Plan Update

1. Introduction and Purpose of the MHPA Housing Plan Update

At the writing of this MHPA Housing Plan update, the United States is experiencing an unprecedented financial crisis that has seriously impacted the housing development industry. Wide fluctuations in housing stock, including an expanding foreclosure market, and a general inability to adjust to economic impediments have made economic forecasts austere. Though the national problems started with irresponsible investments and risky sub-prime mortgages which lead to the “housing bubble” bursting, the problems have widened as a result of unemployment, wild housing price adjustments, debt and lack of financing options. The national crisis in the credit, banking, currency, and investment trading markets has caused leading banks and insurance companies to declare bankruptcy, or merge with other institutions, due to extraordinary credit restrictions. Even financial giants, like the so-called "too big to fail" institutions have floundered despite federal bailout activities. With very few corporate profits left to invest, the great driver of affordable housing development, the tax credit program, has stalled. The abrupt disappearance of this significant source of funds has challenged affordable housing developers, supportive housing sponsors and their partners to attempt to identify viable approaches to continue unit production in these unprecedented and historic financial times. Additionally, a potentially significant source of affordable and supportive housing funds for San Bernardino County, the California Multifamily Housing Finance Program (MHP) which passed as Proposition 1C and set aside \$2.85 billion in affordable housing bond financing, is expected to have distributed all authorized funds by July 2010; leaving very few funding options for affordable housing developers in San Bernardino County.

The real estate industry in general, but affordable housing in particular, suffers greatly from an inability to obtaining financing. Unlike for-profit market rate housing, where developers borrow a large portion of funding from banks, and rents are sufficient to support debt service and operations, supportive housing development relies heavily on multiple layers of public financing to make the deals work. Supportive housing developers must address many different challenges to achieve financial viability and demonstrate adequate funding in three categories: capital development, operating subsidy, and supportive services. Typically, state and local funds are used to supplement federal financing for affordable housing, but local funding sources for capital, operating and supportive services supplied by city, county, state and federal governments have seen drastic cutbacks in California, and nationwide as general revenues decline. Additionally, with the decrease in private giving from individuals, foundations, and corporations, many housing developers find themselves with fewer cash resources and less internal capacity to pursue new multi-family rental housing endeavors.

Along with the credit, banking and real estate troubles, U.S. families have suffered from quarter after quarter of declining net values that has led to a deepening and widening of the current recession. Punctuated by steep unemployment and rapidly decreasing value of their homes and investments, U.S. families are struggling to make ends meet. The result is that communities across the nation are experiencing increases in the number of homeless – especially families who are becoming homeless for the first time.

The fallout from the economic crisis continues now on a national and global basis, as soaring unemployment rates are reported across all states, and major businesses continue to forecast bleak profits. In California, Governor Schwarzenegger characterized the state's financial condition as "...the greatest economic crisis since the Great Depression." State tax revenues have declined leaving California with a \$19.1 billion dollar budget deficit to overcome in the 2010-2011 fiscal year.

In San Bernardino County, economic conditions were difficult as well. The county's unemployment rate climbed to 14.8% (as of March, 2010), which is approximately 3-5% higher than California state averages over the same time period. Meanwhile, home values continued their freefall with an additional 12% decline over the previous year's unprecedented 48% decline. The increase in foreclosures has created large numbers of vacant properties in San Bernardino County communities. Federal stimulus funds from the American Recovery and Reinvestment Act have not yet made a major impact on local economies, and most economists expect that the current downturn will have long-range impacts.

In the context of these national, state and local economic challenges, and despite the flagging economy San Bernardino County has continued to work hard to position itself to make significant progress in planning and implementing the MHSA Housing Program during 2009 and 2010. MHSA housing funds have become an even more critical resource in the creation of affordable supportive housing, as they are now a primary source of funding rather than just one of many pieces of the service resources in the County. Similarly, economic impacts on the housing industry have created challenges for developers who are considering participation in the MHSA Housing Program. Nonetheless, this report will demonstrate that innovative solutions and a willingness to collaborate, combined with political will have helped San Bernardino County develop the critical building blocks for a successful plan to develop and manage housing for persons with mental illness.

In the second year of this program, the following important steps have been accomplished. Details on these activities and achievements are provided in the body of this report.

- Creation of Tenant Certification and Referral Process through an intensive consultation process with consumers, family members, service providers
- Initial draft of a template MOU between County Behavioral Health, a developer, service provider and property manager
- Complete posting, approval by Board of Supervisors, and application submittal for the first proposed MHSA housing project with ten units for older adults with mental illness (anticipated approval by the state in June 2010).
- Completion of six trainings to build the capacity of developers and service providers
- Updates and refinement of MHSA Housing Program Guidelines for Application
- Assist in the Annual Homeless Summit
- 98 developers participated in developer workshops and are eligible to apply for MHSA Housing funds

Plans for year three of the MHSA Housing Program are outlined in this report. Building upon the elements created in the first and second year, San Bernardino County Department of Behavioral Health expects to complete applications that will bring it closer to fulfilling the 150-unit goal for MHSA Housing.

The MHSA Housing Program continues to receive strong inter-agency support within the County through the ongoing active participation of all of the collaborative MOU partners through monthly meetings and coordinated planning. For example, the latest HOME NOFA application encouraged developers to apply for MHSA Housing funds in addition to local HOME funds. This strategy opened the door for the Horizons at Yucaipa project, the first MHSA Housing project to be submitted to the state for approval. Continued efforts to implement recommendations in the 10-Year Strategy to End Homelessness shows that there is strong political will to address the homeless issues in the County despite budgetary setbacks. Recommendations contained in the 10-Year Strategy dovetail with areas of MHSA work: interagency collaboration, discharge planning, and creation of permanent supportive housing. In fact, creation of permanent housing units is the second priority listed in the plan. The Executive Summary of the Plan states clear support for the development of permanent supportive housing:

“It is less expensive to provide permanent supportive housing to chronic homeless persons than to continue to provide costly services while they live on the streets year-after-year. Permanent supportive housing allows for the stable and monitored provision of services while helping chronic homeless persons maintain housing. Reliance on costly local public services is reduced because they are better able to take care of their health. Finally, by being stably housed, the likelihood of being arrested for quality-of-life related criminal activities is reduced.” (San Bernardino County 10-Year Strategy to End Homelessness, page 2)

In the published Strategy, the San Bernardino County Homeless Partnership 10-Year Planning Committee developed 25 specific recommendations, organized under the following headings:

- Homeless Prevention
- Community Integration Strategies
- Outreach and Engagement System for Chronically Homeless Persons
- Centralized Assessment and Regional Referral and Service Delivery System
- Income and Support Services
- Shorten Homelessness
- Permanent Housing
- Homeless Management Information System (HMIS)
- Measuring Performance

As an additional demonstration of the political will in the County to address homeless issues, and recognizing the need for a multi-faceted approach that drew upon the expertise throughout County agencies and jurisdictions, the County formed an Interagency Council on Homelessness (ICH) that first met in August 2009. The ICH has been instrumental in the creation and adoption of the San Bernardino County 10-Year Strategy to End Homelessness

as well as coordinating the collaboration of resources being applied to solve the homeless problem in the County. ICH voting members include Homeless Management Information System (HMIS), Community Action Partnership, County Supervisors, elected and unelected officials representing a number of cities in the region, law enforcement, County of San Bernardino Department of Behavioral Health, Human Services, County of San Bernardino Department of Public Health, Housing Authority of the County of San Bernardino, probation department, specialty courts representative, Superintendent of Schools, and several at-large (primarily nonprofit) representatives all of whom have been active in gathering support and setting the County agenda to keep homeless issues at the forefront of County policy decisions.

Report on the Coordination of Local Planning with MHSA Housing Efforts:

The County of San Bernardino approved a 10-year Strategy to End Homelessness in June of 2009. The completion of the 10-year Strategy to End Homelessness was the culmination of several years of work with the intent to rid the County of homelessness through a multifaceted strategy that addresses the root causes and the realities of the issues surrounding the County homeless population. With the 10-year Strategy to End Homelessness as a blueprint, the County has made efforts in the past year to directly address and quantify the homeless problem in San Bernardino County. In an effort to quantify the scope of the homeless problem in San Bernardino County, the Office of Homeless Services, in conjunction with CLA & Associates, and over 500 community volunteers, conducted the 2009 San Bernardino County Point-In-Time Homeless Count (PIT) on January 22, 2009. The PIT count is a prerequisite to applying for CoC grant funding from HUD, and can be a critical tool to determine the best use of limited resources. In addition to the PIT count completed in 2009 as required by HUD, the Office of Homeless Services also conducted a voluntary PIT count in January of 2010, which focused on a shelter county within the County. Next, to give stakeholders a direct opportunity to share their ideas and goals to end homelessness in the community, the County of San Bernardino Homeless Partnership hosted the 3rd Annual Homeless Summit on November 9, 2009. The Summit was attended by approximately 150 participants including community and faith-based organizations, educational institutions, non profit organizations, private industry as well as federal, state, and local government representatives and has become an effective platform for raising awareness and building support for programs intended to address homeless problems within the County.

Update on Full Service Partnerships:

San Bernardino County's Department of Behavioral Health has established a system of Full Service Partnerships (FSPs) to provide comprehensive mental health treatment and support to clients throughout the County. These partnerships or FSPs are important for connecting consumers to services in housing, promoting stability in support of recovery. The County has approximately twenty FSPs which are located throughout the County to maximize access to their clients. Furthermore, the FSP's role is crucial to the MHSA housing program because the FSPs will be tasked with certifying eligibility and will be a critical point of contact and support for the clients participating in the program.

Acknowledgement of Contributions During the Second Year:

This report would not be complete without acknowledging the contributions and efforts of the many agency employees, elected officials, appointed officials and other stakeholders during this second year of implementation of the Mental Health Services Act Housing Program in San Bernardino County. In particular, the collaborative efforts of government agencies and mission-driven community partners has lead to a successful year that has seen capacity increase, systems change and has successfully built a pipeline of projects that will begin to be realized in the coming year.

Specific recognition should be given to members of the Technical Review Committee, Executive Committee and Housing Policy Advisory Committee for their dedication to creating the structure and processes' as well as developing collaborations, strategies and opportunities that have significantly progressed the implementation of the MHSA Housing Program in San Bernardino County. Partner agencies represented in the various committees include: Department of Behavioral Health, Department of Community Development and Housing, the Housing Authority, the Office of Homeless Services and the Redevelopment Agency.

Technical Consultants for the MHSA Housing Program are the Corporation for Supportive Housing and LeSar Development Consultants.

2. Report on Completion of Second Year Action Plan

In the second year of implementation of the San Bernardino County Mental Health Services Act (MHSA) Housing Plan, the County had a goal to produce multiple project applications. Additionally, the governance and advisory structure including the Executive Committee, Technical Review Committee and Housing Policy Advisory Committee was expected to manage and implement MHSA Housing programs and leverage available resources to fulfill the goals outlined in the Plan. Specific work-plan tasks for year two included building on the progress and structures defined in year one, and more fully refining the operational aspects of the program.

Activities and achievements fostered during the second year of planning are detailed below.

- 1) Implement recommendations outlined in the MHSA Housing Plan
 - a) Ongoing technical assistance was provided to SBDBH in selecting and recommending MHSA Housing projects for funding, including the development of an internal review checklist and an annual review and update to the San Bernardino MHSA Housing Program Application.
 - b) The pipeline of MHSA Housing Program projects grew rapidly after release of the Guidelines for Application, and in conjunction with the Developer Workshops offered to community partners. 98 distinct developers have attended these workshops and are now eligible to apply for MHSA funding.
 - c) Efforts were made by the administrative and managerial committees to address the identification and capture of additional funding sources for housing development and the provision of supportive services. The most recent HOME NOFA that was released strongly encouraged applicants to include MHSA Housing Program units in their projects.
 - d) The first project submitting a complete pre-application to the County, the Horizons at Yucaipa Senior Apartments with 10 MHSA Housing units, was reviewed by the Technical Review Committee and the Executive Committee. A 30-day posting was completed, the application was approved by the Board of Supervisors, and the full application to the California Housing Finance Agency (CalHFA) and the state Department of Mental Health (DMH) was submitted for review and final approval.
- 2) Created a process to select developments for MHSA housing funds
 - a) A process was created to process project applications as they are received, including development of a project feasibility review process which was implemented to ensure the success of identified developments.
 - b) The MHSA Housing Program Guidelines for Application were released in July 2009 and updated in March, 2010.
 - c) Support was provided to the Housing Policy Advisory Committee (HPAC), Executive Committee and Technical Review Committee; ongoing coordination with County Staff to implement strategies to increase supportive housing resources and services was undertaken.

- d) A standardized process for Tenant Certification and Referral was developed, reviewed and put into operation. The process that was created supports the targeting of potentially eligible mental health clients while complying with MHSA housing requirements and integrating best practices into the selection and referral process.
- 3) Outreach to local jurisdictions for partnership
- a) Efforts were made by the administrative and managerial committees to address the identification and capture of additional local funding sources for housing development and the provision of supportive services including funds from the San Bernardino County Neighborhood Stabilization Program.
- 4) Build capacity to create supportive housing in San Bernardino County
- a) Five training sessions were provided during the year to outline housing strategies, identify available resources, build community support, and to promote collaboration with developers and service providers.
 - b) A forum for community collaboration and training on affordable housing resources titled “Affordable Housing 101” was broadly advertised through newspapers and radio, and offered on October 20, 2009. Affordable Housing 101 was attended by at least thirty-three (33) separate agencies or individual community partners who were interested in collaborating or learning about housing options and Homeless issues within the County.
 - c) Capacity was built through outreach to local agencies, stakeholders and community partners including the 3rd Annual Homeless Summit on November 9, 2009.
- 5) Assist with the siting of MHSA housing developments
- a) Technical assistance was provided to selected projects, including support to SBDBH, project sponsors, service providers (FSP) and property management providers. Support focused on ensuring the creation of effective partnerships and the successful completion of the MHSA Housing Program application for submittal to CalHFA and the California Department of Mental Health.
 - b) The community outreach program was strengthened through support of SBDBH in reaching out to local jurisdictions for partnership. This included developing and implementing an ongoing strategy to engage the leadership of County agencies and local jurisdictions to partner with the County to achieve the units goals outlined in the Housing Plan. Additionally, the outreach process to FSPs and the community provided mental health consumers more opportunities to interact with the MHSA Housing Program and become informed about the application process.
 - c) Efforts were made by the administrative and managerial committees to identify property for development of MHSA Housing that fulfilled the unit production goals of the program while providing maximum leverage of the funding sources identified. In addition, the Technical Review Committee and the Full Service Partnerships worked collaboratively to map community resources important to potential clients, such as transportation corridors and access to employment. This information is helping to identify desirable locations for MHSA Housing projects.

- d) Guidelines and recommendations for operation of successful supportive housing were identified and integrated into the management and advisory meetings and trainings. Topics covered included advice on issues such as compliance with ADA and Fair Housing, successful property management practices, and coordination of property management, leveraging and identification of funding sources and information on supportive services to support housing stability.

3. Implementation Plan for Year Three

In year three of MHSA Housing Program implementation in San Bernardino County, the developmental efforts from the first and second years are expected to produce multiple project applications which will lead to MHSA housing unit production. The existing advisory organizations, including the Executive Committee, Technical Review Committee and Housing Policy Advisory Committee (HPAC), will continue to serve as the catalysts for the implementation of the MHSA Housing Program in San Bernardino. Year three will build on the progress and structures created in previous years by increasing the implementation of processes and continued refinement of the developed procedures to maximize unit production given the unique economic environment throughout the County. Details of year projected three activities are included below.

- 1) Implement recommendations outlined in the MHSA housing plan
 - a) Ongoing technical assistance will be provided to SBDBH in selecting and recommending MHSA Housing projects for funding, including the monitoring and identification of funding sources that make projects viable. The pipeline of MHSA Housing Program projects will be expanded by assisting developers in identifying suitable property that fulfills the MHSA Housing Plan goals. If necessary, additional refinement will be made to the MHSA Housing Program application process to maximize efficiency in processing applications. Capacity will continue to be built through outreach to local agencies, stakeholders and community partners.
- 2) Create a Process to Select Developments for MHSA Housing Funds
 - a) Technical assistance will be provided to ensure applicants are aware of the requirements of the MHSA Housing application processes and to identify areas that can be better adapted to the unique housing environment in San Bernardino County.
 - b) A template for a Memorandum of Understanding that encapsulates the obligations of the MHSA Housing project partners will be finalized, making sure that the document reflects the County philosophy, best practices and mirrors the intent of the existing Tenant Certification and Referral process.
- 3) Outreach to local jurisdictions for partnership
 - a) Efforts will be made by the administrative and managerial committees to identify and capture additional funding sources for housing development and the provision of supportive services.
 - b) Capacity will be built through outreach to local agencies, stakeholders and community partners; administrative and managerial committees will continue to

refine search criteria and identify property for development of MHSA Housing that fulfills the unit production goals of the program while providing maximum leverage of the funding sources that are available.

- 4) Build capacity to create supportive housing in San Bernardino County
 - a) At least four training sessions will be provided during the year, in the form of developer workshops, FSP training and other training. Training will focus on outlining housing strategies, identifying available resources, building community support, and promoting collaboration with developers and service providers.
 - b) Technical assistance will be provided to selected projects, including support to SBDBH, project sponsors, service providers (FSP) and property management providers involved with projects that submit completed pre-applications to the County. Support will be focused on ensuring the creation of effective partnerships and the successful completion of the MHSA Housing Program application for submittal to CalHFA and the California Department of Mental Health.

- 5) Assist with the siting of MHSA housing developments
 - a) Technical assistance will be provided to pipeline developers and SBDBH to identify and develop suitable sites for MHSA units. Specific emphasis will be given to housing types and geographic locations that fit within the Housing Plan's stated preferences and goals for unit production.
 - b) Through continued outreach to local agencies, stakeholders and community partners, potential MHSA housing developments will be identified and paired with suitable development partners.

The San Bernardino County MHSA Housing Plan is meant to serve as a guide for project selection and financing. The Plan, developed with extensive input from stakeholders, provides principles and goals for mental health housing in the county, against which we will weigh the actual projects selected to ensure fidelity to the model. This second annual update conveys progress to date and restates goals for the next year, providing guidance for the work of SBDBH, the HPAC, the Executive and Technical Committees, and the Housing Technical Consultants.

Based on the progress to date, as reported in this document, San Bernardino County is poised for the successful creation of supportive housing for persons with mental illness, providing hope for resilience and recovery.

Appendices

- A) Horizons at Yucaipa 30-day posting
- B) Project Profiles
- C) Sample Planning Map of Clinics in San Bernardino Area
- D) Updated Guidelines for Application

Appendix A

Administration

268 W. Hospitality Lane, Suite 400 • San Bernardino, CA 92415 • (909) 382-3133 • Fax (909) 382-3105



ALLAN RAWLAND, MSW, ACSW
Director

April 1, 2010

Notice of Initiation of 30-Day Public Review Period for Horizons at Yucaipa 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 Horizons at Yucaipa 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:

- Section 4.2.1 – Project overview
- Section 4.2.5 (D.1 through D.5) – MHSA Housing Program supportive housing and services information
- Development Summary Form

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
County of San Bernardino
Administrative Manager
Housing and Employment Program
909 387-8619
Fax: 909 386-8578
dfazekas@dbh.sbcounty.gov

Sincerely,

Signature for Allan Rawland
Allan Rawland, MSW, ACSW
Director



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

**30-Day Posting
Public Review Period for
Horizons at Yucaipa
Under the MHSA Housing Program**

April 1, 2010

DEVELOPMENT SUMMARY FORM
MHSA Housing Program

Development Information

County Mental Health Department: County of San Bernardino Department of Behavioral Health

Name of Development: Horizons at Yucaipa Apartments

Site Address: 12266 Third Street, Yucaipa, CA 92399

Development Sponsor: Urban Housing Communities, LLC

Development Developer: Urban Housing Communities, LLC.

Primary Service Provider: Age Wise

Type of Development: **New Construction** **Acquisition/Rehab**

Type of Building:

Apartment **Shared** **Condominium** **Single** **Other** _____

Total number of units and bedroom types: 61 one-bedroom units and 16 two-bedroom units

Total number of MHSA units and bedroom type: 10 one-bedroom units

Total Cost of MHSA Units: \$2,800,000 (approximately)

Amount of MHSA Funds Requested: \$839,160

Requested MHSA funds for Capitalized Operating Subsidies: **YES** **NO**

Square footage by bedroom of MHSA units: 641 Sq. Ft. (approximately)

Contact Information: Douglas M. Fazekas
 County of San Bernardino
 Administrative Manager
 Housing and Employment Programs
 (909) 387-8619
 Fax: (909) 386-8578
dfazekas@dbh.sbcounty.gov

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

Section 4.2.1-Project Overview

Horizons at Yucaipa
12266 Third Street
Yucaipa, CA 92399

Residential and Community Building Descriptions

Horizons at Yucaipa is a new construction project which will provide 77 senior apartments (76 affordable and one management unit) and a community center situated on approximately 4.94 acres. The project will consist of 1 two-story building which will provide 61 one-bedroom apartments with approximately 641 net square feet, 16 two-bedroom apartments with approximately 940 net square feet, and a 2,450 square foot community center. Affordability will range from 30% - 60% of the area median income.

Horizons at Yucaipa has been designed with a community room which includes a full kitchen, computer lab, on-site leasing/manager office, media room, barbeque/picnic area, one large laundry room containing 6 washers and 6 dryers and one smaller laundry room containing 4 washers and 4 dryers, a swimming pool and a spa in an architectural style that reflects and enhances the surrounding neighborhood. There will be two elevators which provide for second-floor access. Apartments include a covered patio/balcony, dishwasher, refrigerator, range, garbage disposal, ceiling fan, washer/dryer hookups and are wired for cable television. The project will also include solar power to provide electricity to the community room, pool, spa and all units. Adequate parking for the residences is included in the overall site plan and includes open and detached carport spaces. The grounds including the courtyard, patio, walkways, recreational and perimeter areas, will be natively landscaped, which requires less maintenance and lower costs, while enhancing the beauty of the neighborhood.

Ten, one-bedroom units interspersed throughout the complex will be designated for the MHSA tenants. In addition, the project will be submitting for additional entitlements to add an office/meeting space specifically for MHSA tenants and AWSS, the service provider.

The project is ideally located due to the Horizon at Yucaipa's extensive access to amenities. Asaderos Super Market, Wal-green's pharmacy, Omnibus bus stop, the Yucaipa Senior Center and Center Park are within ¼ of a mile of the project.

Unit Mix

Type	Units	%
One-bedroom	51	67%
One-Bedroom MHSA units	10	13%
Two-bedroom	15	20%
Two-bedroom/Mgmt Unit	1	
Total	77	100%

Tenant Characteristics and Housing Servicing Goals

Horizons at Yucaipa will include 76 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. Ten of the 61 one bedroom units will be designated as the MHSA Housing Program's permanent supportive housing for eligible older adults with serious mental illness, as defined by MHSA program definitions. 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 Hyder Property Management Professionals as property manager and require an on-site Resident Manager and a maintenance staff. The Resident Manager will meet regularly with the MHSA Full Service Provider, 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 Horizons at Yucaipa MHSA 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.

Rental Levels

Type	Units	Net Rents
One-bedroom MHSA 25%	6	\$365
One-Bedroom MHSA 30%	4	\$365
One-bedroom 40%	11	\$448
One-Bedroom 50%	26	\$573
One-bedroom 60%	14	\$698
Two-bedroom 30%	3	\$378
Two-bedroom 40%	3	\$541
Two-bedroom 50%	6	\$668
Two-bedroom 60%	3	\$813
Two-bedroom/Mgmt Unit	1	
Total	77	

Primary Service Provider

Horizons at Yucaipa has partnered with Age Wise Supportive Services (AWSS), a Full Service Partnership operated by the County of San Bernardino Department of Behavioral Health. Age Wise Supportive Services assists 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.

Other Development Partners

Horizons at Yucaipa is a partnership of Urban Housing Communities LLC and Western Community Housing. Urban Housing Communities LLC has extensive experience in the development of affordable rental housing throughout California. Since 2004, UHC has developed more than 400 units of affordable multi-family and senior housing and will break ground on 254 units this year. UHC executives have experience developing over 750 affordable housing projects and more than 35,000 units. 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. Additionally, WCH provides Service Programs that expand low-income residents' opportunities to live a richer life.

Development Financing

Financing for Horizons at Yucaipa includes (approximately):

Permanent Loan	\$	5,000
Developer Equity		-
HOME Funds		2,000,000
City Loan		2,635,310
City Deferred Impact Fees		1,193,666
MHSA		839,160
Solar Tax Credits		-
Federal Tax Credit Proceeds (9%)		<u>14,865,306</u>
TOTAL SOURCES OF FUNDS		<u>\$ 21,538,442</u>

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

**Section 4.2.5 (D.1—D.5)
MHSA Housing Program
Supportive Housing and Services Information**

Section D1: Consistency with Three Year Program and Expenditure Plan

The County of San Bernardino Department of Behavioral Health (DBH), through the *Fiscal Year 2009-10 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 this age group. 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 Horizons at Yucaipa Apartments directly 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.

Horizons at Yucaipa Development Responds to Identified Need for Older Adult Housing
Urban Housing Communities, LLC 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 Horizons at Yucaipa Apartments. The Horizons at Yucaipa Apartments will provide ten (10) one-bedroom units of permanent supportive housing for ten (10) MHSA-eligible Older Adult clients within the larger seventy-seven (77) unit development. Horizons at Yucaipa 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 Horizons at Yucaipa Apartments are detailed in section D.4 of this notice.

Section D2: Description of Target Population to be Served

The Horizons at Yucaipa Apartments will provide 10 units of permanent supportive housing for Older Adults (aged 60+), 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 Horizons at Yucaipa Apartments will be age 60 or older with a diagnosis of serious mental illness (SMI). They 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.

Section D3: Tenant Selection Process

Horizons at Yucaipa will designate ten, 30% AMI one bedroom units for Older Adult MHSA housing out of the total of 77 units. The MHSA units will be dispersed throughout the property.

Additional space will be available to provide an office/ meeting area with supportive services specifically for MHSA tenants. The MHSA tenants will also have access to the Horizons at Yucaipa community room, pool and garden areas, as well as the services provided to all tenants.

Hyder Property Management Professionals will act as property managers for the Horizons at Yucaipa project. Hyder Property Management has over 40 years experience providing quality property management for both affordable housing and 14 years experience providing supportive housing in California. With an active management portfolio of over 5700 units, Hyder Property Management provides strong property management expertise to the Horizons at Yucaipa team. Hyder Property Management will draw on its significant expertise in working with special needs tenants in partnership with Age Wise Support Services to ensure maximum available support to MHSA eligible applicants as they complete the application process. This experienced team approach offers flexible and responsive assistance as applicants negotiate the tenant selection process.

Notification of Unit Availability

As MHSA Housing Program units become available, the prospective tenants are notified through the following process:

1. Hyder Property Management Professionals (Hyder Property Management), the property manager, will coordinate with AWSS to fill vacancies in MHSA units with applicants that meet the MHSA criteria and are enrolled in the County's Full Service Partnership (FSP) program.

2. Prospective tenants apply for tenancy at Horizons at Yucaipa after being referred by AWSS. The prospective tenant, if not referred by AWSS, will be directed to the FSP, AWSS, for certification of eligibility for MHSA housing. AWSS will provide confirmation of MHSA housing unit eligibility to the applicant and Hyder Property Management if the applicant meets the MHSA Housing Program criteria.
3. Horizons at Yucaipa will maintain a site specific wait list, keeping it current by contacting the prospective tenant/AWSS on a regular basis, per the Horizons at Yucaipa property management plan, to inquire about their continued interest in a MHSA funded unit.

Project Waiting List

Horizons at Yucaipa screening protocol is outlined in section D.13 of the MHSA Housing Program application. Applications will be processed in the order in which they are received. If no units are available, eligible applicants will be placed on Hyder Property Management's Horizon at Yucaipa waiting list, upon favorable pre-qualification. Favorable pre-qualification does not assure, nor imply, that an application will be approved or that Hyder Property Management is preparing a particular application for a unit that may be available. Additional tenant selection criteria, as outlined in the Hyder Property Management tenant selection plan, shall also apply.

Property Management Screening

The MHSA FSP enrolled applicant will be screened by Hyder Property Management and is expected to include review of the completed Hyder Property Management housing application.

Applicants successfully passing this screening will be subject to third party income verification and review of landlord and/or references. If the potential tenant is acceptable at this point, a credit report, and criminal history check will be performed. If the credit report and criminal history check are both acceptable, verification of MHSA eligibility from AWSS will occur as the last step for obtaining a specific available unit. Hyder Property Management and AWSS will work collectively to determine reasonable accommodations that may be helpful to ensure MHSA-eligible applicants with disabilities are able to access the MHSA designated units.

Screening Assistance for the Applicant

AWSS, the FSP to tenants at Horizons at Yucaipa, will provide all necessary support during the screening process, including, if desired by the applicant, assistance to the applicant in completing the required paperwork, securing required documentation, and accompanying the applicant during interviews with Hyder Property Management staff.

References

If landlord references are not available, personal references, other than family members, will be required. Required 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 peacefully cohabit with other tenants. The landlord reference check is conducted to determine that an applicant has:

- Demonstrated an ability to pay rent on time and in full
- Follow the rules and regulations outlined in the lease agreement
- Kept his or her residence in a clean and sanitary manner
- Kept his or her residence undamaged
- At no time received a notice for lease violation(s)
- Behaved as a good neighbor and tenant

Notice of Decision

Hyder Property Management will provide applicants written notification of assignment to the waiting list or reason for denial after consideration of the housing application. The applicant will also be given written notification by Hyder Property Management of specific occupancy date or reason for denial 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 AWSS and DBH. In the event of successful application for housing, AWSS will be available to assist the tenant in making arrangements for and completing the move-in process.

Fair Housing

Hyder Property Management will comply with all federal, state, and local fair housing and civil rights laws, as well as with all equal opportunity requirements during marketing, rent-up, and ongoing operations. Hyder Property Management is committed to requirements of Title VI of the Civil Rights Act of 1964, Title VIII and Section 3 of the Civil Rights Act of 1968 (as amended by the Community Development Act of 1974), Executive Order 11063, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, Fair Housing Amendments of 1988, and legislation which may subsequently be enacted that protects the individual rights of residents, applicants, or staff.

Hyder Property Management will not discriminate against prospective residents on the basis of the fact or perception of their race, religion, creed, national origin, age, color, sex, blindness, or other physical or mental disability, marital status, domestic partner status, ancestry, actual or perceived sexual orientation, gender identity, AIDS, AIDS-Related Complex, HIV, medical condition, height, weight, political affiliation or other consideration made unlawful by Federal, State or local law.

Hyder Property Management will not discriminate against prospective residents on the basis of their receipt of, or eligibility for, housing assistance under any Federal, State, or local housing assistance program. Hyder Property Management will not discriminate against those using Section 8 certifications or vouchers or other rental

assistance, and applicants with such rental assistance must meet all eligibility requirements. Hyder Property Management will work closely with legal counsel and regulatory agencies throughout the marketing and outreach process to ensure full compliance with all applicable requirements.

Reasonable Accommodation and Right to Appeal

All applicants will be given notice in the project specific application package of their right to reasonable accommodation as well as their right to appeal screening decisions. All background information obtained from credit reports, criminal history checks and/or landlord or other personal references will be considered in the light of the project's commitment to provide housing for people in transition who have 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 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.

All notices of denial will include information on the right to appeal and reminder notice of the right to reasonable accommodation for disability.

Rental Application and Wait List Procedure

At initial lease-up and thereafter, AWSS will refer eligible FSP clients to the Horizons at Yucaipa to apply for MHSA housing. All prospective tenants will be required to fill out and submit a rental application at lease-up. Subsequent to initial lease-up, all prospective tenants will fill out and submit a guest card. The guest card serves as the mechanism for property management staff to assess whether an interested person meets program requirements prior to requesting a full rental application, therefore reducing the application burden on both the prospective tenant and the property management staff. The guest card will collect information about the applicant, including, name and contact information, household composition and income. Applications and guest cards can be obtained by calling the leasing office. Due to building restriction and guidelines, certain questions may be asked of perspective tenants such as full-time student status, Registered Sex Offense (RSO), and homeless/disabled status for the MHSA Housing Program units. Hyder Property Management will provide training for the AWSS case managers on the pre-qualification and application process.

Following initial lease-up, those applicants who pre-qualify will be mailed a full rental application which the applicant will be required to complete and return to the leasing office. Once the applicant submits the completed full rental application, he or she will be placed on the wait list in accordance with the time date stamp on the application. Upon request Hyder Property Management will provide the wait list status for prospective tenants to AWSS and DBH. Reasonable accommodation, such as alternative means of receiving or submitting applications, will be made for persons with disabilities. Hyder Property Management and AWSS will work collectively to

determine the types of accommodations that may be helpful to ensure MHSA-eligible applicants are able to access the MHSA designated units.

Applicant Interview and Screening

When there is a vacant MHSA Housing Program unit, the property manager will contact the next eligible applicant on the wait list to schedule an interview time. For the interview, the applicant must be prepared to provide: a state issued identification card, a social security card or number, and income verification (SSI award letter, pay stubs, etc.). If all required documentation is in order, the below interview and screening process takes place once a unit becomes available.

- a. Applicants will be asked to sign forms that will be sent out to verify the information on their application including: income, homeless and disability status. Property Management must obtain verification of this application information prior to any offer of a unit.
- b. Criminal/Credit Background Check
 1. Criminal Background Check. The criminal background check will show history of criminal convictions. Criminal history will be evaluated based on severity, timeframe, and pattern of offenses.
 2. Credit Check. Credit report information may not disqualify an applicant for tenancy. The purpose of obtaining a credit report is to establish current level of debt. Only severe current level of debt that would prevent a tenant from making rent payments would disqualify an applicant for tenancy.
- c. Other Tenant Screening Criteria
 1. Staff will perform case note documentation of applicant for tenant behavior and appropriateness
 2. Tenant behaviors that may effect selection for tenancy include an applicant's illegal use (or pattern of illegal use) of a controlled substance that may interfere with the health, safety, or right to peaceful enjoyment of the premises
- d. An interview with the potential tenant is conducted.
- e. A move-in date is scheduled.

Tenant Eligibility Criteria

In order to be eligible for tenancy in one of the ten (10) MHSA set-aside units at Horizons at Yucaipa, prospective MHSA tenants must meet the following eligibility criteria:

- Must be an older adult (age 60 and above) with diagnosis of serious mental illness (SMI)
- Must be homeless or at risk of homelessness; AND
- Must meet the low-income requirements of the California Tax Credit Allocation Committee and the MHSA Housing Program. Note that the tenant portion of the rent will be 30% of the current Supplemental Security Income (SSI), or 30% of income, whichever is higher, up to a maximum of 30% AMI.

Definitions

Serious Mental Illness:

Applicant is an adult 18 years or older with a verifiable serious and persistent mental illness as defined in the Welfare and Institutions Code Section 5600.3(b).

Homeless:

“Homeless” means living on the streets, or lacking a fixed, regular, and adequate night-time residence. This includes shelters, motels and living situations in which the individual has no tenant rights. (Source: MHSA Housing Program Term Sheet.)

At Risk of Homelessness:

At risk of becoming homeless due to one of the following situations:

- (i) Transitional age youth exiting the child welfare or juvenile justice systems
- (ii) Individuals discharged from institutional settings including:
 - Hospitals, including acute psychiatric hospitals, psychiatric health facilities (PHF), skilled nursing facilities (SNF), with a certified special treatment program for the mentally disordered (STP), and mental health rehabilitation centers (MHRC)
 - Crisis and transitional residential settings
- (iii) Release from local city or county jails
- (iv) Temporarily placed in a residential care facility upon discharge from (ii) or (iii) above.
- (v) Certification by the county mental health director as an individual who has been assessed by and is receiving services from the county mental health department and who has been deemed to be at imminent risk of being homeless.

(Source: MHSA Housing Program Term Sheet.)

Verification of Compliance with Tenant Eligibility Criteria

Hyder Property Management will require third-party documentation of applicant’s compliance with eligibility criteria prior to approving for tenancy.

- Verification of MHSA Housing Program Eligibility will be provided by the Full Service Partnership Provider.
- Verification of income is documented via completion of the Tenant Income Certification Questionnaire, Tenant Income Certification, Employment Verification Forms, and all other required tax credit forms in accordance with the regulations of the California Tax Credit Allocation Committee.

Appeals Process

If a rental application is denied, Hyder Property Management will send the applicant a letter of denial, which will specify the reason for the denial. The applicant has fourteen (14) calendar days after the date of the denial letter to submit a written appeal to Hyder Property Management.

Hyder Property Management will consider any mitigating circumstances that the applicant feels would have an effect on their application and that would overcome or outweigh information already gathered in the tenant screening process. The written

appeal must consist of documentation refuting the stated reason for rejection of the rental application or supporting the mitigating circumstances to be considered in the appeal. If a letter of denial is sent to an applicant, and no response or new evidence is received within fourteen (14) calendar days, Hyder Property Management will close the file permanently.

Hyder Property Management will notify the applicant of the final decision on the appeal within fourteen (14) calendar days of receiving the applicant's written notice of appeal, unless further information or research is required to give full consideration to the appeal.

For additional details refer to the County of San Bernardino Mental Health Services' "Tenant Referral and Certification Process" (attached at the end of this document).

Section D4: Supportive Services Plan

The *Age Wise Supportive Services (AWSS)* program is a Full Service Partnership operated by the County of San Bernardino Department of Behavioral Health to address the identified service needs of Older Adults with serious mental illness. It is the primary objective of the *Age Wise Supportive Services* program to support the individual in maintaining tenancy. The overarching principles of the MHPA housing service plan are client/tenant choice and voluntary services. 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, age 60 and above 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 death of 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.

Service Provider Staffing

AWSS has a multi-disciplinary staff that will provide an array of services both on and off-site, depending on the needs and preferences of the Tenant. Because the tenants are

expected to have a range of goals, AWSS's service plan calls for flexibility in staffing to maximize how and when services are provided. It is AWSS's intention to have at least one full time staff member on site at the development at all times, and AWSS may provide additional staff on an as-needed basis to fulfill the goals of the program. Due to the unique needs of the Older Adult population AWSS will utilize a staffing model that responds to the needs of the population by including an array of staff and a multi-disciplinary approach. The Age Wise team will utilize peer and family advocates and staff reflecting the ethnic and cultural make-up of the resident consumers. Overall, AWSS expects to deliver quality services to the tenants by providing a high staff ratio (1:10) which will allow clinical and support staff the opportunity to provide significant interaction with the 10 older adult tenants. Additionally, to better serve the tenants, AWSS will have the ability to work with tenants in group settings at the development clubhouse in the area set aside for tenants. Tenants will also be able to be seen privately at the office space set aside for AWSS clinicians at the Horizons at Yucaipa project, or in the tenant's individual residence.

Overview and Description of Services

The AWSS program will provide comprehensive yet flexible access to services based on tenant needs twenty-four hours a day and seven-days a week. Services will include clinical based services, housing assistance, access to medication support, co-occurring disorder treatment services, educational and life-skills support, linkage to benefits and entitlements and peer and family support. The services and goals will be developed in partnership with the older adult tenant 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. AWSS will provide targeted services that directly address the unique needs of each tenant. This will include bi-lingual services which 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 tenants' needs. Assertive engagement focusing on strengthening skills for successful tenancy 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 a 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
- Assistance in accessing educational and volunteer experiences
- Money management and financial education
- Employment services and opportunities
- Family and other support system interventions

AWSS will provide all direct mental health maintenance and case management services. All psychiatric services and medications will be provided by the Adult Residential Clinic. The 10 older adult tenants 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 tenants 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 tenants 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 Horizons at Yucaipa Apartments although other county facilities and programs may be used as dictated by program needs.

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, including assistance in accessing educational and volunteer experiences so as to empower each individual to attain their highest level of self sufficiency. The program assists tenants in developing and refining community living skills through individual as well as peer support. Tenants will be assessed, referred and supported in the development of independent life skills such as apartment maintenance, money management, cooking and shopping. Tenants will also be assessed, referred and supported in accessing employment resources in the community and supported in obtaining their career goals as dictated by client ability and need.

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 tenants 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 and ability, employment opportunities and supports will be made available, including assistance to access 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 accessible 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.

Community Services

The Horizons at Yucaipa project will consist of 10 designated MHSA units out of a total of 77 planned units. It is anticipated that the units will be integrated throughout the project. The project is located about one block south of Yucaipa Boulevard which is a major commercial corridor. Nearby amenities include restaurants, a medical clinic, shopping, a market, and a pharmacy. Transportation is easily accessible through Yucaipa's bus system, Omnitrans, which includes a dial-a-ride option for handicapped and elderly passengers. Additionally, the Braswell Family Senior Center is located about a block from the development and the Yucaipa Scherer Senior Center is less than a mile away. The Yucaipa Scherer Senior Center offers socialization, education, and social/recreational activities for Yucaipa Valley seniors, along with meals on wheels and other nutritional programs. The Horizons at Yucaipa Apartments will also offer a range of amenities including a clubhouse with community activity space, pool and spa, media room, laundry, elevators, computer lab, and kitchen. Other on-site amenities include dedicated office space where clients can meet privately with support staff and meeting space that will be specifically for MHSA clients and their supportive-service activities. The location and amenities associated with the project are expected to provide opportunities to promote social and interpersonal interaction as well as support the activities and services that lead to wellness.

Communication

The AWSS Program Manager/designee is expected to be the primary point of contact between AWSS and Hyder & Company Property Management. 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.

Section D5: Supportive Services Plan Chart

Supportive Service	Target Population	Service Provider(s)	Service Location
Comprehensive Assessment	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Psychiatric Evaluation and Medication Support	Older Adult	Adult Residential Services Clinic	On-site or Off-site (transportation assistance)
Development of Coordinated Care Plan	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Ongoing Case Management	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance))
Mental Health Services	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Individual and Group Psychosocial Rehabilitation	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Social Skills Development	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Life Skills Development	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Dual Diagnosis Group	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
New tenant orientation/move-in assistance/tenant rights education	Older Adult	DBH Housing Program	On-site or Off-site (transportation assistance)
Tenants council	Older Adult	DBH Housing Program	On-site or Off-site (transportation assistance)
Psychiatric services	Older Adult	Adult Residential Services Clinic	On-site or Off-site (transportation assistance)
24/7 Crisis intervention	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Information and referrals to other services and programs	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Peer mentoring/support	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)

Supportive Service	Target Population	Service Provider(s)	Service Location
Transportation (Assistance to access only)	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Recreational/socialization opportunities	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Independent living/life skills: budgeting, money management, meal preparation, housekeeping, self-care	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Benefits assistance	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Relapse prevention planning	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)
Community engagement and linkages	Older Adult	Age Wise Program	On-site or Off-site (transportation assistance)

San Bernardino County MHSA Housing Program Tenant Referral and Certification Process Executive Summary

The Mental Health Services Act (MHSA) Housing Program provides significant opportunities to provide permanent supportive housing to unserved and underserved persons with serious mental illness. San Bernardino County engaged in an extensive feedback and review process in the development of a *Tenant Referral and Certification Process* for the MHSA Housing Program in order to ensure a fair and understandable process to connect MHSA eligible consumers with housing. The *MHSA Tenant Referral and Certification Process* outlines the eligibility factors for housing units funded under the MHSA Housing Program, along with the steps that need to be taken in order to become an eligible tenant for MHSA Housing Program funded units.

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 MHSA 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*.

San Bernardino County MHSa Housing Program Tenant Referral and Certification Process

Application Process:

San Bernardino County Department of Behavioral Health (SBDBH) MHSa 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 MHSa housing by the FSP. Potentially eligible consumers may be directed to the FSP through a variety of sources such as the Adult – Psychiatric Triage Diversion Team at County Hospital, outreach and case management teams, county 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 MHSa Housing once they have been certified as MHSa eligible. Property management screening for housing will be conducted by the housing provider, and will be separate from eligibility determination for MHSa services.

The criteria for eligibility under the MHSa housing program are (1) being homeless or at risk of homelessness and (2) meeting San Bernardino County's adult, older adult or TAY target population criteria for serious mental illness and/or the target population criteria for serious emotional disturbance for children and their families. Applicants will be screened by the SBDBH MHSa 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 potential applicants who contact housing developments directly will be informed by the property management or program staff at the development to contact the SBDBH MHSA Program for certification of eligibility.

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 and informed of the reasoning 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. Please refer to the Department of Behavioral Health Standard Practice Manual for full details of denial and appeals processes. Clients may also contact the Patient Rights office for additional assistance.

Full Service Partnership providers will facilitate the application of FSP enrolled/eligible clients for MHSA Housing. FSP staff shall offer assistance to all applicants with completing the property management company's site specific housing application, including any requested translation services, and all related application procedures for a specific project. This shall include assistance with all required documentation (background checks, credit checks, third-party income verification, landlord and other references) as well as the provision of any mitigating information. Staff members may transport and/or accompany the individual to any required interviews. SBDBH staff will also assist and support the applicant, when requested, in any grievance or appeal process. Applicants may use or deny assistance from staff at their discretion.

To ensure confidentiality and protection of health information, prospective tenants will also be asked to submit a completed release of information form, authorizing SBDBH and/or the FSP to provide MHSA Housing Program certification confirmation to the Project Sponsor/Developer or Property Management Company when they are referred to housing developments for application.

MHSA Housing Program Wait List:

MHSA Housing Program applicants (FSP enrolled/eligible applicants seeking housing) will be referred by SBDBH and/or the FSP to housing developments containing eligible units based on housing preferences identified on the Certification Application, including desired housing type and geographic location. If there are no units available at the time of referral and if the housing project maintains a site specific Wait List, the consumer will be placed on the site specific Wait List at the property in numerical order based on the date and time received. The Wait List for MHSA-eligible units will be kept separate from the property's general Wait List. A standard form (note: to be developed) will be used to verify the prospective tenant's eligibility for MHSA Housing. When a unit becomes available, consumers on the Wait List will be notified by the property

manager of the need to complete the tenant screening process established by the project sponsor/developer.

As MHSA Housing Program units become available, the prospective tenants will be notified through the following process:

Notification Letter:

When a new development in the MHSA Housing program is being rented up, or when existing units are expected to become vacant, the housing provider will notify the SBDBH MHSA Housing Program and the FSPs of available units. The housing provider will simultaneously notify applicants on the project-based Wait List and their FSP Teams in writing of the availability of units. The notification will:

1. State the type of housing available.
2. Indicate that the applicant shall have five working days in which to respond to the letter.
3. Ask the applicant if he/she wishes to be screened for the unit by the housing provider.
4. Inform the applicant that if he/she declines the unit he/she will not lose his/her place on the wait list.
5. Inform the applicant that if he/she declines a second time to a further notice, he/she will be informed that he/she will go to the bottom of the wait list.
6. Inform the applicant that if he/she wishes to be screened for tenancy, the mental health service provider for the housing project will assist him/her with the application process, including documentation, transportation, and support during any required property management interviews. The applicant has the right to accept or decline this and other assistance offered by FSP staff.
7. The participating properties will keep their Wait Lists updated by contacting all applicants periodically to reassess their interest in the property. If the prospective tenant is unable to be contacted, they will be removed from the list but may reinstate their active certification status at any time by contacting the SBDBH MHSA Housing Program and providing updated eligibility information.

Fair Housing

This project will comply with all federal, state, and local fair housing and civil rights laws, as well as with all equal opportunity requirements during marketing, rent-up and ongoing operations. Specifically, the project is committed to requirements of Title VI of the Civil Rights Act of 1964, Title VIII and Section 3 of the Civil Rights Act of 1968 (as amended by the Community Development Act of 1974), Executive Order 11063, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, Fair Housing Amendments of 1988, and legislation which may subsequently be enacted protecting the individual rights of residents, applicants, or staff.

The project will not discriminate against prospective residents on the basis of the fact of perception of their race, religion, creed, national origin, age, color, sex, blindness or other physical or mental disability, marital status, domestic partner status, ancestry, actual or perceived sexual orientation, gender identity, AIDS, AIDS-Related Complex, HIV, medical condition, height, weight, political affiliation or other consideration made unlawful by federal, state or local laws.

The project will not discriminate against prospective residents on the basis of their receipt of, or eligibility for, housing assistance under any Federal, State or local housing assistance program or on the basis that prospective residents have minor children. While the Property will not discriminate against those using Section 8 certificates or vouchers or other rental assistance, applicants with such rental assistance must meet all eligibility requirements. The Property will work closely with legal counsel and regulatory agencies throughout the marketing and outreach process to ensure full compliance with all applicable requirements.

Reasonable Accommodation and Right to Appeal

All applicants will be given notice in the project specific application package of their right to reasonable accommodation as well as their right to appeal screening decisions. All background information obtained from credit reports, criminal history checks and/or landlord or other personal references will be considered in the 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 reasonable accommodation. The availability of supportive social services that can assist the applicant in meeting the conditions of tenancy may also be considered in evaluating such information.

All notices of denial will include information on the right to appeal and reminder notice of the right to reasonable accommodation for disability. Applicants will be entitled to receive a copy of the standard Grievance and Appeal Procedure. A copy of any denial notice for MHSA-eligible applicants will also be sent to the SBDBH MHSA Housing Program and the assisting FSP. In such cases, the FSP staff may assist applicants in appealing the denials.

Appendix B

Folsom Oaks Apartments

100 % Supportive Housing for Disabled and Homeless People in Sacramento, California (HUD 811)



Folsom Oaks Apartments

Folsom Oaks Apartments is a new construction 19 unit project in Sacramento County in the City of Folsom. The project is comprised of 3 two-story buildings and 2 one-story buildings; the buildings will in total, contain 8 one-bedroom apartments (593 square feet), 7 two-bedroom apartments (ranging from 752-830 square feet), and 4 three-bedroom apartments (ranging from 1,032 to 1,049 square feet). The project is 100% targeted to households in which at least one adult member has a psychiatric disorder. Five of the 19 units are reserved for MHPA eligible consumers. There is one unit dedicated for a full-time resident manager, in addition to community space.

Owner: Folsom Oaks Apartment Inc. (Subsidiary of TLCS)

Development Consultant: Mercy Housing California

Property Management: Transitional Living and Community Support Inc. (TLCS)

Service Provider: Transitional Living and Community Support Inc. (TLCS)

Tenant Profile: Households with at least one adult with a psychiatric disability and incomes of 30% or below Area Medium Income (AMI).

Service Approach: Diverse range of support services which include a Tenant Council, vocational and employment services.

Key Features and Innovations

- 5 units are reserved for MHPA eligible consumers.
- Transitional Living and Community Support Inc (TLCS) is the lead service provider and will provide case management and various other direct services to tenants on-site. TLCS will work in collaboration with their PACT Program, which provides an array of services to homeless adults with psychiatric disabilities as they transition to permanent housing. The Sacramento County Division of Mental Health will work with a PACT case manager to receive and be linked with services that support housing retention, including money management, entitlements advocacy, counseling, recovery services, and other community support services.
- Amenities of the neighborhood include close proximity to a middle school and public transportation, the Folsom Library/Civic Center, Folsom Lake, and Folsom Zoo.

Financing Information

Capital Financing Sources

HUD Section 811	\$ 2,033,100
HUD Section 811 amendment funds	\$ 1,453,500
MHP Supportive Housing	\$ 2,123,002
City of Folsom	\$ 200,000
MHPA from CalHFA	\$ 500,000
Sponsor – HUD Minimum Capital Investment	\$ 10,000
TOTAL	\$ 6,319,602

(Note: Delay in receiving MHP funds mitigated by loan of \$1,111,002 from Sacramento Housing and Redevelopment Agency)

Operating Financing Sources

HUD Section 811, Shelter Plus Care.

Services Financing Sources

Medi-Cal, Sacramento County Division of Mental Health, HUD (PRAC), Crossroads Employment Services (In-Kind), HUD SHP.

About Transitional Living and Community Support, Inc (TLCS).

TLCS is a private, non-profit psychosocial rehabilitation agency located in Sacramento County that provides housing, living skills training, community support, entitlement advocacy and outreach services for people with psychiatric and other disabilities. TLCS has been actively involved in developing and providing an array of services for their target population since their formation, including housing. As a housing provider, TLCS operates emergency housing, transitional housing programs, supportive housing in SRO's and three permanent housing projects. In addition to being an experienced service provider, TLCS handles property management at their facilities as well. TLCS has developed all of the housing projects they currently manage. TLCS has approximately 100 staff members spread throughout numerous housing and services sites. For more information regarding Transitional Living and Community Support Inc. please see www.tlcsac.org.

About Development Consultant – Mercy Housing California

Mercy Housing California is one of Mercy Housing's largest business centers. With offices in Los Angeles, San Francisco and Sacramento, Mercy Housing California serves more than 10,000 people at 108 properties. Residents range from families to people with special needs to seniors. Many California residents struggle daily with the high cost of living. The average household income is more than \$48,400 – nearly \$5,000 more than the national average. The average annual income of a Mercy Housing California resident is \$19,525.

Mercy Housing California is proud to serve their residents and the communities in California, and they remain committed to changing lives and revitalizing neighborhoods by providing safe, quality, service-enriched housing. For more information regarding Mercy Housing, please see www.mercyhousing.org.

About CSH

The Corporation for Supportive Housing (CSH) is a national non-profit organization and Community Development Financial Institution that helps communities create permanent housing with services to prevent and end homelessness. Founded in 1991, CSH advances its mission by providing advocacy, expertise, leadership, and financial resources to make it easier to create and operate supportive housing. CSH seeks to help create an expanded supply of supportive housing for people, including single adults, families with children, and young adults, who have extremely low-incomes, who have disabling conditions, and/or face other significant challenges that place them at on-going risk of homelessness. For information regarding CSH's current office locations, please see www.csh.org/contactus.



Corporation for Supportive Housing
1330 Broadway, Suite 601
Oakland, CA 94612
T: 510.251.1910
F: 510.251.5954
www.csh.org



Fireside Apartments (Marin County, CA)

Integrated affordable housing development with 18 supportive housing units for households with special needs.



Fireside Apartments

Fireside Apartments consists of 49 affordable studio, one-bedroom and two-bedroom apartments located in Mill Valley, California. Three newly constructed buildings contain 49 apartments leased to low-income households. Eighteen apartments were reserved for special needs populations who are homeless or at risk of homelessness.

Fireside Apartments is an intergenerational community for senior and family households. Thirty-two apartments are studios and one-bedrooms reserved for seniors aged 62 and above located in a three-story, elevator-served building. The remaining 17 units are reserved for family households located in a two-story wood-framed structure of one-bedroom flats and two-story townhouse-style units.

Owner or Sponsor: Eden Housing (transferred from Citizens Housing Corporation)

Developer: Citizens Housing Corporation and Eden Housing

Property Management: Eden Housing Management Inc.

Service Provider: Homeward Bound and Eden Housing

Tenant Profile: Occupancy is restricted to low-income senior and family households earning from 15% to 60% of Area Median Income. Eight senior units and ten family units are leased to special needs households.

Service Approach: Comprehensive on-site resident services are provided via a partnership between Homeward Bound of Marin, a long-time San Rafael-based service provider and the resident services staff of Eden Housing.

Key Features and Innovations

- The project includes the rehabilitation of the historic Fireside Inn, from which it takes its name, into a property manager's office, resident services space and community space, and second-floor apartment for the on-site property manager.
- Due to the intergenerational nature of the residential community, a wide variety of onsite amenities are available. In addition to the community space, the Fireside grounds includes landscaped areas and a children's playground.
- The development includes improvements to the adjacent highway right-of-way to allow for safe, signalized pedestrian access from the property to the Manzanita Park and Ride, Marin County's second busiest transit hub.
- Sustainable features include maintaining the steep wooded bluff rising behind the property as undeveloped open space, solar panels on the roofs of the new buildings, and a design crafted to exceed the State's Title 24 energy efficiency standards by 15%.

Financing Information

Permanent Financing Sources

Low Income Housing Tax Credit Equity (Enterprise)	\$13,994,479
CalHFA Tax-Exempt Bonds	\$ 1,600,000
CalHFA Gap Loan – do you know the source of this loan	\$ 791,004
County of Marin Housing Trust Fund/HOME/CDBG	\$ 3,562,591
County of Marin Relocation Grant	\$ 57,366
FHLB Affordable Housing Program	\$ 1,000,000
Mental Health Services Act	\$ 475,000
State of California Multi-Family Housing Program	\$ 4,882,222
Grants	\$ 885,000
Deferred Interest	\$ 121,830
Deferred Developer Fee	\$ 655,000
Total	\$28,024,492

Operating Financing Sources

Capitalized Operating Subsidy – MHSA Housing Program and Other	\$ 575,000
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Services Financing Sources

McKinney	\$ 79,000
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About Eden Housing

Since its inception in 1968, Eden Housing has been dedicated to building affordable home-ownership and rental communities across Northern California. To-date, they have built over 5,300 residential units in 75 fully affordable projects and have over 1,500 units in its development pipeline. Today, Eden Housing stands out as one of the most productive and successful nonprofit affordable housing developers in California and was recently recognized by Affordable Housing Finance Magazine as one of the Top 50 Affordable Housing Developers in the country.

About Eden Housing Management Incorporated (EHMI)

EHMI was incorporated in 1984. Their commitment to community is their trademark. They believe that the work of EHMI positively influences the lives of their residents. The physical appearance and fiscal stability of their properties enhances the well-being of the neighborhoods and communities in which they are located. Because of their diligence, sound marketing and efficient financial practices, EHMI maintains a portfolio-wide vacancy rate of below 2%. EHMI presently manages a portfolio of 4,335 units in 70 properties in 10 counties throughout the State of California. EHMI's Hayward-based supervisory and supportive staff works closely with the onsite team to ensure that operations are as effective as possible.

About Homeward Bound

Homeward Bound is Marin County's chief provider of shelter and residential services for homeless families and individuals, serving approximately 1,400 people per year in 14 inter-related residential programs. Their overarching goal is to end homelessness in Marin County. To that end, they offer supportive services designed to end homelessness in the life of every person served, whatever their circumstances. Their residents have built an admirable record of success: in 2008-09, 97% of families served and 83% of adults completed their programs [what kind of programs? Service programs? Transitional housing programs?] and moved to stable housing.

About CSH

The Corporation for Supportive Housing (CSH) is a national non-profit organization and Community Development Financial Institution that helps communities create permanent housing with services to prevent and end homelessness. Founded in 1991, CSH advances its mission by providing advocacy, expertise, leadership, and financial resources to make it easier to create and operate supportive housing. CSH seeks to help create an expanded supply of supportive housing for people, including single adults, families with children, and young adults, who have extremely low-incomes, who have disabling conditions, and/or face other significant challenges that place them at on-going risk of homelessness. For information regarding CSH's current office locations, please see www.csh.org/contactus.



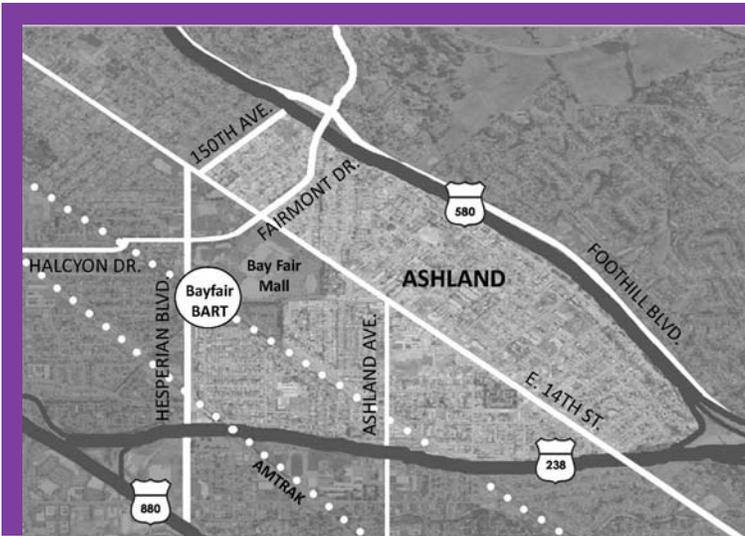
Corporation for Supportive Housing
1330 Broadway, Suite 601
Oakland, CA 94619

Tel: 510.251-1910
Fax: 510.251.5954
email: steven.shum@csh.org
www.csh.org

THE ASHLAND HOUSE

Supported Independent Living Housing Opportunity

Housing Consortium of the East Bay (HCEB) is pleased to announce the upcoming opening of The Ashland House in September 2010. All applicants for this housing must first be certified as eligible by Alameda County Behavioral Health Care Services (BHCS).



The address of the Ashland House will be given to MHSA certified applicants at the Invitation to the Open House.

Features

- Located in Ashland within walking distance of the Bay Fair Mall, Bay Fair BART Station, & AC Transit bus lines.
- Close to major highways, health services, and other amenities.
- Recently rehabilitated home with new exterior, interior paint, kitchen appliances, laundry, and a landscaped backyard.
- Home to be shared by three tenants, each with their own private bedroom and mini-fridge with shared kitchen and bathrooms. Each resident will have lockable storage areas on the property.
- Dedicated and experienced supportive services and property management staff willing to work with **all** residents to maintain long-term housing. Participation in services is not a condition of receiving housing.

Restrictions & Requirements

- **Must be certified as MHSA-eligible by BHCS before applying for Housing with HCEB (see attached information and form to complete)**
- Must be 18 years or older or an emancipated youth
- Minimum monthly income of \$700/month
- Maximum income of \$19,000/year or \$1,583/month for a single individual (30% of area median income)



Managed by Housing Consortium of the East Bay

Creating inclusive communities



5 Easy Steps to Getting Housing at The Ashland House

1

Seek BHCS Eligibility Certification

Request eligibility verification from BHCS. Complete and mail or fax the BHCS certification form to BHCS. If you are eligible for MHSA housing, you will receive an MHSA Certification Letter and HCEB Rental Application in the mail within 10 days.

Questions Regarding BHCS Certification?

Contact 510-777-2112
or email
everyonehome@acbhcs.org



2

Attend Open House if Eligible

All MHSA certified applicants will be invited to attend an Open House and Orientation at the home on July 30th. Applicants are encouraged to attend.

Questions Regarding HCEB Rental Application?

Contact 510-828-8259 or
email jradford@hceb.org



3

Complete Rental Application

All MHSA certified applicants must complete and mail or fax the HCEB Rental Application by August 13th, 2010, and include a copy of your MHSA Certification Letter. Ask for assistance if you need help completing the application. *Only individuals certified as MHSA eligible will receive a copy of the HCEB Rental Application.*



4

Applicant Screening

Applications will be reviewed for eligibility and completeness. A lottery will be used to help select final tenants, if necessary.



5

Applicant Acceptance or Denial

If you are accepted, you will receive an Approval Letter outlining the move in process at The Ashland House.



Alameda County Mental Health Services Act (MHSA) Housing Program Eligibility Certification

Background Information

In November 2004, California voters passed ballot proposition 63, known as the Mental Health Services Act (MHSA). The Act created a new revenue source to expand the funding available for mental health services and supports statewide. Funds are collected by the state and distributed to local mental health departments based on formulas established at the state level. The California Department of Mental Health (DMH) and California Housing Financing Agency (CalHFA) set aside some MHSA funds to create a program known as the MHSA Housing Program. This program uses MHSA funding to help create dedicated affordable, supported housing units for extremely-low income households impacted by serious mental health issues. Each county decides locally how to invest its MHSA Housing Program and other MHSA funds.

Alameda County Behavioral Health Care Services (BHCS) has invested Mental Health Services Act (MHSA) funding in a range of affordable housing projects throughout Alameda County. Housing projects that have received MHSA funding have a certain number of dedicated housing units set aside within each property for households that meet MHSA Housing Program eligibility criteria.

Each housing project with designated MHSA units is unique and has its own tenant selection and screening process. BHCS does not maintain a central waiting list for MHSA units. Each housing project maintains its own waiting list or takes applications on a first-come, first-served basis. In order to qualify for a MHSA unit at one of these housing projects, a household must obtain a certification from the BHCS Housing Services Office documenting their eligibility for an MHSA unit. In addition, applicants must meet the other criteria established for each specific housing project. The BHCS Housing Services Office and property owners and managers jointly market MHSA Housing opportunities as they arise. Individuals interested in receiving e-mail notifications about MHSA and other housing opportunities should subscribe to the BHCS Housing Services Office news alerts at: <http://www.acbhcs.org/Housing/newsletter.htm>

MHSA Housing Eligibility Certification

The BHCS Housing Services Office is responsible for certifying eligibility for MHSA Housing units. In order to be considered for an MHSA Housing unit, a household must:

- 1) Be enrolled in an MHSA-funded Full Service Partnership (FSP) program and receiving ongoing housing assistance from the program OR
- 2) Have at least one member of the household with a documented serious mental disorder or serious emotional disturbance as defined in California law AND be homeless or at-risk of homelessness as defined by Housing and Urban Development (HUD) HEARTH Act regulations.

Definitions of serious mental disorder, serious emotional disturbance, homeless, and at-risk of homelessness are contained in subsequent pages of this packet. These definitions may change over time as a result of state and/or federal legislative or policy changes. The certification application identifies how to document eligibility in the above categories.

Certification decisions are made based on receipt of appropriate documentation that verifies that the household meets the eligibility criteria. Once certification applications are received, the Housing Services



Alameda County Mental Health Services Act (MHSA) Housing Program Eligibility Certification

Office will process them within ten (10) working days. Households certified as eligible will receive a written notification of eligibility that will be valid for a period of 90 days. After 90 days, households will need to request a re-certification because their eligibility for certification may change during this time period. Households that are not deemed eligible will receive written notification of this decision with a description of the reasons for denial of eligibility.

Applicants for MHSA Housing units must provide a certification letter from BHCS to the property Owner or its Agent, in order to qualify for these designated units. BHCS can also provide a letter directly to a specific Owner or Agent with permission from the applicant.

Contact Information

Certification applications and questions about the process should be directed to:

Alameda County Behavioral Health Care Services (BHCS)
Housing Services Office (HSO)
2000 Embarcadero Cove, STE 400
Oakland, CA 94606
Phone: (510) 777-2112
Fax: (510) 567-8147
E-mail: everyonehome@acbhcs.org

Serious Emotional Disorder Definition

Welfare and Institutions Code 5600.3 (a)(1)

For the purposes of this part, "seriously emotionally disturbed children or adolescents" means minors under the age of 18 years who have a mental disorder as identified in the most recent edition of the Diagnostic and Statistical Manual of Mental Disorders, other than a primary substance use disorder or developmental disorder, which results in behavior inappropriate to the child's age according to expected developmental norms.

Members of this target population shall meet one or more of the following criteria:

- (A) As a result of the mental disorder the child has substantial impairment in at least two of the following areas: self-care, school functioning, family relationships, or ability to function in the community; and either of the following occur:
 - (i) The child is at risk of removal from home or has already been removed from the home.
 - (ii) The mental disorder and impairments have been present for more than six months or are likely to continue for more than one year without treatment.
- (B) The child displays one of the following: psychotic features, risk of suicide or risk of violence due to a mental disorder.
- (C) The child meets special education eligibility requirements under Chapter 26.5 (commencing with Section 7570) of Division 7 of Title 1 of the Government Code.



Alameda County Mental Health Services Act (MHSA) Housing Program Eligibility Certification

Serious Mental Disorder Definition

Welfare and Institutions Code Section 5600.3 (b) (1)

For the purposes of this part "serious mental disorder" means a mental disorder which is severe in degree and persistent in duration, which may cause behavioral functioning which interferes substantially with the primary activities of daily living, and which may result in an inability to maintain stable adjustment and independent functioning without treatment, support, and rehabilitation for a long or indefinite period of time. Serious mental disorders include, but are not limited to, schizophrenia, as well as major affective disorders or other severely disabling mental disorders. This section shall not be construed to exclude persons with a serious mental disorder and a diagnosis of substance abuse, developmental disability, or other physical or mental disorder.

Members of this target population shall meet all of the following criteria:

- (A) The person has a mental disorder as identified in the most recent edition of the diagnostic and Statistical Manual of Mental Disorders, other than a substance use disorder or developmental disorder or acquired traumatic brain injury pursuant to subdivision (a) of Section 4354 unless that person also has a serious mental disorder as defined in paragraph (2).
- (B)
 - (i) As a result of the mental disorder the person has substantial functional impairments or symptoms, or a psychiatric history demonstrating that without treatment there is an imminent risk of decompensation to having substantial impairments or symptoms.
 - (ii) For the purposes of this part, "functional impairment" means being substantially impaired as the result of a mental disorder in independent living, social relationships, vocational skills, or physical condition.
- (C) As a result of a mental functional impairment and circumstances the person is likely to become so disabled as to require public assistance, services, or entitlements.

For the purpose of organizing outreach and treatment options, to the extent resources are available, this target population includes, but is not limited to, persons who are any of the following:

- (A) Homeless persons who are mentally ill.
- (B) Persons evaluated by appropriately licensed persons as requiring care in acute treatment facilities including state hospitals, acute inpatient facilities, institutes for mental disease, and crisis residential programs.
- (C) Persons arrested or convicted of crimes.
- (D) Persons who require acute treatment as a result of a first episode of mental illness with psychotic features.

California veterans in need of mental health services who are not eligible for care by the United States Department of Veterans Affairs or other federal health care provider and who meet the existing eligibility requirements of this section shall be provided services to the extent resources are available. Counties shall refer a veteran to the county veterans' service officer, if any, to determine the veteran's eligibility for, and the availability of, mental health services provided by the United States Department of Veterans Affairs or other federal health care provider.



Alameda County Mental Health Services Act (MHSA) Housing Program Eligibility Certification

Homeless or At-Risk of Homelessness Definition

A person or household is considered homeless or at-risk of homelessness if they are currently in one of the following living or residential situations:

- ❖ An individual or family with a primary nighttime residence that is a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings, including a car, park, abandoned building, bus or train station, airport, or camping ground.
- ❖ An individual or family living in a supervised publicly or privately operated shelter designated to provide temporary living arrangements (including hotels and motels paid for by Federal, State, or local government programs for low-income individuals or by charitable organizations, congregate shelters, and transitional housing).
- ❖ An individual who is exiting an institution where he or she resided for 90 days or less and who resided in a shelter or place not meant for human habitation immediately before entering that institution.
- ❖ An individual or family who will imminently lose their primary nighttime residence provided that: (a) the primary nighttime residence will be lost within 14 days of the application for homeless assistance; AND (b) no subsequent residence has been identified; AND (c) the individual or family lacks the resources or support networks needed to obtain other permanent housing.
- ❖ Unaccompanied youth and homeless families with children and youth defined as homeless under other Federal statutes who do not otherwise qualify as homeless under this definition and: a) have not had a lease, ownership interest, or occupancy agreement in permanent housing at any time during the 91 days immediately preceding the application for homeless assistance; b) have experienced persistent instability as measured by three moves or more during the 90-day period immediately before applying for homeless assistance; and c) can be expected to continue in such status for an extended period of time because of chronic disabilities, chronic physical health or mental health conditions, substance addiction, histories of domestic violence or childhood abuse, the presence of a child or youth with a disability, or two or more barriers to employment, which include the lack of a high school degree or General Education Development (GED), low English proficiency, a history of incarceration, and a history of unstable employment.
- ❖ Any individual or family who is fleeing, or is attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual or family member that has either taken place within the individual's or family's primary nighttime residence or has made the individual or family afraid to return to their primary nighttime residence AND has no other residence AND lacks the resources or support networks to obtain other permanent housing.
- ❖ An individual or family enrolled in an Alameda County Full Service Partnership (FSP) Program where the household is receiving ongoing housing assistance from the Program.



**Alameda County Mental Health Services Act (MHSA) Housing Program
Eligibility Certification FORM**

Instructions: Please complete this two-page form for eligibility certification and provide the appropriate supporting documentation to verify that the applicant meets the eligibility criteria of **serious mental illness or serious emotional disturbance AND homelessness/at-risk of homelessness**.

BHCS will only certify applicants that provide evidence that they meet ALL eligibility criteria for MHSA Housing. Forms and supporting documents should be mailed or faxed to Alameda County Behavioral Health Care Services-Housing Services Office, 2000 Embarcadero Cove, STE 400, Oakland, CA 94606. Fax: (510) 567-8147. Please contact staff at (510) 777-2112 or everyonehome@acbhcs.org with questions. Note: Please make sure your faxes are secure before sending!!

Print Name of Applicant (qualifying individual): _____

Date Application Completed: _____ Applicant Date of Birth: _____

Applicant Social Security # (for search of BHCS records ONLY): _____

Name of Head of Household/Guardian (only if applicant is a child): _____

Applicant's Current Contact Address (if applicable): _____

Applicant's Current Contact Phone Number (if applicable): _____

Applicant's Current E-mail Address (if applicable): _____

Verification of Serious Mental Illness or Serious Emotional Disturbance or Full Service Partnership (FSP)

Enrollment: The applicant may provide records that document their eligibility OR they may authorize BHCS to contact a specific provider for verification. Documentation must include information that clearly states the applicant meets the definition of serious mental illness (as defined in California Welfare and Institutions Code Section 5600.3 (b)(1)) or serious emotional disturbance (as defined in California Welfare and Institutions Code Section 5600.3 (a)(1)). Copies of these codes are included in this application packet. The applicant may authorize BHCS to contact a specific provider or search BHCS records for verification of serious mental illness or serious emotional disturbance by completing the section below. *NOTE: The BHCS ACCESS unit at 1-800-491-9099 provides behavioral health service referral information.*

CONSENT TO RELEASE OR OBTAIN INFORMATION – ELIGIBILITY ONLY

I understand that to be certified for referral to an MHSA Housing Unit I must verify that I or my minor child has a serious mental illness or serious emotional disturbance as defined by California law. I hereby give my permission to BHCS Housing Services Office staff to contact the following providers or facilities to verify my eligibility. I give these providers my permission to disclose information to BHCS in order to verify my eligibility. Please provide specific provider names and contact information: _____

Print Name of Applicant: _____

Print Name of Parental Guardian (if applicant is a minor): _____

Authorized Signature of Applicant/Guardian: _____

Date Signed: _____



Alameda County Mental Health Services Act (MHSA) Housing Program Eligibility Certification FORM

Homelessness/At-Risk Verification: Where did you primarily sleep and stay over the last week? (Check the **ONE** box that applies to you AND attach the required documentation for the box you checked). NOTE: If you stayed in a situation other than one described below you are NOT eligible for an MHSA Housing unit at this time.

Check ONE	Housing situation over last week?	Type of documentation required
	Place not meant for human habitation (e.g., a vehicle, an abandoned building, bus-train/subway station/airport or anywhere outside)	Written, signed, and dated statement obtained from a third party regarding the applicant's whereabouts. If unable to obtain this verification, the applicant may prepare a short written statement about their previous living place and have the applicant sign and date the statement.
	Emergency shelter	Written, signed, and dated referral/verification from the shelter.
	Transitional housing for homeless persons/ Transitional Residential Treatment Program	Written, signed, and dated statement from the program staff indicating that the individual has been a resident there AND the referring agency's written, signed, and dated verification as to the individual's homeless status when he/she entered their program.
	Institution or treatment facility (<u>for less than 90 days, on the streets or in a shelter prior to that</u>)	Written, signed, and dated verification from the facility's staff that the applicant has been residing in the institution for less than 90 days; and information on the applicant's living situation prior to entrance into the facility.
	Imminently at-risk of losing primary nighttime residence.	Written, signed, and dated verification of current housing situation, lack of subsequent residence, and lack of resources to obtain permanent housing from a third-party. Self-verification with appropriate supporting documentation is also acceptable. Documentation must show: <i>Housing will be lost within 14 days of the application AND no subsequent residence has been identified; AND the individual or family lacks the resources or support networks needed to obtain other permanent housing.</i>
	Unaccompanied youth and homeless families with children and youth with 90+ days of unstable housing	Written, signed, and dated verification of current housing situation, lack of subsequent residence, and lack of resources to obtain permanent housing from a third-party. Self-verification with appropriate supporting documentation is also acceptable. Documentation must show: <i>Household has not had a lease, ownership interest, or occupancy agreement in any permanent housing at any time during the 91 days immediately preceding the application AND have experienced persistent instability as measured by three moves or more during the 90-day period immediately before the application AND can be expected to continue in such status for an extended period of time because of one or more barriers.</i>
	Persons fleeing domestic violence	Written, signed, and dated verification from the participant or a third party that describes the current situation and that the applicant has no other residence and lacks the resources or support networks to obtain other permanent housing.
	Enrolled in a Full Service Partnership (FSP) program and receiving housing assistance through this program	Written, signed, and dated verification from the FSP provider agency AND/OR permission to review BHCS records to verify FSP enrollment.

Vida Nueva

100% Permanent Supportive Housing for formerly homeless families and individuals with disabilities in Sonoma County, California.



Vida Nueva

Vida Nueva is a 24-unit permanent supportive housing complex for single-parent families and single adults living with mental illness and/or other disabilities.

Owner or Sponsor: Burbank Housing Development Corporation and Community Housing Sonoma County

Developer: Burbank Housing Development Corporation and Community Housing Sonoma County

Property Management: Burbank Housing Management Corporation

Service Provider: Committee on the Shelterless (COTS) and Sonoma County Mental Health

Tenant Profile: Formerly homeless families and individuals living with disabilities, including mental illness, chronic substance abuse.

Service Approach: Comprehensive on-site supportive services will be provided in the 2,300-square foot "Common House" that anchors the development. The Family Connection Program, utilizing volunteer mentoring teams, will provide additional support to families.

Key Features and Innovations

- The project was designed with children in mind. The development is fully fenced, and parents have sight-lines from all common spaces.
- Vida Nueva was designed using Green Building principles and technology, reducing energy costs for residents.
- COTS offers their Family Connection Program at Vida Nueva, where volunteer mentor teams provide a support network for each family.
- Six units at Vida Nueva are designated for Mental Health Services Act – eligible tenants, who will receive services from Sonoma County Mental Health.
- Vida Nueva was completed in December, 2008 and was fully leased immediately.

Financing Information

Capital Financing Sources

HCD Multifamily Housing Program – Supportive Housing	\$2,053,013
Mental Health Services Act	\$ 600,000
City of Rohnert Park (redevelopment)	\$1,675,000
Sonoma County Community Development Commission (HOME)	\$ 557,992
FHLBSF Affordable Housing Program	\$ 161,000
Tax credit equity (inc. deferred developer fee)	<u>\$4,012,625</u>
Total	\$9,059,630

Operating Financing Sources

MHSA Capitalized Operating Subsidy	\$ 400,000
------------------------------------	------------

Services Financing Sources

Sonoma County Mental Health Division, Mental Health Services Act, Foundation grants

About Burbank Housing

Burbank Housing is a local nonprofit organization dedicated to increasing the supply of housing in Sonoma County, so that low-income people of all ages, backgrounds, and special needs will have a better opportunity to live in decent and affordable housing. Organized in 1980, Burbank provides qualified nonprofit housing development, ownership, and management services in Sonoma County. Burbank Housing builds and manages family and senior rental housing and creates homeownership opportunities, largely through its mutual self-help program. Burbank Housing collaborates with service organizations to provide supportive housing for people with special needs, including people who are elderly, physically or mentally disabled, farm workers, or homeless.

About Community Housing Sonoma County

Community Housing Sonoma County is focused on innovative approaches to creating permanent supportive housing, and committed to building the capacity of service providers to own and operate such housing. Since 2003, Community Housing Sonoma County has helped create 179 housing units for very low income families and individuals, with 71 of those set aside as permanent supportive housing for persons living with disabilities.

About Committee on the Shelterless (COTS)

COTS was founded in 1988 in response to the growth of homeless families with children in Sonoma County. The agency provides emergency shelter that includes childcare, emergency food supplies, transitional housing and now – with the building of Vida Nueva – permanent supportive housing. COTS offers a wide array of supportive services, including case management, mental health and substance abuse assessment/treatment, help with employment and/or benefits advocacy, financial literacy training, and residential parenting education. COTS makes extensive use of trained community volunteers to mentor families who are moving out of homelessness.

About CSH

The Corporation for Supportive Housing (CSH) is a national non-profit organization and Community Development Financial Institution that helps communities create permanent housing with services to prevent and end homelessness. Founded in 1991, CSH advances its mission by providing advocacy, expertise, leadership, and financial resources to make it easier to create and operate supportive housing. CSH seeks to help create an expanded supply of supportive housing for people, including single adults, families with children, and young adults, who have extremely low-incomes, who have disabling conditions, and/or face other significant challenges that place them at on-going risk of homelessness. For information regarding CSH's current office locations, please see www.csh.org/contactus.



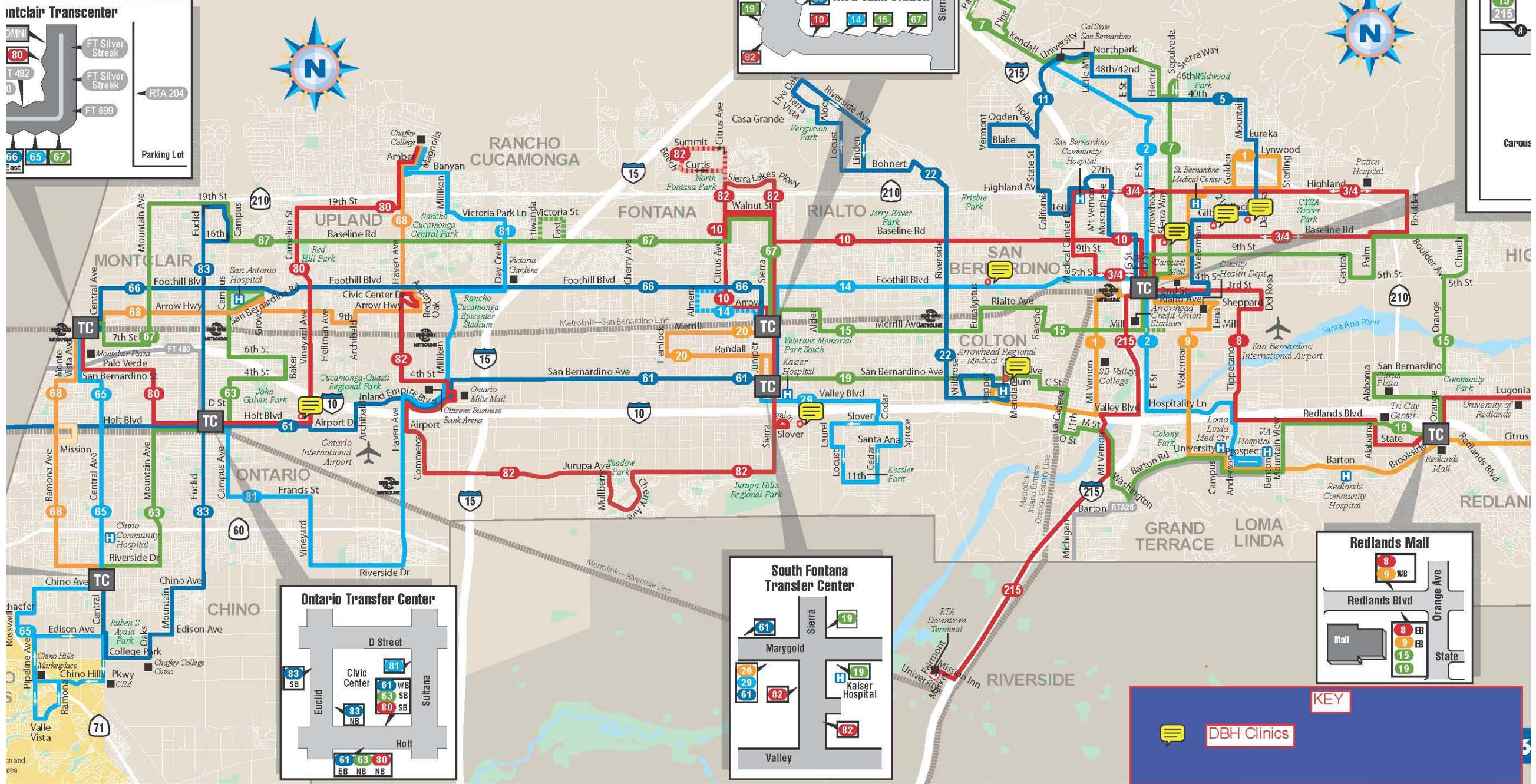
Corporation for Supportive Housing
328 Maple Street, Fourth Floor
San Diego, CA 92103
T: 619.232.1982
F: 619.232.3125
E: sdca@csh.org
www.csh.org

Sample Map of Clinics & Transportation in San Bernardino Vicinity

Montclair Transcenter

RTA 204
Parking Lot

Fontana Metrolink Station



Ontario Transfer Center

South Fontana Transfer Center

Redlands Mall

KEY

DBH Clinics

Appendix D

Administration

268 W. Hospitality Lane, Suite 400 • San Bernardino, CA 92415 • (909) 382-3133 • Fax (909) 382-3105



ALLAN RAWLAND, MSW, ACSW
Director

March 25, 2010

Dear Interested Parties:

Introduction

We are pleased to release the following Guidelines for Applications for parties interested in applying for funding through the Mental Health Services Act (MHSA) Housing Program. The MHSA Housing Program provides funding for the development of permanent supportive housing for individuals with serious mental illness who are homeless or at risk of homelessness. The purpose of the Guidelines for Applications is to establish an administrative process for pre-screening applicants, evaluating project proposals, and matching applicants with an appropriate Full Service Partnership, prior to the preparation of an MHSA funding application.

Background

The California Department of Mental Health (State DMH) and the California Housing Finance Agency (CalHFA) have allocated approximately \$20 million to the County of San Bernardino Department of Behavioral Health (SBDBH). These funds may be utilized for capital and operating subsidies for the development, acquisition, construction and/or rehabilitation of permanent supportive housing. SBDBH is designated as the local public agency responsible for submitting MHSA funding applications. The full state application is available for reference at the CalHFA website: www.calhfa.ca.gov/multifamily/mhsa/index.htm.

Planning

SBDBH has led a community planning effort to determine the goals and priorities for the use of MHSA funds in San Bernardino County. The result of this planning effort is the San Bernardino County MHSA Housing Plan, which calls for the creation of 150 new units of dedicated permanent supportive housing. The MHSA Housing Plan contains development guidelines that applicants must consider when planning projects that may utilize MHSA funds. The MHSA Housing Plan and these Guidelines for Applications can be found at www.co.san-bernardino.ca.us/dbh/mhsa/mhsa.asp.

Requirements

In order to submit an application for MHSA funding, applicants are required to attend at least one mandatory public workshop. Those in attendance at previous San Bernardino MHSA developer workshops are not required to attend again. Future workshops will be scheduled and held throughout the County as needed.

The next **mandatory developer workshop** will be held on **Tuesday, April 20, 2010 at 9:30 a.m.** at Morongo Basin Mental Health Wraparound Building, 58923 Business Center Drive, Suite A, Yucca Valley, CA 92284. Please RSVP for the meeting with Diana Perez at (909)387-8619 or by email at diperez@dbh.scounty.gov.

GREGORY C. DEVEREAUX
County Administrative Officer

Board of Supervisors
BRAD MITZELHEFF, First District
PAUL BLANE, Second District
JOSE GONZALES, VICE CHAIR, Fifth District
NILE DERRY, Third District
GARY C. OVILLI, CHAIR, Fourth District

DBH will continue accepting Pre-Application information packages from qualified applicants until all MHSA funds have been reserved or committed. The Pre-Application information package will allow DBH the opportunity to review the proposed project, assess the applicant's experience and financial capacity, and evaluate readiness to proceed with an application. DBH and its consultant team (Corporation for Supportive Housing and LeSar Development Consultants) will provide each applicant with written feedback on technical issues such as compliance with state requirements, MHSA housing plan goals, and specific project criteria.

We are looking forward to the successful implementation of this program in San Bernardino County to increase the supply of permanent supportive housing for individuals with serious mental illness who are homeless or at risk of homelessness. Please send questions in writing to Douglas Fazekas, Administrative Manager, County of San Bernardino Department of Behavioral Health, 700 E. Gilbert Street, Building 6, San Bernardino, CA 92415-0920 or via email at: dfazekas@dbh.sbcounty.gov.

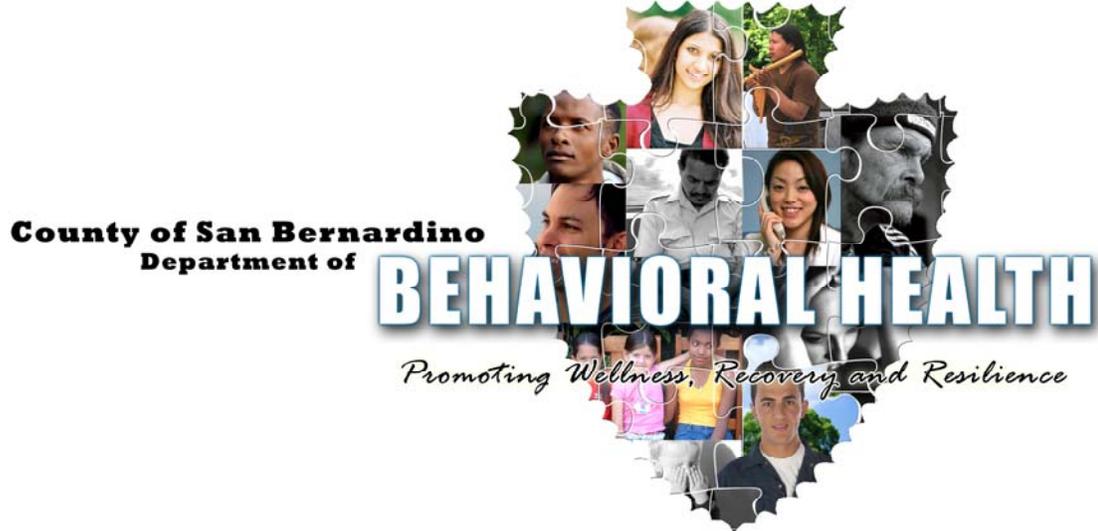
Sincerely,



Allari Rawland, MSW, ACSW
Director

AR:DF:dp

cc: Members of the Board of Supervisors
Gregory C. Devereaux, County Administrative Officer
Linda Haugan, Assistant County Administrator
Trudy Raymundo, Administrative Analyst
Lori Ciabattini, Administrative Analyst
Department of Behavioral Health Executive Staff
Kathy Thomas, Director, County of San Bernardino Redevelopment Agency
Mitch Slagerman, Director, County of San Bernardino Community Development and Housing
Susan Benner, Executive Director, Housing Authority of San Bernardino County
Frank Salazar, Deputy County Counsel
San Bernardino County Mental Health Commission



County of San Bernardino
Department of Behavioral Health

**Mental Health Services Act
Housing Program**

Guidelines for Applications

Funding Availability for Development Financing and Operating
Subsidies to develop Permanent Supportive Housing for Individuals
with Serious Mental Illness Who Are Homeless or At Risk of
Homelessness

Revised: March 25, 2010

**San Bernardino County
Mental Health Services Act
Housing Program**

Guidelines for Applications

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2. San Bernardino County Target Populations
3. San Bernardino County MHSA Housing Development Guidelines
4. Full Service Partnerships Contact Information
5. MHSA Term Sheet and Program Description (CalHFA)
6. Pre-Application Checklist
7. Development Summary Form
8. Legal Status Questionnaire

Overview of the State MHSA Housing Program

The Mental Health Services Act (MHSA) created new funding for mental health services for unserved and underserved persons with serious mental illness. The MHSA Housing Program provides both capital and operating resources to create permanent supportive rental and shared housing opportunities throughout California.

At the state level, the California Department of Mental Health (State DMH) and the California Housing Finance Agency (CalHFA) are working collaboratively to implement the MHSA housing program. The program provides permanent financing for acquisition, construction and/or rehabilitation of permanent supportive housing for individuals with mental illness. Capitalized operating subsidies for rental units serving MHSA tenants are also available for projects approved for MHSA capital funds. A summary of the program requirements and financing terms can be found in Attachment 6, MHSA Housing Program Term Sheet and Program Description.

Under the MHSA Housing Program, approximately \$20 million is available for San Bernardino County, of which \$13 million is for capital development costs and \$7 million is for operating subsidies. To access these funds, the County of San Bernardino Department of Behavioral Health (SBDBH), is designated as the public agency responsible for submitting MHSA funding applications to the two State agencies on behalf of applicants.

The MHSA housing application consists of two main components: the project's financial feasibility and the project's social service plan, which details how services will be delivered to the target population residing in the proposed project. During the application process, CalHFA will review requests for capital and operating funds and evaluate the project's financial feasibility, and State DMH will review the proposed target population and the project's social service plan. Once funds are awarded, CalHFA will oversee all financial aspects of the project and State DMH will oversee the provision of social services.

Types of Eligible Projects

The State MHSA Program has eligibility guidelines for the two types of development projects that it will fund: Shared Housing and Multifamily Rental Housing.

1. **Shared Housing Developments** are projects in which each MHSA-eligible tenant occupies a lockable bedroom. Each tenant holds a separate lease agreement and is responsible for paying rent. Rents must be restricted to 30% of 50% of area median income (AMI), with preference given to projects that target units for tenants that earn less than 30% of AMI. Three types of buildings are eligible for shared housing:
 - a. A single-family home with at least 2 and no more than 5 bedrooms

- b. A residential building containing 2 to 4 units, with all of the units dedicated to shared housing
 - c. Condominiums with a minimum of 2 bedrooms in each unit, with all of the units dedicated to shared housing
2. **Multifamily Rental Housing Developments** are projects of 8 to 100 units, where at least 8 of the units are set aside for MHSA-eligible residents; or, projects of more than 100 units with at least 10 units set-aside for eligible residents. Rents must be restricted to 30% of 50% of AMI, with preference given to projects that target units for tenants that earn less than 30% of AMI.

Rental developments, due to their larger development costs, will require additional financing, which may be obtained from the California Department of Housing and Community Development, the California Tax Credit Allocation Committee, and the U.S. Department of Housing and Urban Development. Applicants are also encouraged to find locally administered housing funds such as project-based Section 8, HOME, and redevelopment housing set-aside funds.

Qualified Applicants

In order to apply for MHSA funding, an applicant must be one of the following entities:

1. A non-profit housing developer with a track record of successful affordable housing development.
2. A joint venture partnership of a successful non-profit housing developer with either an established service provider or a start-up non-profit developer.
3. A non-profit service provider that has a track record of serving the target population and that is interested in pairing up with a non-profit housing developer.
4. A limited partnership, where a non-profit developer with a successful track record is the general managing partner.
5. An affiliate of the local redevelopment or housing agency with a track record of successful affordable housing development.

The following entities are not eligible to apply:

1. A for-profit business.
2. A religious organization that is not set up as a non-profit 501(c)(3) organization.
3. A for-profit real estate developer, unless it is in a limited partnership with a non-profit developer.

San Bernardino County MHSAs Housing Plan

The San Bernardino County MHSAs Housing Plan calls for the creation of 150 new units of dedicated permanent supportive housing for individuals with serious mental illness who are homeless or at significant risk of becoming. The complete MHSAs Housing Plan can be found at: <http://www.co.san-bernardino.ca.us/dbh/mhsa/mhsa.asp>.

Supportive housing is a successful, cost-effective combination of affordable housing with services that helps people live more stable, productive lives. Supportive housing works well for people who face the most complex challenges; individuals and families who are not only homeless or at risk of homelessness, but who also have very low incomes and serious persistent issues such as a mental health disorder. The supportive housing model ensures that appropriate supports and services are available for tenants to ensure their stability in housing.

The MHSAs Housing Plan, approved in November 2008, builds on the County of San Bernardino MHSAs Community Services and Supports (CSS) Plan. The supportive housing units will be dedicated for individuals designated within the CSS plan as currently unserved and who are currently enrolled or eligible to be enrolled in Full Service Partnerships (FSPs). FSPs are comprehensive programs designed to provide “whatever it takes” services to stabilize and support individuals with mental illness who also have significant other social/economic barriers for which they require care.

New units created as an outcome of this plan will be targeted to adults and older adults with serious mental illness and transition-aged youth with severe emotional disorders who are homeless or at risk of homelessness. A portion of units will also be targeted to provide housing to individuals with serious mental illness leaving or being diverted from the criminal justice system. Definitions of the target populations from the MHSAs Housing Plan can be found in Attachment 3, *San Bernardino County Target Populations*.

The MHSAs Housing Plan outlines a targeted number of units, broken down by target population, building type, unit size, and other criteria. The plan includes a broad financial model estimating the overall cost of leasing, developing and/or operating these units. It demonstrates how locally controlled MHSAs housing funds may be used to leverage the additional financing needed to achieve the targets. Finally, the plan includes a proposed process for ensuring that progress is evaluated annually and modifications are implemented as needed to ensure successful outcomes.

The MHSAs Housing Plan also includes guidance for applicants about desirable projects, including certain design and development principals which proposed MHSAs housing projects in San Bernardino County must meet. This guidance also includes requirements for on-site and off-site amenities, income targeting and affordability restrictions. The development guidelines can be found in Attachment 4, *San Bernardino County MHSAs Housing Development Guidelines*.

Overview of Administrative Review Process

In order to submit an application for MHSAs housing funds, applicants are required to attend the mandatory public workshop to learn about the MHSAs housing program, these Guidelines for Applications, the Terms and Conditions for MHSAs funding, and the “over-the-counter” administrative review process. SBDBH, with technical assistance from the Corporation for Supportive Housing and LeSar Development Consultants (“Consultant Team”) will assist each applicant to complete the process. The steps and estimated timeframes in the administrative review process are outlined in Attachment 1, *MHSA Housing Program Application Process Chart*.

The first step in the process for each applicant is to prepare and submit the Pre-Application information package as outlined in the following pages. The Pre-Application will be initially reviewed by SBDBH and a Consultant Team representative and then by a Technical Review Committee (TRC). Written feedback will be provided to the applicant on issues of concern, and any technical issues identified in the Pre-Application must be resolved by the applicant.

After the initial review by the TRC, SBDBH will match the applicant to an appropriate Full Service Partnership (FSP), based on the selected target population and geographic location. The applicant will contact the FSP to discuss the supportive services component and negotiate an agreement to collaborate on the supportive housing project. This agreement will be formalized in a draft Memorandum of Understanding (MOU).

When SBDBH determines that any technical issues have been satisfactorily addressed, the Pre-Application will be presented to the County of San Bernardino Executive Housing Committee (“Executive Committee”) for consideration. When the Executive Committee has approved the Pre-Application and the draft MOU (if available), the applicant and FSP will prepare a full MHSAs funding application.

The MHSAs application will be submitted to SBDBH for determination of completeness, and, then to the SBDBH Executive Director, who will schedule an item on County Board of Supervisors agenda. In advance of the Board of Supervisors meeting, SBDBH will post selected parts of the application on its Website for the required 30-day public comment period. When this process is completed and the Board has approved the supportive services element, the SBDBH Executive Director will sign-off on the application and it will be sent to CalHFA and State DMH. The State agencies require approximately 120 days to review and approve the application for MHSAs funding.

The Pre-Application Information Package

The initial step is to prepare an information package for submittal to SBDBH. One original and six identical copies of the Pre-Application must be submitted, each in a loose leaf notebook with a table of contents and tabs to separate the items. In addition, the original must include two compact discs with all Pre-Application materials on it. Each item below must be included in the Pre-Application and presented in a clearly identifiable tabbed section. Include the Pre-Application Checklist (attached as Exhibit 1) in the first tab.

Pre-Application Overview Materials

1. A brief cover letter, signed by the CEO, Executive Director, or President. The letter should express the applicant's interest in developing permanent supportive housing for one or more of the target populations. Identify the person with the authority to represent and make legally binding commitments on behalf of the applicant.
2. Pre-Application Checklist (as shown in Attachment 6).
3. Development Summary Form (as shown in Attachment 7). (This form is the same form required by CalHFA for the full MHSA application.)
4. A narrative Development Description, limited to two pages in length. The narrative Development Description must include the housing and service goals of the development; characteristics of the tenants to be served; the type of housing that will be provided, including building type, layout, features, and how the building(s) will meet the service needs of the tenants; the primary service provider and other development partners; and a summary of development financing. (This narrative is the same as is required by CalHFA for the full MHSA application.)

Development Team Information

1. Description of the applicant and development team, including the legal entity form of each party (non-profit corporation, for-profit corporation, LP, LLC). Provide full descriptions of existing or intended relationships, etc. Disclose all identities of interest in existence or anticipated to exist. Disclose any potential conflicts of interest with any County of San Bernardino elected official or management employee. To the extent known, all key members of the development team should be listed, including consultants, service providers, attorneys, architect, general contractor, construction management firm, property management firm, etc.
2. Provide full contact information for each key member of the development team. (This contact information may be provided using pages 4 through 7 of the State of California Universal Application.)

3. Organizational resumes for each of the project sponsors/developers, the service provider, and the property management firm. Please include a completed Previous Participation Certificate (as included in the State of California Universal Application) for each sponsor/developer and property management firm. Please note any previous experience in the County of San Bernardino.
4. Completed legal status questionnaire from the most recent version of the Universal Application (as shown in Attachment 8) for each sponsor/developer entity.
5. For each sponsor/developer entity, provide two public debt, two private debt, and two equity provider references with up-to-date contact information, including name, title, address, phone number, and e-mail address.
6. For each sponsor/developer entity, provide no fewer than 3 years' audited financial statements. If the reference date of the most recent audit is more than 90 days before application date, please also provide an internally-prepared financial statement covering the most recent period.

Project Information

1. Project information including project name, location, labeled photos of the site and/or project, labeled photos of adjacent uses, site location map, and map showing proximity to services.
2. A short narrative description of (a) the existing use of the project site; (b) existing (and proposed) uses of adjacent properties; (c) prominent characteristics of the surrounding area. Please describe the physical and socio-economic characteristics of the surrounding community.
3. Evidence of site control (or the anticipated legal and financial means of securing site control) and a current preliminary title report.
4. A short narrative description of the proposed rehabilitation and/or new construction project, including architectural design and scale, amenities to be provided, and how the project will fit into the surrounding neighborhood. Please comment on how the project will impact the neighborhood: if applicable, address issues of economic integration, elimination of blight, concentration of poverty. Describe the public benefit of the project.
5. Please identify which County supervisorial district the property is located in. Describe the results of any meetings the development team has had with the County Supervisor's office or other local public officials regarding the project.
6. A short narrative description of the status of entitlements for the project, including the following:

- a. Current zoning, land use designation, and general plan designation;
 - b. Current maximum density, building height limit, and required parking ratio;
 - c. Any land use entitlements applications in process or anticipated, including density bonuses, variances, conditional use permits, waivers, or incentives.
 - d. To the extent that any are available, please submit any letters from local public agencies evidencing that entitlements are in place.
7. If available, please submit a copy of an “as is” appraisal of the property.
 8. If available, please submit a copy of a Phase I Environmental Site Assessment (ESA) for the proposed project site completed according to ASTM standard. For existing developments, the ESA should also indicate the likelihood of the presence of lead-based paint and asbestos-containing materials.
 9. For new construction projects only, if available, please submit a copy of the soils analysis for the project site.
 10. For rehabilitation projects only, if available, please submit a copy of the most recent physical needs assessment for the project.

Project Financing Information

1. Provide a complete and transparent project proforma including each of the items outlined below. At the applicant’s discretion, this proforma can be provided either as a detailed, annotated Excel spreadsheet of the applicant’s own choosing, OR as the Universal Application pages 10 through 28. The proforma must include, at a minimum:
 - a. A detailed development budget that includes all project costs from predevelopment through stabilized occupancy. (For existing developments, indicate any tenant relocation costs necessary.)
 - b. A listing of sources of funds to cover the predevelopment phase, the construction phase, and the permanent phase.
 - c. A table showing the number of each size of unit, rent and utility levels, targeted levels of affordability, and indicating the basis of rent level calculations (i.e., set by California Redevelopment Law, TCAC, HCD, SSI, etc.)
 - d. A detailed first-year operating budget;
 - e. A minimum 20-year cash flow schedule, which shows all sources of income, operating expenses, any required debt service, and a full “waterfall” showing cash flow sharing, payments of residual receipts, payments of asset management fees, payments of deferred developer fees, and any and all expected payments to members of the development team.

2. Please provide copies of any commitment letters already in hand for any of the project financing sources listed in (b) above.
3. For existing developments, please also submit 3 years' operating statements for the project, a current rent roll, and a current property tax bill.

Project Timeline

1. Provide a full project timeline. The timeline must include information on any land use and development approvals required; land or project purchase; community outreach process; financing applications, approvals, and closing; and construction and lease-up.

If an applicant desires to protect certain proprietary information contained in its information package, then the applicant should clearly identify which sections or documents of the submittal are to be considered proprietary information. The applicant agrees that any sections or documents not identified as proprietary information will be deemed non-proprietary and may be made available to the public.

SBDBH will accept Pre-Application information packages through an "open window" process until all County MHSA funds are allocated. Packages should be addressed as follows:

**County of San Bernardino - Department of Behavioral Health
 Contracts Administration – RE: DBH 09-24
 Attn: Betty Aguirre, Staff Analyst II
 268 West Hospitality Lane, Suite 400
 San Bernardino, CA 92415-0026**

The Administrative Review Process

Within 15 days of receiving a Pre-Application, SBDBH will arrange a meeting between the applicant and the SBDBH Consultant Team representative to discuss and review the proposed project. The Consultant Team representative will analyze the Pre-Application and write a review memo for the Technical Review Committee (TRC). This committee will receive the technical review memo and Pre-Application at the same time. In the TRC meeting, the committee will meet to evaluate the Pre-Application and to determine if:

- a. the proposed project meets the goals of the MHSA Housing Plan
- b. the development team has sufficient experience to develop the project
- c. the applicant has sufficient financial capacity
- d. the applicant and project are ready to move forward

Based on the review of the TRC, the Consultant Team representative will provide the applicant with a written evaluation of the committee's findings, including identification of any technical issues that need to be resolved.

Once any technical issues have been satisfactorily resolved by the applicant, the Pre-Application will be presented to the Executive Committee for its consideration of approval. If approved to move forward, SBDBH will work with the applicant to prepare an MHSA application. Funding for the proposed project will be reserved for a period of 90 days in order to allow for completion and submission of the MHSA application. Applications not submitted within that timeframe will be dropped from their reservation of funds.

Pre-Applications will be reviewed in the order that they are received by SBDBH. However, each applicant will only proceed to the MHSA application stage when all technical issues have been satisfactorily resolved and the Executive Committee gives its approval to the project. Thus, an applicant with an unresolved technical issue could be delayed, while the project of a subsequent applicant may be given approval by the Executive Committee to prepare an MHSA application.

The MHSA Housing Plan has specific goals for identified target populations and for the geographic distribution of projects. If the funding available for any target population or geographic location has been fully reserved or approved for earlier applicants, then a subsequent Pre-Application may be rejected. SBDBH will update its website periodically with information on the availability of funding for various target populations and geographic locations.

Concurrently with review by the Technical Review Committee, SBDBH will provide contact information and /or arrange a meeting with an appropriate FSP for the selected target population (see Attachment 4, *Full Service Partnerships Contact List*). The applicant will contact the FSP to determine if the FSP will be able to provide services for the proposed supportive housing project, and if so, they will negotiate an agreement to collaborate. After a draft MOU agreement is reached, the two parties will work together to prepare the MHSA application.

The final MHSA application will be submitted to SBDBH, which will review it for completeness. In the event that SBDBH determines that the application deviates significantly from the Pre-Application submittal, then it will need to be presented again to the Executive Committee for its review and recommendation.

Once complete, an item will be scheduled on the agenda of the County Board of Supervisors to approve a commitment of supportive services to the project in accordance with the project's service plan and for the term of the State loan. It takes about six weeks to schedule an agenda item.

During the period prior to the Board meeting, SBDBH will post the following information on the SBDBH website for a 30-day public comment period¹:

¹ Posting of the application is not an indication of SBDBH support or approval of the project

- Development Summary Form (Attachment I of the MHSa application)
- Development Description Narrative
- Sections D.1 through D.5 of the MHSa application

At the close of the public comment period, the applicant and/or SBDBH Consultant Team representative will formulate responses to the comments that are received. The comments and responses will be posted on the SBDBH Website and modifications to the application will be made, as necessary. After the County Board of Supervisors approves the supportive services element, the SBDBH Executive Director will execute the necessary forms and the applicant will submit the final application to CalHFA and State DMH.

The State agencies require approximately 120 days to review and approve applications. First State DMH will review Sections D.1 through D.5 and then CalHFA will present the application to its senior MHSa loan committee for approval of the funding request.

For questions about these Guidelines for Applications, please contact:

Mr. Douglas Fazekas, Administrative Manager
County of San Bernardino Department of Behavioral Health
700 E. Gilbert St. Bldg. 6
San Bernardino, CA 92415
(909) 387-8619
dfazekas@dbh.sbcounty.gov

Attachments

1. MHSA Housing Program Application Process Chart
2. San Bernardino County Target Populations
3. San Bernardino County MHSA Housing Development Guidelines
4. Full Service Partnerships Contact Information
5. MHSA Term Sheet and Program Description (CalHFA)
6. Pre-Application Checklist
7. Development Summary Form
8. Legal Status Questionnaire

ATTACHMENT 1

San Bernardino MHSa Housing Program Application Process Chart

Activity	Responsible Parties	Estimated Timeframe	Cumulative Timeframe
Developer submits Pre-application Information Package to SBDBH	SBDBH: Betty Aguirre, Contracts	Begin	Begin
Meeting between SBDBH technical consultant and Applicant to discuss how the proposed project meets MHSa Housing Program goals and to confirm application process and timeframes	SBDBH: Doug Fazekas Consultant Team Representative*	15 days	15 days
Technical consultant prepares Pre-Application review memo for Technical Review Committee	Consultant Team Representative	5 days	20 days
Pre-application is presented to Technical Review Committee	Technical Review Committee	15 days	35 days
Technical consultant provides written evaluation to the Applicant on TRC findings and technical issues that need to be resolved	Consultant Team Representative	5 days	40 days
Concurrently with TRC review, SBDBH will link the Applicant with appropriate FSP to discuss services to target population	SBDBH: Doug Fazekas	15 days	Concurrent
When Applicant has resolved technical issues, Pre-Application will be presented to the Executive Committee for review and approval	SBDBH: Doug Fazekas	15 days	55 days
Applicant meets with the FSP to negotiate an agreement to provide services to project and prepare draft MOU	Applicant and FSP	15 days	Concurrent
If project is approved by the Executive Committee, Applicant and FSP work collaboratively to complete the MHSa Housing application, including sections D1. to D.5 (services plan)	Applicant and FSP	30-60 days	100 days (assume 45 days for prep)
Completed MHSa Housing Program Application submitted to SBDBH for review and SBDBH prepares posting for public comment period	SBDBH: Doug Fazekas	5 days	105 days
SBDBH Executive Director reviews application and schedules it for Executive Committee and/or Board of Supervisors agenda	SBDBH: Allan Rawland	10 days	115 days
If there is significant deviation from Pre-Application, then Executive Committee reviews	Executive Committee	15 days	Concurrent
Public Comment Period		30 days	145 days
Public comments addressed and responses incorporated into Board staff report	Applicant Consultant Team Representative	5 days	150 days
Board of Supervisors meeting	Board of Supervisors	6 weeks after initial posting	160 days
SBDBH Executive Director signs forms and MHSa application is sent to State agencies	SBDBH: Allan Rawland	5 days	165 days
State DMH to review and approve Section D; then CalHFA approval will be made by senior loan committee	State DMH & CalHFA	60 days	225 days
Feedback to State agencies; finalize loan approval	SBDBH: Doug Fazekas	15 days	240 days

*Consultant Team Representative is from the Corporation for Supportive Housing and/or LeSar Development Consultants.

ATTACHMENT 2

**SAN BERNARDINO COUNTY MHPA HOUSING PROGRAM
TARGET POPULATIONS**

FSP	Target population	SBDBH Regions	Housing Units
TAY-1	<p>Transition Age Youth (TAY) ages 16 – 25 with a serious mental illness who are enrolled or eligible for FSP services who also have one or more of the following situational characteristics:</p> <ul style="list-style-type: none"> ▪ Repeated use of emergency mental health services, ▪ Have co-occurring disorders, ▪ Homeless or at-risk of homelessness, ▪ At risk of involuntary hospitalization or institutionalization, ▪ High risk youth with serious emotional disturbances in the Justice System and Out-of-home placement, and/or ▪ Recidivists with significant functional impairment. 	<p>West Valley/ Central Valley</p> <p>East Valley/San Bernardino</p> <p>High Desert/ Mid Desert</p>	40
A-2 Criminal Justice	<p>Unserved adults with serious mental illness who are enrolled in or eligible for FSP services and who also have one of the following situational characteristics:</p> <ul style="list-style-type: none"> ▪ Been incarcerated and treated for mental illness while in jail ▪ Who are brought to outpatient clinics for service by law enforcement. 	Countywide	30
A-3 High User ACT	<p>Adults with serious mental illness enrolled in or eligible for FSP services who will have one or more of the following situational characteristics:</p> <ul style="list-style-type: none"> ▪ Homeless or at-risk of homelessness, ▪ Co-occurring substance abuse problems, ▪ Involved in the criminal justice system, ▪ Recently discharged from the psychiatric hospitals 	Countywide	60
OA-1 Older Adults	<p>Older Adults (60 and older) with a serious mental illness who are enrolled in or eligible for FSP services who will have one or more of the following situational characteristics:</p> <ul style="list-style-type: none"> ▪ Homeless or at-risk of homelessness, ▪ Unserved or, underserved, or inappropriately served in the mental health system, ▪ Frequent users of emergency room services for psychiatric problems or are frequently hospitalized, ▪ Reduced personal and/or community functioning due to physical and/or health problems, ▪ Co-occurring substance abuse problems, and/or ▪ Isolated and at-risk for suicide due to stigma surrounding their mental health problems. 	High Desert	20

ATTACHMENT 3**SAN BERNARDINO COUNTY MHSA HOUSING PLAN
DEVELOPMENT GUIDELINES****(Excerpted from Chapter 4 of the San Bernardino County MHSA Housing Plan)**

For projects developed using MHSA housing funds, the following guidelines shall apply:

1. MHSA Housing funding should be targeted for the provision of housing to specific populations in need living in San Bernardino County. Therefore, housing proposals selected for development should target the specific populations as called out in the San Bernardino County Community Services and Supports Plan including Transition-Age Youth, Adults and Older Adults, and individuals leaving institutionalization and incarceration.¹
2. Developers must involve client representatives and family members in the design and planning process for all new projects that have not already been through the design process.
3. Housing proposals selected for development should give FSP clients a variety of choices in the type and geographic location of housing accessible to them.
4. Housing proposals selected for development should be balanced between buildings that are 100% targeted for MHSA clients with buildings that include MHSA clients and units serving other populations. SBDBH must ensure that a variety of projects are developed, that efforts are made to minimize concentration of clients, and that at least some projects funded are mixed tenancy and some projects are small in size (25 units or less).
5. Housing proposals selected for development should serve FSP clients who have the most difficulty finding housing, particularly those below 30% of the Area median income.
6. In order to promote housing stability, projects selected for development should be retained as dedicated for mental health clients for the maximum time possible based on other funding requirements and continued need and availability of services, with a target goal of 55 years.
7. Housing proposals selected for development should have community space within the rental housing to include common meeting spaces, communal kitchens and/or gardens.
8. Housing proposals selected for development should be located near transportation, with access to health services, groceries, and other community amenities and services not provided on site.

¹ There may be additional funding and/or policy restrictions that would prevent housing individuals with criminal records. Project sponsors are encouraged to talk to SBDBH regarding this issue.

ATTACHMENT 3

SAN BERNARDINO COUNTY MHSA HOUSING PLAN DEVELOPMENT GUIDELINES

9. Housing development teams selected should include experienced housing developers and service providers committed to partnering and working together over the long-term.

10. Studio apartments dedicated to individual FSP clients should be designed for unit livability, meaning the space in the unit can accommodate the potential number of occupants and the basic pieces of common furniture necessary for daily activities, with a minimum size of 350 square feet.

ATTACHMENT 4

**San Bernardino Mental Health Services Act
FULL SERVICE PARTNERSHIPS
CONTACT INFORMATION**

Department of Behavioral Health Outpatient Clinics		
<u>Name</u>	<u>Contact Information</u>	<u>Target Population Served</u>
1. <u>BARSTOW COUNSELING AND MENTAL HEALTH CENTER</u>	805 E. Mountain View Barstow, CA 92311 (760) 256-5026	Adults, 18 to 59
2. <u>CIRCLE OF CARE</u>	11951 Hesperia Rd. Hesperia, CA 92345 1-800-451-5633	Older Adults
3. <u>HOMELESS INTENSIVE CASE MANGEMENT</u>	237 Mill St. San Bernardino, CA 92408 (909)-388-4131	Adults, 18-59
4. <u>MESA COUNSELING CENTER</u>	850 E. Foothill Blvd. Rialto, CA 92376 (909) 421-9233	Adults, 18-59
5. <u>ONE STOP TAY CENTER</u>	700 E. Gilbert St., Bldg # 4 San Bernardino, CA 92415 (909) 387-7194	Transitional Age Youth, 18-25
6. <u>PHOENIX COMMUNITY COUNSELING CENTER</u>	820 E. Gilbert St. San Bernardino, CA 92415 (909) 387-7200	Adults, 18-59
7. <u>SUPERVISED TREATMENT AFTER RELEASE (STAR)</u>	1330 Cooley Dr. Colton, CA 92324 (909) 423-0750	Adults, 18-59 (Forensic)
8. <u>UPLAND COMMUNITY COUNSELING CENTER</u>	934 N. Mountain View, Suite C Upland, CA 91786 (909) 579-8100	Adults, 18-59
9. <u>VICTOR VALLEY BEHAVIORAL HEALTH CLINIC</u>	12625 Hesperia Rd. Victorville, CA 92395 (760) 955-1777	Adults, 18-59
10. <u>VISTA COMMUNITY COUNSELING</u>	17216 Slover Ave., Bldg L Fontana, CA 92337 (909) 854-3420	Adults, 18-59
11. <u>ONTARIO COMMUNITY COUNSELING CLINIC (integrating the Chino Clinic)</u>	1647 E Holt Blvd. Ontario, CA 91761 (909) 933-6341	Adults, 18-59

ATTACHMENT 4

Contract Agencies (FSP Providers)		
<u>Name</u>	<u>Contact Information</u>	<u>Target Population Served</u>
12. <u>ASSERTIVE COMMUNITY TREATMENT (ACT)</u>	2080 S. E St. San Bernardino, CA 92408 (909) 388-9191	Adults, 18-59
13. <u>EMO CHILREN AND FAMILY SERIVCES</u>	572 N. Arrowhead Ave. San Bernardino, CA (909) 266-2700	Children and families
14. <u>FAMILY SERVICE AGENCY</u>	1669 N. E. St. San Bernardino, CA 92405 (909) 886-6737	Children and families
15. <u>FORENSIC ASSERTIVE COMMUNITY TREATMENT (FACT)</u>	2080 S East St. San Bernardino, CA 92408 (909) 388-9191	Adults 18-59, (Forensic)
16. <u>HIGH DESERT ONE STOP TAY CENTER</u>	14360 St. Andrews Dr., Ste 11 Victorville, CA 92395 (760) 245-4695	Transitional Age Youth, 18-25
17. <u>MEMBER ASSERTIVE POSITVIE SOLUTIONS (MAP)</u>	2080 S. E St. San Bernardino, CA 92408 (909) 388-9191	Adults, 18-59
18. <u>MORONGO BASIN MENTAL HEATLH</u>	55475 Santa Fe Trail Yucca Valley, CA 92284 (760) 365-5923	Adults, 18-59
19. <u>MORONGO ONE STOP TAY CENTER</u>	58945 Business Center Dr., #3 Yucca Valley, CA 92284 (760) 228-9657	Transitional Age Youth, 18-25
20. <u>VISTA GUIDANCE CENTER</u>	1323 W. Colton Ave. Redlands, CA 92374 (909) 355-7067	Children and adults
21. <u>WEST END ONE STOP TAY CENTER</u>	9047 Arrow Route, Suite 170 Rancho Cucamonga, CA 91730 1-877-760-0770	Transitional Age Youth, 18-25



**MENTAL HEALTH SERVICES ACT HOUSING PROGRAM
Term Sheet**

<p>Program Description</p>	<p>The Mental Health Services Act Housing Program (MHSa Housing Program) offers permanent financing and capitalized operating reserve subsidies (COSR) for the development of permanent supportive housing. This housing includes both rental housing and shared housing, and serves persons with serious mental illness who are homeless, or at risk of homelessness (as defined by the MHSa Housing Program), and who meet the MHSa Housing Program target population description. This program is jointly administered by the California Housing Finance Agency (CalHFA) and the Department of Mental Health (DMH) under an interagency agreement and in accordance with this term sheet, as amended from time to time by CalHFA and DMH.</p> <p>Please note that this program is designed to be flexible. CalHFA is authorized to grant exceptions to MHSa Housing term sheet on a case by case basis if needed to make a development financially viable, conform the program requirements to be compatible with other funding source requirements and or add more units for the target population. Exceptions will not be allowed for (1) funding for any form of leased housing, (2) deviations from serving the target population and (3) deviations from the approved housing types. (See the exception process at the end of this document).</p> <p>Please see the most recent Rental Housing and Shared Housing applications program guidelines (term sheet), and loan documents at the CalHFA website http://www.calhfa.ca.gov/multifamily/mhsa/index.htm.</p>
<p>MHSa Housing Program Target Population & Certification Requirements</p>	<ul style="list-style-type: none"> • DMH has defined the MHSa Target Population for the purposes of the MHSa Housing Program, as individuals who meet the following criteria: <ul style="list-style-type: none"> ❖ (1) Adults or older adults with serious mental illness as defined by Welfare and Institutions Code Section 5600.3(b). ❖ (2) Children and youth with severe emotional disorders as defined in Welfare and Institutions Code Section 5600.3(a). ❖ (3) In addition to meeting either (1) or (2) above, the individual shall be one of the following: <ul style="list-style-type: none"> ➢ Homeless, meaning living on the streets or lacking a fixed and regular night-time residence. This includes living in a shelter, motel or other temporary living situation in which the individual has no tenant rights. ➢ At risk of being homeless due to one of the following situations: (i) Transition age youth exiting the child welfare or juvenile justice systems. (ii) Discharge from crisis and transitional residential settings; a hospital, including acute psychiatric hospitals; psychiatric health facilities; skilled nursing facilities with a certified special treatment program for the mentally disordered; and mental health rehabilitation centers. (iii) Release from city or county jails. (iv) Temporarily placed in a residential care facility upon discharge from (ii) or (iii) above. (v) Certification by the county mental health

	<p>director as an individual who has been assessed by and is receiving services from the county mental health department and who has been deemed to be at imminent risk of being homeless.</p> <ul style="list-style-type: none"> • The county mental health department determines the eligibility of individuals applying for tenancy in an MHSA unit in compliance with the target population criteria.
<p>Types of Supportive Housing Available Under MHSA</p>	<ul style="list-style-type: none"> • Both Rental Housing Developments and Shared Housing Developments are permitted. • A Shared Housing Development is a residential building. All bedrooms in a Shared Housing Development are considered separate units and shall be occupied by an MHSA eligible resident, as determined by DMH and the sponsoring county mental health department. For purposes of the MHSA Housing Program funding, a bedroom in a Shared Housing Development is a unit. • A Rental Housing Development is an apartment building or buildings with no less than five residential units restricted for rent to MHSA eligible residents. • Master leasing is not allowed.
<p>Predevelopment Loans</p>	<ul style="list-style-type: none"> • Predevelopment loans of up to \$500,000 may be available to all Shared Housing Developments that have received an MHSA Housing Program permanent loan commitment, and can demonstrate site control and receipt of all required local planning approvals, with the exception of building permits. • Predevelopment loans of up to \$500,000 may be available to all Rental Housing Developments that have received an MHSA Housing Program permanent loan commitment, have obtained 30% of their permanent financing commitments based on dollar amount excluding tax credit equity, and can demonstrate site control and receipt of all required local planning approvals, with the exception of building permits, and in CalHFA's opinion are likely to receive the remaining construction and permanent financing commitments within the term of the MHSA permanent loan commitment. • There is no additional commitment fee for predevelopment loans but ½ of the 1% MHSA commitment fee will be due at loan commitment and ½ at predevelopment loan closing and will be funded from the proceeds of the predevelopment loan. • Predevelopment loan amounts cannot exceed the MHSA Housing Program permanent loan commitment for the development. • Only predevelopment loans used for acquisition of the development will be secured against the property. • Predevelopment loans may be recourse at CalHFA's discretion. • Interest will be 3% simple fixed. Payment of principal and interest shall be

	<p>deferred until the predevelopment loan maturity date.</p> <ul style="list-style-type: none"> • The predevelopment loan maturity date shall be due the sooner of two years from predevelopment loan closing, or the sooner of the first construction loan closing or the MHSA Permanent Loan Closing. • Predevelopment loan interest will be forgiven at MHSA permanent loan closing, so long as the MHSA permanent loan is funded. • If the MHSA permanent loan does not fund, the predevelopment loan principal and all accrued interest shall be due at the time of the predevelopment loan’s maturity. • Predevelopment loan funds will be available for (1) Purchase option costs, acquisition costs and costs associated with site acquisition are eligible costs for Shared Housing Developments and (2) predevelopment costs necessary to complete due diligence required for construction loan closing or permanent financing. Costs associated with repaying a portion of loan principal for acquisition loans that have matured may, at CalHFA’s discretion, be eligible costs for Rental Housing Developments. • Examples of eligible predevelopment costs include but are not limited to engineering studies and fees, Phase 2 studies, consultant fees, architectural fees, permits and other local fees, relocation expenses, costs for site preparation, third party studies and reports, legal fees, other expenses recoverable from the construction/permanent financing as approved by the Agency, and the MHSA Housing Program loan fee. • Staffing costs are not eligible costs for predevelopment loans.
<p>Permanent Loans</p>	<ul style="list-style-type: none"> • Permanent loan proceeds may be available at acquisition, at construction loan closing, or during the construction period if title insurance can be acquired. • Permanent loan proceeds may be used for allowable costs associated with the acquisition and development of the property, including reimbursing the developer for predevelopment and acquisition. Permanent loans will be secured against the property and the improvements by a promissory note, a deed of trust and a regulatory agreement. • Permanent loans, if funded during construction or rehabilitation may, at CalHFA discretion, be subject to a loan disbursement agreement. • Permanent loan limits will be based on the number of units restricted to MHSA eligible residents and the proportionate share of the manager’s unit and not on the total number of units in the proposed development. • MHSA Housing Program loan funds may trigger prevailing wage requirements. Applicants are advised to consult their attorney on this issue. • MHSA Housing Program target population requirements may trigger conflicts with federal funding sources. Applicants are advised to consult their attorney on this issue.

Loan Terms

- Origination Fee: 1% of the MHSA permanent loan amount. One-half of the fees will be due at execution of the final commitment and one-half will be due at MHSA permanent loan closing, or at MHSA predevelopment loan closing, whichever occurs sooner.
- A servicing fee of 0.42% of the original principal balance of the permanent loan shall be due and payable annually. This fee shall be paid to CalHFA, annually and in advance, for servicing and administrative services and shall be due January 1 of each year.
- If MHSA permanent loan proceeds are disbursed at construction loan closing, loan interest will accrue during the construction period but payment will be deferred. The 0.42% servicing fee will be charged during the construction period. Up to two years of servicing fees will be due as a lump sum in advance at the time of MHSA permanent loan closing.
- If MHSA permanent loan proceeds are not disbursed until construction is complete, a partial year from MHSA permanent loan closing until January 1 of the next year, and an additional full year of the 0.42% servicing fee shall be due as a lump sum, in advance, at permanent loan closing.
- The interest rate on MHSA Permanent Loans will be fixed at 3% simple interest. Accrued interest and principal payments, to the extent available, will be made on an annual basis from net cash flow (residual receipts), with the first payment due one year after issuance of the certificate of occupancy or if applicable at recorded Notice of Completion.
- All accrued and unpaid interest and principle attributable to the loan shall be due and payable upon maturity of the loan, unless this requirement has been modified by CalHFA under the circumstances described in the next paragraph.
- For projects which receive an allocation of tax credits, and which involve a limited partnership with a tax credit investor, the payment of unpaid interest attributable to any given year may be forgiven upon demonstration to CalHFA that the Development did not generate sufficient residual receipts to make a full or partial payment. In this circumstance, unpaid interest for that year will not be added to the principal loan amount. However, upon default, or if there are sufficient monies generated in connection with the sale or refinancing of the Development, such unpaid interest shall be due and payable.
- All residual receipts payments received by CalHFA will be credited toward pay down of accrued interest and principal shall be deposited back into the respective county's sub-account.
- The Borrower will be responsible for all external transaction costs and third party studies.
- The loan term for both Rental Housing Developments and Shared Housing Developments shall be 20 years or longer if required by other funding sources or if the California Tax Credit Allocation Committee has made an allocation of tax credits. Upon the request of the developer, the loan term

	<p>may be up to 57 years. The term of the regulatory agreement shall be coterminous with the loan.</p>
<p>Qualified Developers and Borrowers</p>	<p>The Development team must include <u>all</u> of the following:</p> <ul style="list-style-type: none"> ❖ For Rental Housing, Developers with a track record of 5 years of successful affordable rental housing development. A demonstrated history of developing supportive housing and or serving the target population is desirable. ❖ For Shared Housing, Developers that are stable and established organizations, with a history of successful development and or operation of a supportive housing development. ❖ A qualified borrower organized in the fashion described more fully below. ❖ A qualified service provider with 2 years of history serving the target population and ❖ A qualified property manager. The property manager must demonstrate that the staff supervising the project has a history working with supportive housing projects and with the target population. ❖ A qualified construction contractor/developer. Qualifications include a history of building at least two projects of a similar building type; a demonstrated familiarity with building affordable housing developments; a history of compliance with state and federal prevailing wage requirements, if applicable; and bonding capacity for the amount of the construction contract, if applicable. ❖ Please note that particularly for very small counties, when there are no qualified developers, and property managers available, exceptions may be made to the Developer team qualification requirements by CalHFA on a case by case basis. <p>Other developer options include</p> <ul style="list-style-type: none"> ❖ An affiliate of the county, redevelopment agency, local housing authority, or other public entity, created to hold properties financed by the MHSA Housing Program or an appropriate agency of the county. • The developer, the borrower and their respective affiliate organizations will be evaluated both for their ability to successfully develop and manage the real estate component of the development, and for their ability to partner with a lead service provider or service providers to deliver high-quality services to the target population. <p>The borrower must be legally organized as one of the following:</p> <ul style="list-style-type: none"> ❖ A limited partnership (LP) in which the managing general partner of the LP must be a 501(c)(3) corporation or a limited liability company (LLC) whose sole member or members are 501(c)(3) corporations; ❖ A 501(c)(3) corporation; ❖ An LLC whose sole member or members are 501(c)(3) corporations;

	<ul style="list-style-type: none"> ❖ An affiliate of a local redevelopment agency; ❖ An affiliate of the county, redevelopment agency, a local housing authority, or other public entity, created to hold MHPA Housing Program properties. <p>The borrower also must be organized as either</p> <ul style="list-style-type: none"> ❖ A single asset entity (in the case of a LP or LLC), or ❖ A separate legal entity that only holds properties that have MHPA Housing Program funding, as appropriate.
<p>Application Process</p>	<ul style="list-style-type: none"> • Applications shall be submitted to DMH and CalHFA via the county mental health departments, which shall apply for funding in conjunction with a qualified developer/borrower. The signed submission of the application by the county mental health department will signify the county’s approval of all of the following; <ul style="list-style-type: none"> ❖ The capital funding request for the development, ❖ The COSR funding request for the development, (if applicable), and ❖ A commitment by the county mental health department to provide funding for supportive services for the MHPA eligible residents for the term of the MHPA Housing Program loan. <p>All Rental Housing Developments will be required to submit a completed application with all attachments. The application form is posted on the DMH and CalHFA web sites. It includes MHPA Housing Program-specific requirements and the joint CalHFA, TCAC, CDLAC, and HCD application (“the Universal Application”).</p> <p>Shared Housing Developments have the option of submitting a completed application which includes the Shared Housing Universal Application and all attachments, or alternately they may submit their application in two parts, at two different times</p> <ul style="list-style-type: none"> ❖ The first part shall consist of Sections C (development partners) and Section D (30-day county review process documentation, request for COSR Service Plan and related materials), and along with a request for the loan and when applicable, a request for an operating subsidy. CalHFA and DMH will review the submittal and if approved, CalHFA will issue a conditional commitment letter for funding in advance of the site selection. This section of the application is subject to the 30 day local review process. This approval can cover multiple sites. ❖ The second part of the application will be submitted to both CalHFA and DMH once the property is selected, and subject to a purchase and sales agreement, and shall contain Section A (the Shared Housing Application) and Section B (supplemental property information), together with a letter from the county approving the site or sites. Upon receipt of the last two sections, CalHFA will underwrite the loan and subsidy request, and once it is approved, move quickly towards a loan closing.

<p>Due Diligence</p>	<p>The due diligence items identified in Section B of the MHSA Housing Program Application are required for all Rental Housing Developments applications. Preparation of this information will be at the developer's/ borrower's expense. Please note that there are separate checklists for Rental Housing Developments and Shared Housing Developments.</p> <p>Due diligence required for MHSA Housing Program pre-development loans, and permanent loan closings are available on CalHFA's website.</p> <p>CalHFA may require additional information from the Developer during the underwriting and loan closing processes.</p> <p>Please see Section B (supplemental materials) of the most recent Rental Housing and Shared Housing applications at the CalHFA website at http://www.calhfa.ca.gov/multifamily/mhsa/index.htm</p>
<p>Rental Housing Developments</p>	<p>Additional Terms for Rental Housing Developments</p> <ul style="list-style-type: none"> • The MHSA Housing Program will fund one-third of the costs of a Rental Housing Development up to a maximum of \$104,000 per MHSA Housing Program unit ("apartment"), as adjusted annually by a 4.00% inflation factor beginning January 1, 2010. • A minimum of 5 units in all Rental Housing Developments shall be set aside for MHSA eligible residents. The decision of how many units to set aside above the 5 unit minimum is a decision between the County and the developer. • Each MHSA Housing Program unit in a Rental Housing Development must have a lease signed by all adult members of the household. The lease must contain language that the unit must be occupied by an MHSA eligible resident. • Each MHSA Housing Program unit must be occupied by an MHSA eligible resident, as determined by DMH and the sponsoring county mental health department. • Rental Housing Developments may include both general occupancy buildings and special occupancy buildings. Special occupancy buildings include both senior housing and housing for homeless youth, as defined by California statute. • If there are other household members occupying the unit who are not MHSA eligible residents, and the eligible resident no longer resides in the unit, regardless of the reason, the other household members may continue to occupy the unit and rents may be adjusted. This occupancy may be allowed if the Rental Housing Development is a mixed-population development and the housing provider is able to supply a newly vacant non-MHSA Housing Program unit in the same development to an MHSA eligible resident. If the development is a single-population development, or if no non-MHSA Housing Program vacant units are available, the other household members may continue to occupy the unit for up to 90 days.

Capitalized operating subsidies, (if applicable to the development), will continue through the end of the 90 day period and the housing provider will work with the remaining household members to find alternate housing accommodations. After 90 days, the Borrower shall start eviction proceedings.

Essential Multifamily Program Design Elements

- All units in a Rental Housing Development shall include, at a minimum, a living area, a sleeping area, a kitchen area and a full bathroom. The kitchen area shall at a minimum consist of a sink, refrigerator, cupboard space, counter area, microwave or oven, and a two-burner stove or built-in cook top.
- Each unit with up to three bedrooms shall contain a bathroom and a half-bath. Units with four or more bedrooms shall contain two full bathrooms. A full bathroom shall consist of a toilet, sink and shower and/or bathtub. A half-bath shall consist of a toilet and a sink.
- All Rental Housing Developments will be required to have adequate office space for the resident manager, supportive services staff and have sufficient community space with handicap accessible bathrooms for meetings and tenant service programs. The site management space should be physically separate from the supportive services space. Exceptions to this policy must be approved by CalHFA.
- One unit may be made available for a manager's unit.
- CalHFA may approve, as part of an application, a request to use some rental units for Shared Housing in a Rental Housing Development, provided that the unit design allows for such a use, and that owner, in CalHFA's judgment has the experience and staffing necessary to operate the unit or units as Shared Housing, and adequately addresses this use in Section D of the application. Note: Each Rental Housing unit, regardless of the number of bedrooms rented as Shared Housing in that unit, shall only be eligible for the MHSA loan amount authorized for one Rental Housing unit.

Allowable Non-MHSA Funding Sources for Multifamily Developments

- The MHSA Housing Program will fund one-third of the costs of the MHSA Housing Program units in a Rental Housing Development up to the current allowable loan maximum per MHSA Housing Program unit. Two thirds of the costs must come from other sources. Note: This 1/3 ratio may be waived on an exception basis by CalHFA. This exception is most likely to be granted to small, non tax-credit developments and for developments in very small counties when other local funding sources are not available.
- Fully amortizing loans from other sources will be allowed for Rental Housing Developments that receive MHSA Housing Program capitalized operating subsidies if all of the following conditions are met:
 - Rents on the non-MHSA Housing Program units are high enough to fully support amortizing debt, and

	<ul style="list-style-type: none"> ➤ Annual operating budgets and annual audits are bifurcated sufficiently to ensure that the amortizing debt payments are not being paid from MHSA Housing Program units subsidized with COSR.
<p>Shared Housing Developments</p>	<p>Terms for Shared Housing Developments</p> <ul style="list-style-type: none"> • The MHSA Housing Program will fund all of the costs of a Shared Housing Development up to \$104,000 per bedroom as adjusted annually at a four percent (4%) factor beginning January 1, 2010, provided that each bedroom is restricted for rental to an MHSA eligible resident. Developers will not need to supplement MHSA Housing Program funds with other capital sources in Shared Housing Developments unless the costs exceed \$104,000 per bedroom. Note: this does not apply to apartment units in Rental Housing Developments that are used as Shared Housing. Those units shall only be eligible for the MHSA loan amount authorized for one Rental Housing unit, and not the Shared Housing loan amount authorized per bedroom. • Interest rates on Shared Housing Developments will be fixed at 3% simple interest. Principal and interest payments will be from residual receipts. • All residences shall be rented to two or more unrelated adults, each of whom qualifies as an eligible resident under the MHSA Housing Program. A lease must be signed by each occupant of the bedroom. • While this program is intended primarily for unrelated adult house-mates each of whom occupies a single bedroom, nothing in this definition excludes the spouse, adult partner, and/or child of an MHSA eligible resident from sharing the bedroom of the eligible resident, up to housing occupancy limits. <p>Essential Shared Housing Program Design Elements</p> <ul style="list-style-type: none"> • Each bedroom must be lockable. • In addition to the bedrooms, the Shared Housing Development must also contain a living area, a kitchen and full bathroom. Kitchens and living rooms need to be appropriately sized to accommodate the number of residents in each residence. Where possible, provisions should be made for a private or quiet area for a service provider to meet with residents. • Each Shared Housing Development with three bedrooms shall contain a minimum of a full bathroom and a half-bath. Each four or five bedroom Shared Housing Development shall contain two full bathrooms. A full bathroom shall consist of a toilet, sink and shower and/or bathtub. A half-bath shall consist of a toilet and a sink. Access to bathrooms shall not be through another resident's bedroom. • The maximum number of bedrooms per Shared Housing Development is five. • A Shared Housing Development may consist of a 1 to 4 unit building,

	<p>provided that all bedrooms in each unit in the building are targeted for use as Shared Housing. Single-family homes, condominiums, half-plexes, duplexes, triplexes and four-plexes will qualify as a Shared Housing Development provided that they have a minimum of two bedrooms.</p> <p>An applicant may apply for several Shared Housing Developments in the same application. In an application which includes several Shared Housing Developments, the sites may be geographically scattered.</p>
<p>General Rent and Occupancy Requirements</p>	<ul style="list-style-type: none"> • All MHSA Housing Program units must be targeted for occupancy by at least one MHSA eligible resident. • Rents in MHSA Housing Program units in both Rental Housing Developments and Shared Housing Developments must be restricted to 30% of 50% or less of the area median income (as adjusted by household size). • For units with MHSA Housing Program COSR, the tenant portion of the rent must be set at 30% of the current SSI/SSP grant amount for a single individual living independently, or 30% of total household income, whichever is higher (up to 30% of 50% of area median income). • The county mental health department must certify the eligibility of individuals meeting target population criteria. Individuals who have been certified are MHSA eligible residents. • If operating and/or other rental subsidies for the MHSA units are expected to be exhausted prior to the maturity date of the original MHSA permanent loan, the Borrower may submit to CalHFA a plan to transition of the use of these units to non-MHSA units. The plan shall be submitted at least two years prior to the expected depletion of the subsidies. The plan shall include, but not be limited to the following: <ul style="list-style-type: none"> ❖ An explanation of the efforts the Borrower has made to secure rental subsidies necessary to sustain the MHSA units from other sources like shelter plus care and Section 8. ❖ An explanation of the fiscal necessity of adjusting the number or use of the designated MHSA units. ❖ A process for increasing the rent and continuing to market and rent the MHSA units to members of the Target Population who do not require subsidies. ❖ The plan for continuing, throughout the term of the MHSA permanent loan, to apply for other subsidies, renewal of subsidies, and/or applications to the County for additional funds to subsidize the rental of MHSA units to members of the Target Population. <p>CalHFA's approval of the Borrower's transition plan will be based on CalHFA's assessment of the information provided and a review of the Development's overall financial feasibility. Rent increases above 30% of 50% of AMI will not be approved. Approval will also be conditioned on the Borrower's commitment to continue to seek other subsidies and commitment to</p>

	<p>continue to market to the Target Population.</p>
<p>Allowable Costs and General Requirements</p>	<ul style="list-style-type: none"> • All costs normally allowed as development costs for supportive housing by CalHFA are allowable costs for MHSA Housing Program loans. • Developer fees may be no higher than those allowed by TCAC and will be reviewed individually for appropriateness. • If the Development receives a COSR award and is subject to ground lease payments, the pro-rata share of the ground lease payments for the MHSA units must be capitalized in the development budget, and cannot be amortized over the term of the loan, unless there is sufficient cash flow from the non-MHSA units to pay the entire ground lease payment. • All developments will be required to apply for the “welfare tax exemption” (property tax exemption), and will be required to maintain that exemption for the term of the loan.
<p>Allowable Non-MHSA Funding Uses</p>	<ul style="list-style-type: none"> • The applicant must provide 100% of the capital costs of the non-MHSA Housing Program units from other sources. The resident managers’ unit shall be prorated. • Capital costs above the MHSA Housing Program funding limits for Rental Housing Developments and Shared Housing Developments may be obtained from grants, tax credits, other loans from governmental and private loan sources, and other county mental health funds. • Developers are advised to consult their attorneys regarding potential legal conflicts between different housing funding sources.
<p>Subordinate Financing</p>	<ul style="list-style-type: none"> • Subordinate loans or grants are encouraged from local government and third parties to achieve project feasibility. • The MHSA Housing Program Regulatory Agreement and Regulatory Agreement (The MHSA Permanent Loan Documents) may be subordinate to conventional construction loan documents, fully amortizing permanent loans, and HUD 811 Use Agreements and loan documents. Subordination to other HUD documents may be considered on a case-by-case basis. • The MHSA Permanent Loan Documents may be subordinate, upon CalHFA approval, to other residual receipts/deferred permanent loans and regulatory agreements and use restrictions from federal, state, and local sources provided that those loans are equal to or greater than the amount of the MHSA Housing Program Loan. Regulatory agreements and use restrictions from federal, state, and local sources whose loans are less than the MHSA Housing Program Loan may at CalHFA’s discretion, be in a superior position to the MHSA Loan Documents. • The MHSA Permanent Loan Documents may be subordinate to recorded redevelopment plans. • If the MHSA loan is secured by a ground lease, the ground lease will be subject to approval by CalHFA. Borrowers are encouraged to seek CalHFA

	<p>approval of ground leases as soon as possible.</p> <ul style="list-style-type: none"> • Approved ground leases will be permitted provided that the ground lease is of a sufficiently duration to protect the MHSA permanent loan. • When there is a public entity ground lessor, the MHSA loan documents will be recorded against the leasehold interest, but not against the fee interest, provided that no other lenders loan documents are recorded against the fee interest. • When there is a private entity ground lessor, the MHSA loan documents will be recorded against the leasehold interest, and may be recorded against the fee interest at CalHFA's discretion. • All other loan documents, loans, leases, recorded use agreements, and recorded grant agreements must be subordinate to the MHSA Permanent Loan Documents.
<p>Reserve Requirements</p>	<p><u>Operating Expense Reserve</u></p> <ul style="list-style-type: none"> • A minimum of three months of the first year's anticipated operating cost, but no more than 12 months of anticipated first year's operating costs, will be capitalized as an MHSA required operating expense reserve. This reserve may be held by CalHFA for the term of the MHSA Housing Program loan. <p><u>Supplemental Reserves Units</u></p> <ul style="list-style-type: none"> • Supplemental COSR reserve funds may be required by CalHFA for use by the MHSA restricted units in the event that the COSR does not subsidize the MHSA COSR units for a minimum of 15 to 18 years. These funds may be held by the Agency and disbursed per the terms of a Capitalized Operating Subsidy Reserve Agreement. • CalHFA may require an additional reserve for Rental Housing Developments where the non-MHSA Housing Program unit rents are too low to make the project feasible. This reserve will be funded with non-MHSA sources and CalHFA may hold this reserve. <p><u>Replacement Reserve</u></p> <ul style="list-style-type: none"> • There is no capitalized replacement reserve deposit requirement for new construction. • There will be a capitalized replacement reserve deposit requirement for developments involving acquisition/rehabilitation if indicated by a replacement reserve over time analysis. • A minimum annual replacement reserve deposit of \$500 per unit per year will be required for all new construction Rental Housing Developments. This requirement may increase for developments which involve acquisition/rehabilitation if indicated by the replacement reserve over time analysis. This requirement applies to both MHSA units and non MHSA units. • A minimum annual replacement reserve deposit of \$2,500 per building or

	<p>\$500 per bedroom per year, which ever is higher will be required for all new construction Shared Housing Developments. This requirement may increased for developments which involve acquisition/rehabilitation if indicated by the replacement reserve over time analysis.</p>
<p>MHSA Capitalized Operating Subsidy Reserve (“COSR”)</p>	<ul style="list-style-type: none"> • COSR, in an amount determined by CalHFA, may be available for developments that receive MHSA Housing Program permanent loan funds. No COSR will be available for a project that does not receive an MHSA Housing Program Permanent loan. • The borrower and the county mental health department may apply for a reservation of the COSR subsidy for the MHSA Housing Program units up to a maximum of \$104,000 per unit, adjusted by a 4% inflation factor beginning on January 1, 2010, and annually thereafter. • Only the operating costs of MHSA Housing Program units, which includes the proportional share of the resident manager’s unit, may be subsidized with capitalized operating subsidies. Non-MHSA Housing Program unit costs, including supportive services, are not eligible for COSR subsidies. • Note: For underwriting purposes, and only to determine the tenant portion of the rent, and the amount of COSR required at Final Commitment, CalHFA will assume that one person will occupy the MHSA studio and one bedroom apartments. For two bedroom and larger apartments, CalHFA will assume that at least one of the bedrooms will be occupied an adult eligible for SSI/SSP and the other units will be occupied by a child eligible for Cal WORKS. • COSR funds may not be used to make amortized debt service payments for Rental Housing Developments and Shared Housing Developments, or residual receipts payments. COSR may be used to make the 0.42% required annual debt service payment for HCD MHP loans, provided that the payment is in proportion to the number of units in the Development which receive COS funds, and the proportionate share of the manager’s unit. Note: CalHFA may grant an exception on a case by case basis to either allow COSR to fund amortized debt payments or to increase the capital amount of the MHSA permanent loan to eliminate amortizing debt for Shared Housing. This exemption will be primarily for very small counties where no other public funds are available. • COSR subsidies will be sized to allow for operating subsidies for up to 20 years. <ul style="list-style-type: none"> ❖ A development’s COSR will be sized and determined by CalHFA based on a review of the difference between the projected income for the MHSA COSR subsidized units the operating expenses in the first-year operating budget, assuming an annual income escalator factor and an annual expense cost escalator factor. ❖ Interest earnings on the COSR will be factored into the amount of available subsidy. ❖ The COSR will be capitalized at MHSA Housing Program permanent

	<p>loan closing, and held by CalHFA in an interest-bearing reserve account.</p> <ul style="list-style-type: none"> • The COSR is for use by MHSA units only and will not be the property of the development. • COSR awards will be made at loan commitment but will be conditioned upon a determination, prior to permanent loan closing, that the developer has applied in good faith for other available rental housing subsidies for the development, and been unsuccessful in its application(s). Developers will be asked to identify the rental subsidy source or sources for which they have applied for or which they are planning to apply for and why they are pursuing that source. The determination of the appropriateness of the source will be made during the underwriting process. Documentation of good faith application to the alternate source or sources will be required during the underwriting process. • Developers will only be required to apply for other subsidies in at least one award cycle, and may be required to apply in a second cycle at CalHFA's discretion. • If the development receives an allocation of operating subsidies for the MHSA units from another source prior to the first draw on the MHSA COSR account, CalHFA, may at its discretion, return COSR subsidies not expected to be used during the 20 year term of the COSR agreement back to the County sub account. • Developments that receive rental or operating subsidy contracts from other sources may also apply for a back-up award for MHSA for the time period not covered by other subsidy contract(s), or for any shortfall not covered by other subsidy awards during their term(s), provided that the Developer agrees to apply for all available extensions of subsidy contract(s). • In year 15, and every 5 years thereafter, the COSR account of a development will be reviewed by CalHFA. Funds not anticipated to be utilized during the remaining term of the COSR agreement may be returned to the County sub-account at CalHFA's discretion for use in as COSR in another development with a MHSA Housing Program loan in the same county. • Developments that receive rental or operating subsidy contracts from other sources for less than the total number of MHSA units may apply for COSR reserves for the remaining MHSA units, provided that they agree to apply for all available extensions of subsidy contract(s). • Capitalized Operating Subsidy Reserve funds shall not be available for disbursement until the later of: (a) MHSA Permanent Loan Closing and full disbursement of the MHSA Permanent Loan; or (b) Certificate of Occupancy or recorded Notice of Completion if applicable and submission to CalHFA of documentation required in the COSR agreement. • The first advance of COSR will include the first full year of subsidy for the COSR units and a per diem of the COSR from the completion date to the first day of the next quarter. Starting in the second year, advances of
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	<p>COSR will be made quarterly.</p> <ul style="list-style-type: none"> • The first advance of COSR may include the anticipated tenant portion of the subsidized rent for one full year. This will allow the borrower to assist the MHSA eligible residents in applying for SSI and other available sources of income. This additional subsidy is intended to make the project whole while residents are going through the SSI application/appeal process. Note: the intent is for these funds to be recycled. Borrowers are advised to include clauses in their leases that require the tenants to reimburse them for back rent due when they begin to receive SSI disability benefits. • The capitalized operating subsidy payments will be reconciled with actual operating costs every year. • No distributions of surplus cash or residual receipts may be made to the borrower for non-project purposes from excess capitalized operating subsidies. Any surplus cash attributable to the capitalized operating subsidies, based on the annual audit, must be held by the development for the next year's operating expenses and the next year's capitalized operating subsidies allocation will be adjusted accordingly. • COSR shall be used to pay: <ul style="list-style-type: none"> ❖ Approved Operating Expenses in excess of actual Development income attributable to the MHSA Units, and a proportionate share of the manager's unit. ❖ The annual servicing fee of 0.42% attributable to the MHSA capitalized operating subsidy units, and a proportionate share of the attributable to the manager's unit. ❖ The balance of the COSR may be used to pay the following, if funds are available after payment of approved operating expenses and the 0.42% annual servicing fee, in the priority order specified below: <ul style="list-style-type: none"> ➤ If the development has a HCD Multifamily Housing Program (MHP) loan, the 0.42 percent required annual interest payment of the principal amount of the MHP loan, attributable to the COSR units, and a proportionate share of the manager's unit. ➤ Annual bond issuance fees, if any, attributable to the COSR units. ➤ Partnership management fees of up to \$30 per month per COSR unit - not to exceed the maximum \$18,000 allowable annual fee for all units, as adjusted for inflation. This applies to only those developments which have an allocation of tax credits, and whose ownership structure is a limited partnership with an equity investor as the limited partner. ➤ An annual Operating Reserve deposit not to exceed three percent (3%) of anticipated gross income for the relevant year attributable to the COSR units. ➤ Approved deferred developer fees, if any, attributable to the COSR units. This applies to only those developments which have an allocation of tax credits, and whose ownership structure is a limited
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	<p>partnership with an equity investor as the limited partner.</p> <ul style="list-style-type: none"> ➤ Service coordinator salaries and benefits attributable to the COSR units. ❖ COSR shall not be used to pay for the following project costs: <ul style="list-style-type: none"> ➤ amortized debt service payments, ➤ ground lease payments, ➤ asset management fees ➤ partnership management fees in excess of the proportional share of the \$18,000 per development allowed in the MHSA Housing Program as adjusted for inflation, ➤ the operating costs of any non-MHSA Unit, ➤ the operating costs of any MHSA Units for which the Borrower did not apply for and receive a COS award, ➤ cash distributions to the Borrower, ➤ residual receipts payments to other lenders, or ➤ lump sum pay off of other loans.
<p>Occupancy Requirements, Reduction or Termination of the Capitalized Operating Subsidy Reserve (COSR)</p>	<ul style="list-style-type: none"> • Occupancy will be reviewed annually for compliance with MHSA Housing Program requirements. • COSR will be reduced or terminated for developments that do not rent their MHSA Housing Program units to MHSA eligible residents. • COSR will be reduced or terminated for MHSA Housing Program units when the MHSA eligible resident has a housing choice voucher (HCV), absent mitigating circumstances. • COSR will be reduced or terminated for MHSA units that receive project-based rental subsidies from other sources. • COSR is only available while an MHSA eligible resident resides in the unit and is paying the tenant portion of the rent. COSR is not available when the eligible tenant has moved out of the unit unless one of the following exceptions is met: <ul style="list-style-type: none"> ❖ COSR may continue for up to two months upon vacancy of an MHSA Housing Program unit that receives a capitalized operating subsidies. ❖ COSR will continue if the MHSA eligible resident is in a hospital, an acute or long-term care facility, or other institutional setting for up to three months, provided the MHSA eligible resident is expected to return within the three-month period, and the tenant, or service provider or county informs the property manager in writing, and provided that the

	<p>MHSA tenant portion of the rent is kept current;</p> <ul style="list-style-type: none"> ❖ COSR will continue for up to 90 following the date the MHSA eligible resident moves out of the unit when the eligible resident resides in the unit with other household members who are not MHSA eligible residents; and ❖ If family members who are not MHSA eligible residents continue to reside in the unit after the MHSA eligible resident moves out, they must be given timely legal notice that: (1) the capitalized operating subsidy will be terminated after 90 days; and (2) upon termination, that the unit rent will be increased to the market rent or the highest restricted rental rate applicable to the development.
<p>Supportive Services</p>	<ul style="list-style-type: none"> • All applications must include a supportive services plan, which must meet MHSA Housing Program requirements and must be approved by DMH. • The borrower must provide a clearly articulated supportive services delivery program. • The supportive services provided must be appropriate to MHSA eligible residents, and designed to assist those residents to live independently. • The borrower must have a commitment for supportive services funding from the county mental health department upon submission of the MHSA Housing Program loan application. • All developments must identify a qualified service provider that will provide supportive services to the residents. In the event that there are multiple service providers, the application must identify a primary service provider for the development. The borrower will be required to arrange for the provision of supportive services for the term of the MHSA Housing Program loan. • A supportive services budget, including staffing ratios, will be required one hundred and twenty (120) days prior to anticipated lease up or upon the closing of the MHSA Housing Program Loan, at the county's and borrower's election. • The property management agent and the primary service provider may be the same entity, provided that there is a clear separation of staff and a delineation of their separate roles and responsibilities. • MHSA projects must have a Memorandum of Understanding (MOU) between the developer, the primary service provider(s), the property management company, and the county mental health department. The property management agent and the primary service provider may be related entities, provided there is a clear separation of staff and a clear delineation of their separate roles, staffing and responsibilities in the MOU. A draft of the MOU will be required with the application, and an executed MOU approved by CalHFA and State DMH will be due 120 days prior to anticipated lease up.

<p>Asset Management</p>	<ul style="list-style-type: none"> • All MHSA projects must have an executed management contract with a qualified property management agent with experience with the target population. • CalHFA will hold the COSR and disburse it according to the terms of the COSR Agreement. • Replacement reserves and regular operating reserves for the development may be held by CalHFA. This requirement may be waived at CalHFA's discretion. • Taxes and insurance may be impounded by CalHFA. This requirement may be waived at CalHFA's discretion. • All developments will be required to submit quarterly financial reports. This requirement may be waived, or more frequent reporting may be required, at CalHFA's discretion. • All developments will be required to submit an annual operating budget, and an annual supportive services budget. • All developments will be required to submit an annual audit prepared by a certified public accountant in accordance with commonly accepted accounting standards. CalHFA will accept a different form of financial certification for Shared Housing Developments and small Rental Housing Developments of 25 or fewer units. • All mixed-use developments which receive a MHSA COSR will be required to submit a bifurcated annual audit. The bifurcated audit must distinguish actual annual income and expenses of MHSA units that receive capitalized operating subsidies from those units that do not receive the subsidies. • Please see the CalHFA website for a sample regulatory agreement http://www.calhfa.ca.gov/multifamily/mhsa/index.htm .
<p>Small Counties</p>	<p>Small Counties</p> <ul style="list-style-type: none"> • Eight percent of the total funds allocated to the MHSA Housing Program by DMH will be allocated for small counties. The MHSA funds set aside for small counties are currently estimated to be approximately \$32 million of the available \$400 million initial allocation. • To be identified as "small," the county must have 200,000 or fewer residents based on the most recent census. • The application process will be the same for large and small counties. However, CalHFA may waive some of the program requirements for small county applications. Requests for waivers will be reviewed on a case-by-case basis. Please contact CalHFA if an exception is needed for project feasibility. • County specific funds may be combined by small counties to create

	<p>developments that serve regional needs.</p> <p>While it is anticipated that the MHSAs Housing Program is sufficiently flexible to meet the needs of small counties, alternate program provisions may be developed if they are needed to address the unique needs of small counties.</p>
<p>County Allocations</p>	<p>MHSA Loan Allocations Per County</p> <p>The county mental health department must certify the eligibility of individuals meeting target population criteria.</p> <ul style="list-style-type: none"> • A total of \$400 million has been made available from the MHSAs for housing development and operating subsidies under this program. • Each county received a portion of the \$400 million and most have assigned those funds to CalHFA. • MHSAs loans and COSR funds are limited to the funds available in the CalHFA-held county sub-account plus any interest earned . • Counties are able to assign additional funds to their sub-account. Account balances can be found in the Semi Annual Report on the DMH website at http://www.dmh.ca.gov/Prop_63/MHSA/Housing/default.asp • Nothing shall prohibit county mental health departments from utilizing other available funds for this program to supplement available funds in their account.
<p>Reporting</p>	<ul style="list-style-type: none"> • County mental health departments must meet all DMH Outcomes Reporting requirements. ❖ The primary service provider and borrower will be required to provide information to CalHFA and State DMH regarding supportive services delivery to and housing outcomes for MHSAs eligible residents, on an MHSAs Housing Program Annual Self-Certification form (see CalHFA website http://www.calhfa.ca.gov/multifamily/mhsa/index.htm .
<p>Exception Process</p>	<p>CalHFA may grant exceptions to MHSAs Housing Program requirements upon written request from the county mental health department and/or the sponsor/borrower. Only the county mental health department may request an increase in the allowable maximum loan amount. Please note: the developer/borrower is be responsible for notifying the county mental health department when they submit an exception request.</p>

	<p>Unless prior written approval is received from CalHFA, the county mental health department and the sponsor/borrower must maintain compliance with all program requirements.</p> <p>No exceptions will be considered for any form of leased housing, deviations from serving the target population or from the approved housing type.</p> <p>CalHFA may exempt the county mental health department and/or the sponsor/borrower from compliance with any program requirements upon receipt and approval of a submittal substantiating evidence supporting the request and justifying the proposed alternative.</p> <p>Within 30 days of receipt of a request for an exception, CalHFA will provide written notice to the county mental health department and/or the sponsor/borrower, that either (1) the request with substantiating evidence has been received and accepted for consideration, or (2) the request is deficient. If the request is deficient, CalHFA will describe the additional information required for the request to be acceptable and establish a timeframe for receipt of the additional information. If the county mental health department and/or the sponsor/borrower fail to comply with the CalHFA-established timeframe for submission of additional information, the exception request will be denied.</p> <p>Within 30 days of receipt of an acceptable request for an exception, CalHFA will provide written notice to the county mental health department and/or the sponsor/borrower, that the request has been approved, denied, or accepted with conditions and modifications.</p>
<p>Questions</p>	<p>Policy questions regarding the MHSA Housing Program may be directed to CalHFA's Multifamily Programs Division:</p> <p style="padding-left: 40px;">Kathy Weremiuk, Chief, Multifamily Programs Phone: (310) 342-1256; Fax: (310) 342-1225 Email: kweremiuk@calhfa.ca.gov</p> <p>Questions regarding prospective and submitted MHSA Housing Program loan applications may be directed to the following persons in CalHFA's Multifamily Programs Division:</p> <p style="padding-left: 40px;">Nanette Guevara, Loan Officer Phone: (916) 324-9844; Fax: (916) 327-5115 Email: nquevara@calhfa.ca.gov</p> <p style="padding-left: 40px;">Debra Starbuck, Loan Officer Phone: 530.878.8075; Fax: 530.878.8075 Email: dstarbuck@calhfa.ca.gov</p> <p style="padding-left: 40px;">Matt Mielewski, Loan Officer Consultant Phone: 310-342-1262, Fax 310-342-1226 Email: mmielewski@calhfa.ca.gov</p> <p>Questions on the Mental Health Services Act and the MHSA Housing Program</p>

	<p>requirements may be directed to DMH's MHSAs Special Projects unit:</p> <p>Jane Laciste, Chief, Special Projects Phone: (916) 654-3529 Email: jane.laciste@dmh.ca.gov</p>
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IMPORTANT DISCLOSURE INFORMATION:

While this term sheet attempts to provide accurate information, additional terms and conditions may apply. This program guideline may be amended from time to time by CalHFA and DMH without prior notice.

ATTACHMENT 6

Pre-Application Checklist

Check Items Attached	Attachment #	Attachment*	Acceptable (FOR AGENCY USE ONLY)
OVERVIEW MATERIALS			
<input type="checkbox"/>	1.	Cover Letter	<input type="checkbox"/>
<input type="checkbox"/>	2.	Pre-Application Checklist	<input type="checkbox"/>
<input type="checkbox"/>	3.	CalHFA Development Summary Form	<input type="checkbox"/>
<input type="checkbox"/>	4.	CalHFA Development Description	<input type="checkbox"/>
DEVELOPMENT TEAM INFORMATION			
<input type="checkbox"/>	1.	Description of Development Team	<input type="checkbox"/>
<input type="checkbox"/>	2.	Contact Information for Development Team Members	<input type="checkbox"/>
<input type="checkbox"/>	3.	Development Team Members' Resumes & Previous Participation	<input type="checkbox"/>
<input type="checkbox"/>	4.	Legal Status Questionnaire	<input type="checkbox"/>
<input type="checkbox"/>	5.	Sponsor/Developer References	<input type="checkbox"/>
<input type="checkbox"/>	6.	Sponsor/Developer Financial Statements	<input type="checkbox"/>
PROJECT INFORMATION			
<input type="checkbox"/>	1.	Project Data	<input type="checkbox"/>
<input type="checkbox"/>	2.	Narrative Description of Existing Uses of Project Site & Environs	<input type="checkbox"/>
<input type="checkbox"/>	3.	Evidence of Site Control & Preliminary Title Report	<input type="checkbox"/>
<input type="checkbox"/>	4.	Narrative Description of Proposed Rehab or New Construction	<input type="checkbox"/>
<input type="checkbox"/>	5.	Status of Entitlements	<input type="checkbox"/>
<input type="checkbox"/>	6.	"As Is" Appraisal (if available)	<input type="checkbox"/>
<input type="checkbox"/>	7.	Phase I Environment Site Assessment (if available)	<input type="checkbox"/>
<input type="checkbox"/>	8.	Soils Report (if available) (for new construction projects only)	<input type="checkbox"/>
<input type="checkbox"/>	9.	Physical Needs Assessment (if available) (for rehab projects only)	<input type="checkbox"/>
PROJECT FINANCING INFORMATION			
<input type="checkbox"/>	1.	Project Proforma	<input type="checkbox"/>
<input type="checkbox"/>	2.	Financing Commitment Letters (to the extent available)	<input type="checkbox"/>
<input type="checkbox"/>	3.	Operating Statements/Rent Roll/Property Tax Bill (for existing projects only)	<input type="checkbox"/>
PROJECT TIMELINE			
<input type="checkbox"/>	1.	Full project timeline	<input type="checkbox"/>
OTHER INFORMATION			
<input type="checkbox"/>	1.	Any other information that should be disclosed to San Bernardino County regarding the proposed project	<input type="checkbox"/>

* For fuller descriptions of the items listed, please see Guidelines for Application pages 5 through 8, "The Pre-Application Information Package."

ATTACHMENT 7

**DEVELOPMENT SUMMARY FORM
MHPA Housing Program**

Development InformationCounty Mental Health Department: San Bernardino

Name of Development: _____

Site Address(es): _____

City: _____ State: _____ ZIP: _____

Development Sponsor: _____

Development Developer: _____

Primary Service Provider: _____

- New Construction
 Acquisition/Rehabilitation of an existing structure

Type of development: Rental Housing Shared HousingType of building: Apartment Building Single Family Home
 Condominium Other

Total number of units: _____ Total number of MHPA units: _____

Total cost of the development: _____

Amount of MHPA funds requested: _____

Request MHPA funds for Capitalized Operating Subsidies: _____

Other Rental Subsidy sources (list if applicable): _____

Target Population (please check all that apply):

Adults
 Transition-Age Youth
 Children
 Older Adults

County ContactName and Title: Douglas M. Fazekas, Administrative Manager, Dept. of Behavioral HealthPhone Number: 909-387-8619Email: dfazekas@dbh.sbcounty.gov

ATTACHMENT 8

LEGAL STATUS QUESTIONNAIRE

UA Version 3/12/09

For purposes of the following questions, and with the exceptions noted below, the term "applicant" shall include the applicant and the project sponsor, the parent of the applicant and the project sponsor, and any subsidiary of the applicant or project sponsor if the subsidiary is involved in (for example, as a guarantor) or will be benefited by the application or the Project.

In addition to each of these entities themselves, the term "applicant" shall also include the direct and indirect holders of more than ten percent (10%) of the ownership interests in the entity, as well as the officers, directors, principals and senior executives of the entity if the entity is a corporation, the general and limited partners of the entity if the entity is a partnership, and the members or managers of the entity if the entity is a limited liability company. For projects using tax-exempt bonds, it shall also include the individual who will be executing the bond purchase agreement.

The following questions must be responded to for each entity and person qualifying as an "applicant," as defined above. Explain all positive responses on a separate sheet and include with this questionnaire in the application.

Exceptions:

Public entity applicants without an ownership interest in the proposed Project, including but not limited to cities, counties, and joint powers authorities with 100 or more members, are not required to respond to this questionnaire.

Members of the boards of directors of non-profit corporations, including officers of the boards, are also not required to respond. However, chief executive officers (Executive Directors, Chief Executive Officers, Presidents or their equivalent) must respond, as must chief financial officers (Treasurers, Chief Financial Officers, or their equivalent).

Civil Matters

1. Has the applicant filed a bankruptcy or receivership case or had a bankruptcy or receivership action commenced against it, defaulted on a loan, or been foreclosed against in the **past ten years**? If so, please explain. [REDACTED]

2. Is the applicant **currently** a party to, or been notified that it may become a party to, any civil litigation that may materially and adversely affect (a) the financial condition of the applicant's business, or (b) the Project that is the subject of the application? If so, please explain. [REDACTED]

3. Have there been any administrative or civil settlements, decisions, or judgments against the applicant within the **past ten years** that materially and adversely affected (a) the financial condition of the applicant's business, or (b) the Project that is the subject of the application? If so, please explain and state the amount. [REDACTED]

4. Is the applicant **currently** subject to, or been notified that it may become subject to, any civil or administrative proceeding, examination, or investigation by a local, state or federal licensing or accreditation agency, a local, state or federal taxing authority, or a local, state or federal regulatory or enforcement agency? If yes, please explain. [REDACTED]

- 5. In the **past ten years**, has the applicant been subject to any civil or administrative proceeding, examination, or investigation by a local, state or federal licensing or accreditation agency, a local, state or federal taxing authority, or a local, state or federal regulatory or enforcement agency that resulted in a settlement, decision, or judgment? If yes to either question numbers 4 or 5, please explain.

[Redacted]

Criminal Matters

- 6. Is the applicant **currently** a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, involving, or that could result in, **felony charges** against the applicant? If so, please explain.

[Redacted]

- 7. Is the applicant **currently** a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, involving, or that could result in, **misdemeanor charges** against the applicant for matters **relating to the conduct of the applicant's business**? If so, please explain.

[Redacted]

- 8. Is the applicant **currently** a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, involving, or that could result in, criminal charges (whether felony or misdemeanor) against the applicant for any **financial or fraud related crime**? If so, please explain.

[Redacted]

- 9. Is the applicant **currently** a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, that could **materially affect the financial condition of the applicant's business**?

[Redacted]

- 10. Within the **past ten years**, has the applicant been convicted of any felony? If so, please explain.

[Redacted]

- 11. Within the **past ten years**, has the applicant been convicted of any **misdemeanor related to the conduct of the applicant's business**? If so, please explain.

[Redacted]

- 12. Within the **past ten years**, has the applicant been convicted of any **misdemeanor for any financial or fraud related crime**? If so, please explain.

[Redacted]

PRINTED NAME OF APPLICANT/PROJECT SPONSOR ENTITY

SIGNATURE (Applicant/Project Sponsor)

DATE

PRINTED NAME OF SIGNATORY

PRINTED TITLE OF SIGNATORY