



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

**30-Day Posting
Public Review Period for
Project Phoenix Apartments
Under the MHSA Housing Program**

March 4, 2011



ALLAN RAWLAND, MSW, ACSW
Director

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March 4, 2011

Notice of Initiation of 30-Day Public Review Period for the Phoenix Apartments under the MHSA Housing Program

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

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

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

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

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

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

Sincerely,

Allan Rawland, MSW, ACSW
Director

AR:LM:DF:cv

RENTAL HOUSING DEVELOPMENT SUMMARY FORM

County Mental Health Department: San Bernardino Department of Behavioral Health

Name of Development: Phoenix Apartments

Site Address: 1368-1376 Wall Avenue

City: San Bernardino State: CA Zip: 92404

Development Sponsor: Housing Partners I

Development Developer: Housing Partners I, a California Nonprofit Corporation

Primary Service Provider: One Stop TAY Center

New Construction Acquisition/Rehabilitation of an existing structure

Type of Building: Apartment Building Single Family Home
 Condominium Other

Total Development		MHSA Funds	
Total Number of Units:	9 (bedrooms)	Total Number of MHSA Units:	9 (bedrooms)
Total Cost of Development:	\$ 1,012,374	Amount of MHSA Funds Requested:	\$ 1,012,374
		Capital:	\$ 1,012,374
		Capitalized Operating Subsidies:	0

Other Rental Subsidy Sources (if applicable): 9 Shelter Plus Care Vouchers

Target Population (please check all that apply):

Adults Transition-Age Youth Older Adults

County Contact

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

Agency or Department Address: 900 E. Gilbert St., Cottage 4, San Bernardino, CA 92415

Agency or Department Phone: 909-387-8619

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

TAY Supportive Services Chart

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

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

MHSA Housing Program Rental Housing Application

ATTACHMENT C

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

Primary Service Provider:	<i>One Stop TAY Clinic (OSTC)</i>
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(Indicate the primary service provider, i.e., entity responsible for providing services to the tenants of the MHSA Housing Program units, and for overall implementation of the Supportive Services Plan, including coordination between multiple service providers where applicable.)

**Section D: Supportive Services Plan
Instructions**

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

Item D.1 Development Summary Form (Attachment B)

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

Item D.2 Development Description

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

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

Response:

1. The proposed housing development has not been named as of the date of this posting. The project is currently being referred to as the "Phoenix Apartments" project. The property address is as follows:
1368-1376 Wall Avenue, San Bernardino, CA 92404.

2. Housing and Service Goals

Housing Partners I, Inc. (HPI) proposes to develop affordable, supportive housing in San Bernardino, CA. The proposed "Phoenix Apartments" project will entail the acquisition and rehabilitation of a property that is within 1 mile of the San Bernardino Gilbert Street One-Stop TAY Center. The property, located at 1368-1376 Wall Avenue is 5,533 square feet and is improved with three 2-story structures encompassing 7 apartment units (five 1-bedroom, one 2-bedroom and one 3-bedroom). HPI proposes to reconfigure the 3-bedroom unit to create a community and service space for the TAY residents. A physical needs assessment has confirmed the need for moderate rehabilitation of the structures. Though the properties are in relatively poor condition, they are habitable and approximately 80% occupied. Once financing is secured and the relocation of the existing tenants is complete, the buildings will be substantially rehabilitated in order to transform the Phoenix apartments into a community asset once again. Project amenities will include covered and secured parking, a community room with bathroom, and live-in manager's unit.

The goal of the development is to provide mentally ill, transitional age youth in the San Bernardino community with permanent, affordable housing and a program of services that will help them maintain housing and reintegrate into mainstream society. The project will be staffed by a full-time property manager living on-site. The Department of Behavioral Health (DBH) will serve as the primary mental health service provider for the project. A case manager from the San Bernardino Gilbert Street One-Stop TAY Center will be able to use the site's community room to provide mental health and case management services.

3. Characteristics of Tenants to be Served

Of the overall 9 bedrooms at the site, 8 will be reserved for individuals that meet the San

Bernardino County MHTA Housing Program target population. The remaining bedroom will be reserved for an onsite manager.

4. Type of Housing to be Provided

The Phoenix Apartments project will consist of the acquisition and rehabilitation of an apartment complex on two separate contiguous parcels comprised of one and two-story apartment buildings. The buildings have wood frame construction with a mix of stucco and wood siding finish. Unit layouts are simple and efficient in design, ranging from approximately 350 to 500 SF, with 7 of the 9 units including a private bathroom and full kitchen, while a 2 bedroom unit provides private bathrooms for each bedroom with a shared kitchen. The building amenities will include a community multi-purpose room and 7 covered parking spaces. The location of the proposed project is ideal, as it is in proximity to public transportation, public services, grocery stores, retail, schools and most importantly, the One-Stop TAY Center.

5. Service needs of Target Population

The project's target population is mentally ill transitional age youth (TAY), who historically have not had access to appropriate services, and are inappropriately served or underserved. This is also a group likely to have numerous barriers to employment, including difficulty learning new skills due to a lack of education and unemployment. They are also more likely to face challenges maintaining housing due to several factors including: difficulty in keeping their units clean, failure to pay rent, and possessing various forms of mental illness that compromise their ability to live independently. Specific efforts are being made to reach the targeted ethnic groups of Latino and African American Youth who are over-represented in the justice system and out-of-home placements (Foster Care, Group Homes, and institutions). Phoenix Apartments will meet the unique needs of the TAY population by providing mental health services and connecting tenants to the full range of support services they need to gain increased independence and remain stably housed, including a safe and secure housing environment as well as linkages to health and dental care, life skills workshops, substance abuse treatment, and self help groups.

HPI will provide affordable, subsidized permanent housing for the tenants, while DBH through the One-Stop TAY Center will provide a program of mental health and other supportive services necessary to ensure the tenants' continued success at remaining housed. In addition, the One-Stop TAY Center is ideally located (within walking distance) to provide tenants with direct access or linkages to health and dental care services, alcohol and substance abuse counseling, continuing education and job training courses, life skills, and cooking and nutrition classes.

6. Project Team

As the sole member of the project sponsor, Housing Partners I, Inc. will act as the developer for the Phoenix Apartments. DBH, through the Gilbert Street One-Stop TAY Center will serve as the lead service provider. The Center is located less than 1 mile from the site. A case manager at the TAY Center office will be able to use the site's community room to provide mental health and case management services. Furthermore, the TAY tenants will also be able to use the One-Stop TAY Center to receive individualized services in a quiet and private setting as needed. Beacon Property Management Company will provide property management

services for the project.

7. Project Financing and Schedule

The acquisition and rehabilitation of the Phoenix Apartments is anticipated to result in a total development cost of \$1,012,374. In order to fund the project, the development team will utilize a Loan of \$ 952,374 from the Housing Authority of the County of San Bernardino (HACSB) which will serve as the acquisition financing, as well as the subsequent construction financing for the rehabilitation work. Additionally, HPI and HACSB has teamed with the City of San Bernardino Redevelopment Agency (SBRDA), who has provided a loan of \$60,000 to fund the pre-development and due-diligence work necessary to submit the MHPA application. Lastly, should cost overruns occur, HPI is willing to defer developer fees and other expenses in order to implement and complete the project. Once the development team has obtained an MHPA commitment, it will use the MHPA loan proceeds to pay down the HACSB and SBRDA loans for the permanent phase of the financing. The MHPA capital subsidy loan will be in the amount of \$1,012,374. With regard to operations, HACSB in collaboration with the County of San Bernardino (DBH) has submitted a grant application for Project Based Shelter Plus Care Vouchers in order to subsidize the operation of the 9 MHPA units at the project. If the County does not receive the vouchers, HACSB has the ability to provide project-based vouchers from its' regular allocation of tenant-based HUD housing Choice vouchers. Construction is anticipated to start in July 2011 and be completed by September, 2011.

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

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

Response:

The County of San Bernardino Department of Behavioral Health (DBH), through the Fiscal Year 2009-10 Annual Update to the Three Year Program and Expenditure Plan for MHTA Community Services and Support (CSS), identified a need for permanent supportive housing for Transition Age Youth with Serious Mental Illness (SMI) who are homeless or at risk of being homeless and are underserved. Additionally, the County's original MHTA Three Year Program and Expenditure Plan (for Fiscal Years 2005-09), 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 Transition Age Youth, who are homeless or in danger of homelessness, was ranked first among the top six issues identified by community workgroups for this age group. The County of San Bernardino MHTA Housing Program is expected to generate approximately 150 Supportive Housing units across all the age categories served. The MHTA Housing Program proposal for the Phoenix Apartments project directly responds to this identified community need and County priority by directly serving the Transition Age Youth population with SMI who are homeless or at risk of homelessness.

Phoenix Apartments Project Responds to Identified Need for TAY Housing

Partnering with One Stop TAY Center (OSTC) as the Full Service Provider (FSP) for MHTA specific resident services, the Phoenix Apartments project is requesting MHTA capital and operating subsidy funding for the Phoenix Apartments project. The Phoenix Apartments project will provide eight (8) units of permanent supportive housing for eight (8) MHTA-eligible Transition-aged Youth clients within the nine (9) unit development. Phoenix Apartments will collaborate with the Department of Behavioral Health (DBH) and OSTC, to provide voluntary supportive services to these eight (8) MHTA-funded units. DBH, through OSTC will support the clients in these eight (8) 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 Phoenix Apartments project are detailed in sections D.7 and D.8 of this notice.

Item D.4 Description of Target Population to be Served

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

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

Response:

The Phoenix Apartments project will provide 8 units of permanent supportive housing for Transition Age Youth (ages 18-25), one of the identified Mental Health Services Act (MHSAs) target populations under the County of San Bernardino MHSAs Housing plan. TAY served in the MHSAs Housing Program at the San Bernardino TAY project will be age 18-25 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 be frequent users of emergency room services for psychiatric services. TAY in the program will be of very low income with an annual income not to exceed 50% of Area Median Income (AMI), and many TAY may have incomes considerably less than 30% AMI. At the time of entrance into the housing, it is anticipated that many of the TAY may have no income other than SSI.

Item D.5 Tenant Eligibility Certification

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

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

Response:

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

Application Process:

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

- 1) Potentially eligible consumers will have the option of entering the Full Service Partnership (FSP) or being certified as eligible for MHPA housing by the FSP. Potentially eligible consumers may be directed to the FSP through a variety of sources such as 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 MHPA Housing once they have been certified as MHPA eligible. Property management screening for housing will be conducted by the housing provider, and will be separate from eligibility determination for MHPA services.

The criteria for eligibility under the MHPA Housing Program are (1) being homeless or at risk of homelessness and (2) meeting San Bernardino County's 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 MHPA programs for homelessness and at-risk of homelessness as well as mental health disability. Those clients who are FSP enrolled/eligible will be certified by the FSP, and verification of homelessness, at-risk of homelessness, and mental health disability will be documented following processes and procedures outlined in Department of Behavioral

Health Standard Practice Manual.

SBDBH and its contractors will use culturally competent efforts to outreach to and engage members of the target population, including those among unserved or underserved ethnic communities and other minority populations, and will utilize a variety of proven outreach strategies to recruit consumers for FSP enrollment. In addition to soliciting applications from individuals reached through direct outreach methods, the SBDBH MHPA 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 MHPA Program for certification of eligibility.

Notification:

All applicants shall be notified in writing by the FSP of a decision regarding their eligibility within a reasonable time from the date the complete Application for Certification was received by the FSP. If the certification is denied because the consumer did not meet the MHPA criteria as evaluated by the Full Service Partnership, the referring party and the prospective tenant will be notified in writing 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.

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

Item D.6 Tenant Selection Plan

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

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

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

Response:

Phoenix Apartments will designate eight (8) units of permanent supportive housing for 8 MHSA-eligible Transitioned age Youth clients within the 9 unit development. The rent on the units will be limited to the greater of 30% of SSI or 30% of actual tenant income, up to a maximum of 50% of AMI. The property will have a separate case manager office where MHSA tenants can receive the necessary mental health and case management services they need in a quiet and private setting along. MHSA tenants will also have access to the amenities at the Sepulveda-Wall apartments, such as a community meeting room and covered parking spaces.

Beacon Property Management will act as property manager on behalf of Housing Partners I (HPI) for the Phoenix Apartments. Beacon Property Management was incorporated in July 2000 and manages over 85 properties encompassing over 7000 units. Included in Beacons portfolio is the Villages at Cabrillo which provides affordable rental housing for homeless veterans, many of which struggle with mental illness or substance abuse issues. Beacon has experience providing quality property management for both affordable housing and supportive housing projects in collaboration with Housing Partners I in the County of San Bernardino.

Notification of Unit Availability

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

1. Beacon Property Management, the property manager, will coordinate with the San Bernardino Department of Behavioral Health (DBH) Housing Program and the One Stop TAY Center (OSTC) to fill vacancies in MHSA units with applicants that meet the MHSA criteria and are enrolled in or eligible for the TAY-FSP Program.
2. Prospective tenants apply for tenancy at Phoenix apartments after being referred by

DBH Housing Program. The prospective tenant, if not referred by DBH Housing Program, will be directed to the OSTC for certification of eligibility for MHPA housing. DBH Housing Program will provide confirmation of MHPA housing unit eligibility to the applicant and Beacon if the applicant meets the MHPA Housing Program criteria.

3. Phoenix Apartments will maintain a site specific wait list, keeping it current by contacting the prospective tenant/DBH on a regular basis, per the Phoenix property management plan, to inquire about their continued interest in an MHPA funded unit.

Rental Application and Wait List Procedure

At initial lease-up and thereafter, DBH Housing Program will refer enrolled or eligible FSP clients to the Phoenix Apartments to apply for MHPA 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 eligibility application with the DBH. This application 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 eligibility application will collect information about the applicant, including, name and contact information, household composition and income. It will also be verified by DBH that they meet program eligibility criteria prior to being referred to the Phoenix Apartments. 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 MHPA Housing Program units. DBH will provide training for the OSTC case manager on the pre-qualification and application process.

Following initial lease-up, those applicants who pre-qualify will be provided 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, Beacon will provide the wait list status for prospective tenants to DBH Housing Program and OSTC. Reasonable accommodation, such as alternative means of receiving or submitting applications, will be made for persons with disabilities. Beacon and DBH Housing Program will work together to determine the types of accommodations that may be helpful to ensure MHPA-eligible applicants are able to access the MHPA designated units.

Project Waiting List

Phoenix Apartments screening protocol is outlined in section C.2 of the MHPA 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 Beacons Phoenix waiting list, upon favorable pre-qualification. Favorable pre-qualification does not assure, nor imply, that an application will be approved or that Beacon is preparing a particular application for a unit that may be available. Additional tenant selection criteria, as outlined in the tenant selection plan, shall also apply.

Applicant Interview and Screening

When there is a vacant MHPA Housing Program unit, the property manager will contact the

next eligible applicant on the wait list to schedule an interview time. If requested by the applicant, interviews will be scheduled to allow for a case manager from OSTC or a DBH Housing Staff member to be present in order to assist the applicant. 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 may be utilized by Project Manager for 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. Property Management staff will perform property management case note documentation of applicant for tenant behavior and appropriateness.
 2. Tenant behaviors that may affect 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. Property management staff will evaluate these behaviors on a case by case basis and provide for reasonable accommodation whenever possible.
- d. An interview with the potential tenant is conducted.
- e. A move-in date is scheduled.

Property Management Screening

The MHSa FSP enrolled/eligible applicant will be screened by Beacon and is expected to include review of the completed Beacon Property Management housing application.

Verification of MHSa eligibility from DBH Housing Program will occur as the first step in the screen process. Applicants who successfully pass this MHSa eligibility 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, Beacon will work with the applicant to obtain a specific available unit. Beacon, DBH Housing Program, and OSTC will work together 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

Either DBH Housing Program or OSTC, will provide all necessary support during the screening process, including, if desired by the applicant: assisting the applicant with completing the required paperwork, securing required documentation, and accompanying the applicant during interviews with Beacon staff. At applicant's request, Beacon will copy or include the appropriate OSTC staff on all communication relevant to applicant's application process.

References

If landlord references are not available, personal references, other than family members, will be requested. Requested references can be provided by staff of a homeless shelter, other homeless service providers, social workers or others involved with the applicant in a professional capacity, together with as much information as possible about where the applicant has been living for the past five years. Landlord, personal, or other references must indicate the ability to care for the property and pay rent on time, as well as the ability to 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

Property management staff will evaluate landlord references on a case by case basis and provide for reasonable accommodation whenever possible.

Tenant Eligibility Criteria

In order to be eligible for tenancy in one of the eight (8) MHSA set-aside units at Phoenix Apartments, prospective MHSA tenants must meet the following eligibility criteria:

- Must be an adult (age 18 to 25) with diagnosis of serious mental illness (SMI)
- Must be homeless or at risk of homelessness
- Must be eligible and/or enrolled in the FSP program

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

Beacon 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 DBH and OSTC

Notice of Decision

Beacon 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 Beacon 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 DBH Housing Program. In the event of successful application for housing, OSTC will be available to assist the tenant in making arrangements for and completing the move-in process.

Fair Housing

Beacon 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. Beacon 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.

Beacon 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.

Beacon 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. Beacon 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. Beacon will work closely with legal counsel and regulatory agencies throughout the marketing and outreach process to ensure full compliance with all applicable requirements.

Appeals Process

If a rental application is denied, Beacon will send the applicant a letter of denial, which will specify the reason for the denial. In order to ensure seamless communication with OSTC, a copy of the denial letter will be mailed to the applicant's case worker at OSTC and to the DBH Housing Program. The applicant has fourteen (14) calendar days after the date of the denial letter to submit a written appeal to Beacon.

Beacon 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, Beacon will close the file permanently.

Beacon 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. A copy of the decision letter will be mailed to OSTC and the DBH at the same time it is mailed to applicant.

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.

Item D.7 Supportive Services Plan

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

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

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

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

Response:

The One Stop TAY Center (OSTC) is a Full Service Partnership operated by the County of San Bernardino Department of Behavioral Health to address the identified service needs of TAY (Transition Age Youth) with serious mental illness. It is the primary objective of the One Stop TAY Center to support the individual in maintaining tenancy. The overarching principles of the MHSa housing service plan are client/tenant choice and voluntary services. The supportive services program will assist TAY resident consumers to maintain self-sufficiency, succeed in their wellness, reduce hospitalizations, reduce incarcerations, reduce homelessness, increase employment, and successfully re-integrate into the community.

Service Needs of the Target Population

The target population for this project consists of eight (8) TAY, age 18-25 who have been diagnosed with a serious mental illness and who are homeless or at risk of homelessness. The One Stop TAY Center has developed a comprehensive plan consisting of case management, assessment, psychiatric care, and 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, and reduce incarcerations, decrease homeless days, and increase housing stability while successfully re-integrating into the community. While the specific level of care of each tenant will be dependent on that tenant's need and desire for services, OSTC has tailored a plan that can be both flexible and comprehensive to address all needs as they arise.

Service Provider Staffing

OSTC 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, OSTC's service plan calls for flexibility in staffing to maximize how and when services are provided. It is OSTC's intention to have at least one staff member on site at the development as needed, and OSTC may provide additional staff on an as-needed basis to fulfill the goals of the program. As a Full Service Partnership, OSTC will utilize a staffing model that responds to the needs of the population by including an array of staff and a multi-disciplinary approach, along with a 24/7 service capability. The OSTC team will utilize staff reflecting the ethnic and cultural make-up of the resident consumers. Overall, OSTC 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 8 TAY tenants. Tenants will also be able to be seen privately at the office space set aside for OSTC clinicians at the Phoenix Apartments, in the tenant's individual residence, or at the One Stop TAY Clinic approximately ½ mile from the site.

Overview and Description of Services

The OSTC 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, employment assistance and peer and family support. The services and goals will be developed in partnership with the tenant and will be directed towards utilizing a strengths-based approach. Services will be directed towards supporting the OSTC consumer in maintaining long-term housing. OSTC will provide targeted services that directly address the unique needs of each tenant. Supportive services staff will also assist the OSTC consumer 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
- TAY specific Parenting Support & Development
- TAY specific Anger Management groups
- TAY specific Medication Management groups
- TAY specific Community Enrichment & Social Activities
- TAY specific Independent Living groups
- Local CBO & Faith based community linkage

OSTC will provide all direct mental health maintenance and case management services. All psychiatric services and medications will be provided by the San Bernardino TAY Clinic. The 8 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 tenant's case will be reviewed to discuss issues of treatment and progress. The multi-disciplinary team will provide on-going assistance with independent living skills, individual 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. All members of the service team

become familiar with all the 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 Phoenix Apartments although other county facilities and programs may be used as dictated by program and consumer needs.

Promoting Recovery, Work and Self-Sufficiency

The OSTC consumers 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 Phoenix Apartments will consist of 8 designated MHSAs units out of a total of 9 planned units. The property will be 100% MHSAs with the exception of the manager's unit. Nearby amenities include restaurants, a medical clinic, shopping, a market, and a pharmacy. Transportation is easily accessible through San Bernardino bus system. Phoenix Apartments will also offer a range of amenities including a community laundry, and covered

parking spaces. 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 TAY Program Manager or designee is expected to be the primary point of contact between OSTC and Beacon Property Management. OSTC 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. OSTC staff 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 OSTC and the property manager, which will lead to optimal housing outcomes for tenants and take advantage of the resources that are available.

Item D.8 Supportive Services Chart (Attachment C)

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

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

Describe the following:

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

Response:Physical Description of the Development

The Phoenix Apartments project is located at 1368-1376 Wall Avenue, San Bernardino, CA 92404, just northwest of the intersection of Baseline and Waterman Avenue, a major intersection in the city. The property is situated on 2 separate but contiguous parcels. The one and two-story apartment complex currently comprises a total of seven apartment units. The sites can be accessed by a driveway connected to Wall Avenue. The site is improved with three structures encompassing 7 apartment units (five 1-bedroom, one 2-bedroom, and one 3-bedroom), with seven covered parking spaces.

The project will be substantially rehabilitated, which is anticipated to include the following work:

- Roof Replacement with minimum 20 year warranty roof
- Window/door replacement or repair
- Replacement of kitchens & bathrooms
- Replace Refrigerators
- Replacement of existing HVAC system
- Replacement/repair of electrical system
- Replacement/repair of plumbing pipes and fixtures
- Repair of concrete cracking at driveways
- Concrete repair of common areas/walks
- Replacement of rotted, termite damaged wood
- Termite Treatment
- Improved Landscaping & Irrigation
- ACM/LBP Remediation
- Lath/Plaster/Drywall/Flooring replacement or repair
- Painting/Decorating- Interior, exterior
- ADA accessibility requirements for adaptability as necessary
- Addition of 1 bathroom at 2 bedroom unit
- Creating a manager unit and community multi-purpose room with bathroom within existing 3 bedroom unit

Unit layouts are simple and efficient in design, ranging from approximately 350 to 500 square

feet. 7 of the 8 eventual units will include a private bathroom and full kitchen, with a 2 bedroom unit providing private baths at each bedroom with a shared kitchen. After the project is rehabilitated amenities will include a community multi-purpose room, live-in manager's unit, and seven covered parking spaces. Additional uncovered parking is also available onsite. Landscaped area comprises approximately 20% of the site and includes several mature trees and bushes, grass covered expanses, and planters outlining portions of the buildings. There are individual, secured patios and/or balconies associated with most of the units. The property is ideally located in central San Bernardino, approximately 2 blocks north of Baseline Street, where there exist many important amenities, including Stater Brothers Supermarket, Walgreens Pharmacy, the State of California Department of Motor Vehicles office, as well as a plethora of retail, restaurant and fast-food service establishments. The St. Bernadines Medical Center is located within a mile north of the site, as is the YMCA recreational facility, and the County of San Bernardino's Department of Behavioral Health One-Stop TAY Center is within one mile east of the site. Also within a mile is Pacific High School, 2 elementary schools, and a SB Unified School District Adult School facility. A major bus stop is located at the intersection of Baseline and Waterman, providing access to all of the local bus lines, as well as the future downtown Express bus line which will connect San Bernardino State University to the North of the City with Loma Linda University to the South.

Spaces for Delivery of Supportive Services

Dedicated supportive service space at the Phoenix Apartments will consist of a multi-purpose community room which will be created through the reconfiguration of the existing 3 bedroom unit at the site. The resident property manager will be housed on the second floor of that unit. The community room will facilitate larger meetings and also be able to be locked off so that TAY tenants can receive the necessary mental health and supportive services they need in a quiet and private setting. In addition, the One-Stop TAY Center Case Managers and all other service provider partners will be free to use the multi-purpose space to render services.

Alternatively, the 8 TAY permanent supportive housing units will be large enough to accommodate the provision of mental health and supportive services, so the tenants can be met and served in their units if they wish. In addition to the onsite service space, the Gilbert Street One-Stop TAY Center is located within 1 mile of the site. The TAY tenants will be able to use this facility to receive services in a quiet and private setting, as well as take advantage of a variety of life-skills, employment, education, etc. services that are offered there.

Features for Physically Disabled Participants of the MHSAs Housing Program

All of the common spaces in the development will be accessible to physically disabled persons including access controls, door widths, turning radius within rooms, lighting controls, emergency signals, ramps and floor slopes.

All ground floor units will be minimally accessible for physically disabled using wheelchairs and mobility devices of sizes anticipated within California Building Code standards. The owner and management agent of the Phoenix Apartments are prepared to meet the

reasonable accommodation requests of residents and potential residents to modify the equipment and features of the rental units (excluding the room dimensions and/or wall locations) in order to better meet the unique needs of physically disabled residents.