4.2.1. PROJECT OVERVIEW

Housing Consortium of the East Bay (HCEB) in partnership with Hallmark Community Solutions (HCS) proposes the development of 3-4 supported independent living homes in the unincorporated area of Ashland in Alameda County. HCEB will own and operate these properties as permanent, affordable, accessible housing. The units will remain affordable for a minimum period of 55 years. Bay Area Community Services (BACS) will be the primary service provider for the tenants living in these newly created homes. Each home will contain 3-4 private bedrooms with one tenant living in each bedroom. Tenants will share common living space including the kitchen and bathrooms. The housing will be targeted to adults, 18 years and older, with serious mental health issues that are homeless or at-risk of homelessness. Individuals accepted into the property must have incomes at or below 50% of area median income with a preference given to those with incomes at or below 30% of area median. Tenants will pay a monthly rent of 30% of the current SSI/SSP grant amount for a single individual living independently, or 30% of total household income, whichever is higher.

The homes will be developed using a combination of federal Neighborhood Stabilization Program and HOME funds in conjunction with Mental Health Services Act (MHSA) funding. The exact number of properties that will become part of this overall project will depend on the availability and acquisition prices of properties eligible for the Neighborhood Stabilization Program (NSP). NSP funding is available for the acquisition and rehabilitation of properties in publicly designated neighborhoods. MHSA funds will be utilized to cover capital and operating costs associated with the overall project. Project operating dollars will be utilized to fund a full-time housing service coordinator position within BACS that will be the primary service coordinator for tenants living in the homes.

The overall project will utilize a shared housing model designed to offer housing opportunities for individuals seeking housing that offers some privacy in a shared living environment with building-linked supportive services. Tenants will receive services through a full-time housing service coordinator that will provide services to all of the properties in this project. The service coordinator will be an employee of Bay Area Community Services (BACS) and will be part of the BACS mental health service teams. The service coordinator will coordinate services with external behavioral health and other health care providers, facilitate house meetings, coordinate educational and community building events, mediate conflicts among tenants, and help to address any issues that may jeopardize a tenant's housing. As needed, tenants at the sites will also be linked with a designated, external case manager or personal service coordinator. Core services that tenants will be supported in accessing include primary care, psychiatric care, Wellness Recovery Action Planning (WRAP), peer and family support services, trauma-informed services, benefits advocacy, and payee services. BACS will provide 24 hour, 7 days per week on-call coverage for service-related issues that arise at the site.

The on-site housing service coordinator will meet on a regular basis with the property manager to address concerns related to property maintenance, tenancy, and community activities and

events. BHCS, the Owner, and BACS will work together to do "whatever-it-takes" to support tenants in maintaining their housing, improving their health, and pursuing their personal goals. Supportive services will be voluntary and client-centered and will focus on the development of personal goal plans that address needs and utilize strengths. Supportive services will maintain a strict separation from property management in order to ensure tenant confidentiality.

The proposed shared housing model has many similarities to programs that involve tenants living in their own rental apartment units. Tenants are responsible for their own lease and they have separate, lockable units. Common areas including the kitchen will have individual, lockable, storage units for tenants to secure personal items. Mini refrigerators will be available in each unit so tenants can store food items they prefer not to store in a shared refrigerator. Landscaping and design will be focused on creating spaces for private gatherings for tenants and their guests while also creating places for community activities. The proposed shared housing approach has the following benefits:

- Reduces the housing costs of individual householders, thereby increasing disposable income for other basic needs;
- Integrates residents into small-scale residential communities;
- Is part of a strategy for community stabilization by making more efficient use of the existing stock without requiring major design changes;
- Reduces isolation and provides opportunities for companionship and socialization for the home sharers;
- Provides residents an opportunity to make policy decisions and manage the day-to-day operations of their home. They decide rules about pets, guests, smoking, etc. and often buy food, as well as cook and eat together;
- Is flexible as a model and adaptable to a variety of populations.

Each property and its tenants will develop a collaborative "Home Sharing Agreement." This agreement is different from House Rules which will be established by the Property Manager. The Home Sharing Agreement will be an evolving document that articulates how the members of the home want to live together. The Agreement will address issues related to sharing space, resolving conflicts, household chores, and other areas. Each house will have a regular house meeting with the Housing Service Coordinator present, where the Home Sharing Agreements will be developed and will evolve over time. All matters affecting the household are addressed at the meetings, as well as any conflicts between members of the house.

Budget Summary

It is currently anticipated that the development cost for each single-family home will be $450,000, which assumes a purchase price of $275,000 maximum for a 3- to 4-bedroom home in decent condition. The estimated MHSA request will be $87,500 to $100,000 per bedroom. Other sources of acquisition, development and permanent financing include a Neighborhood Stabilization Program grant and an Alameda County HOME permanent loan. It is also anticipated that the MHSA capitalized operating subsidy, providing subsidy for 20 years, will be just under $100,000 per bedroom.

D1. CONSISTENCY WITH THREE-YEAR PROGRAM & EXPENDITURE PLAN

Alameda County Behavior Health Care Services ("BHCS") identified housing as a critical issue for its target populations prior to the passage of the Mental Health Services Act (MHSA). BHCS partnered with other county departments and cities to create the Alameda Countywide Homeless and Special Needs Housing Plan, referred hereafter as "the Housing Plan", a county-wide housing and services plan that addresses significant unmet needs contributing to homelessness and housing instability. The plan, officially released in April 2006, seeks to end homelessness in Alameda County by 2020 through the creation of 15,000 new affordable housing opportunities linked with appropriate supportive services for extremely low-income households living with special needs and households with histories of homelessness and housing instability. BHCS co-sponsors EveryOne Home, a non-profit organization specifically created to oversee the implementation of the Housing Plan.

The Ashland Neighborhood Stabilization Program ("the Project") meets the objectives outlined in Section H of the Housing Plan by using existing resources to increase and sustain the amount of housing for the targeted populations, advocating to maintain and increase the resources necessary to develop, operate, and preserve appropriate and affordable housing options, and expanding housing models to support fully independent affordable housing with supportive housing services.

The BHCS MHSA Community Service and Supports (CSS) planning process reinforced findings outlined in the Housing Plan. The planning process highlighted that, across age groups and geographic regions of Alameda County, a key barrier to the promotion of wellness and recovery is a lack of high quality affordable housing with appropriately linked supportive services. Alameda County's CSS plan included the creation of a Housing Services Office, the creation of six Full Service Partnership (FSP) wraparound service programs targeted at addressing homelessness and housing stability, and funding to create innovative housing programs including a housing assistance loan program. The proposed Project supports CSS planning goals of reducing homelessness and expanding permanent supportive housing.

D2. DESCRIPTION OF TARGET POPULATION TO BE SERVED

The Project will serve adults (18 and older) with serious mental health issues that are homeless or at-risk of homelessness. Maximum MHSA and Ashland NSP program income restrictions for the housing units will be ≤ 50% AMI (Area Median Income), with an Owner preference for those whose income is at or below 30% AMI. Note that in Alameda County, the current annual income of 50% AMI for a single individual is $31,250; this income equals $18,750 for those at 30% AMI.

All housing units will be fully subsidized through MHSA Capitalized Operating Reserves so that the units are affordable to individuals living on Supplemental Security Income (SSI). Units at the property will be targeted to individuals that are certified as MHSA-eligible by the BHCS Housing Services Office. Eligibility criteria is based on statewide MHSA Housing Program guidelines which stipulate that eligible households are homeless or at-risk of homelessness and include at least one member with a serious mental health issue. Current FSP clients will be eligible for the newly created housing units.

D3. TENANT SELECTION PLAN

Determining MHSA Eligibility

BHCS shall be responsible for determining if an applicant for an MHSA Unit meets MHSA Eligibility requirements as defined by the California Department of Mental Health. MHSA-Eligibility Certification and appeals of denial for Certification will take place in accordance with established certification policies and procedures. In the event an applicant who has not been certified as MHSA-Eligible expresses an interest in an MHSA Unit at the Project, the Owner shall refer such applicant to BHCS for assistance in determining MHSA Eligibility.

MHSA Eligibility Certification Process

BHCS shall establish a tenant certification process that is consistent with guidelines established by the California Department of Mental Health and California Housing Finance Agency MHSA Housing Program, or if such Program is no longer in existence, then in accordance with comparable guidelines established by BHCS. The process shall include, but is not limited to, verification of a serious mental health issue and an individual's housing status of homeless or at-risk of homelessness.

As part of the certification process and during the course of a certified tenant's residency at the Project, BHCS will ensure that applicants have linkages with appropriate and desired BHCS-designated service providers.

Wait List

Because the MHSA Eligibility Certification Process requires verification of an individual's current housing status of homeless or at-risk of homelessness and this Certification is only valid for a limited period of time, a Wait List is not appropriate for this Project.

Tenant Selection Process- Initial Lease-Up

Marketing/ Outreach: At least ninety (90) days prior to the date that the Owner intends for any tenant to move into the Project, the Owner will communicate specific information regarding the availability and features of the units, including the anticipated date of availability & other critical dates, location, eligibility criteria, accessibility, and other information critical to people with disabilities. BHCS will market the units and provide MHSA-Eligibility Certification applications to potential tenants, service-providers, community organizations, and other entities with potential applicants. Special outreach activities will be undertaken to reach persons and groups who are not likely to apply for the housing without special outreach efforts. The Owner and BACS will assist in marketing efforts.

MHSA-Eligibility Certification: At least sixty (60) days prior to the projected initial move-in date, applicants will submit a Certification Request to BHCS, who will provide certification within (10) working days of receiving the request from the applicant and will notify the applicant about the status of their certification. During initial lease-up, the expiration on an individual's Certification of MHSA-Eligibility is 90 days to acceptance into the unit.

Lottery Process:

1. As each applicant becomes certified for MHSA-eligibility and the Property Manager is notified of their status, the Property Manager will collect the contact information of the applicant and will assign each an application number.
2. Forty-five (45) days prior to the projected initial move-in date, the MHSA- Eligibility Certification period will end. The Property Manager will select application numbers at random, and assign

each application number a lottery number, based on the order in which the application number was chosen. All applicants will be notified of their lottery number by the Property Manager, who will be responsible for the application process and application assistance coordination with the Housing Service Coordinator.

3. The Property Manager will contact applicants in the order of their lottery number to initiate the "Orientation & Initial Application" phase.
4. For applicants who submit their MHSA-eligibility status to the Property Manager *after* the initial application submittal period has ended, the Property Manager will follow the guidelines as described in the Tenant Selection Process: Ongoing Tenancy.

Orientation & Initial Application: At least thirty (30) days prior to the projected initial move-in date, the Property Manager will attempt to contact all of the applicants by mail and phone to announce the date of a public open house and set up an individual applicant orientation, in order to provide the applicant with an opportunity to learn about the shared-housing program, the property and the neighborhood. Neither the open house nor orientation will be mandatory. The Property Manager will also speak to the applicant's service provider(s) if the applicant has consented to share information with the Property Manager. For applicants who do not have a Service Provider, the Housing Service Coordinator will assist them throughout the application process and in completing the application forms if necessary.

The following information will be collected as part of the application process:

- Rental Application
- MHSA Eligibility Certification from BHCS Housing Services Office (which includes verification of serious mental health issues and current housing status)
- Income Verification and associated rental calculation worksheet
- Credit & Tenant History
- Criminal Background Check
- Copy of some form of identification, such as:
  - ✓ California Driver's License
  - ✓ Social Security ID Card
  - ✓ Valid Passport
  - ✓ VA Card
  - ✓ Military ID Card with photograph

The Property Manager will review the information and complete an application checklist to confirm a complete application. Incomplete files will be returned to the appropriate contact.

Income Verification & Interview: Once a complete application has been submitted, the Property Manager shall conduct a criminal background check and complete the Income Verification check to determine if the applicant's income is below the income limit required at that time. If the income is higher than the required limit, the applicant must be passed over and the next eligible applicant must be reviewed.

If an applicant is within the income limit, the Property Manager will set up an appointment to interview and screen the applicant. The Property Manager reserves the right to conduct the orientation and screening during the same meeting. Case manager(s) and/ or other third-parties may escort applicants to meetings and appointments.

After the interview and screening process, the Property Manager will place the screening form into the applicant's file. The applicant will either be entered into a lottery for the available housing or be denied their application for housing. See next section for why an applicant will or can be denied housing.

Rejection of Ineligible or Unqualified Applicants: The Owner and Property Manager agree to comply with applicant rejection requirements set forth in Chapter 4 of the HUD Handbook 4350.3: Tenant Selection Plans. In addition, see "Fair Housing" section below for statement on fair housing compliance.

The following will result in automatic denial of housing**:**

1. Being required to register and/ or subject to restrictions by California Penal Code 290;

The following is a list of reasons an applicant *can* be denied housing for the particular unit available**:**

1. Failure to meet eligibility requirements for the housing program;
2. Failure to provide required documentation. Applicants who miss one or more scheduled appointments during the screening process will be denied (appointments can be re-scheduled due to documented good cause);
3. Behavior that is disruptive to the orientation or screening process. This includes threatening, abusive or violent behavior toward any employee of the Project. Serious or repeated behavior of this type may result in denial of the application.
4. Falsification of information by the applicant during the screening process;
5. Convictions for the following history of criminal activity:
   - Arson and/ or other destruction of property;
   - Manufacture and/ or distribution of illegal drugs;
   - Violence towards landlords, tenants or staff;
   - Crimes against at-risk persons, including seniors;
   - Other violent criminal activity
6. History of behaviors which have impacted the applicant's ability to retain housing or would affect the applicant's ability to live in the community. Examples include history of failure to pay rent and/ or abide by the lease terms or house rules;
7. An unusually high number of evictions (more than 2);
8. Applicants may also be denied a particular apartment unit if the household characteristics are not appropriate for the type of apartment unit available at that time.
   EXAMPLE: only an accessible apartment is available and the following is true:
   a. The applicant household does not include an individual requiring the features of the apartment, and;
   b. There are either tenants in the Project or applicants who desire such apartment and who require the features of the apartment;

Determination of Rejection: If the applicant is ineligible or denied, rejection shall be authorized. The Property Manager will notify the applicant in writing of the denial and explain in the notice:

1. The reasons for the denial;
2. The applicant has 14 days to respond in writing or to request a meeting to discuss the rejection;
3. The applicant may request the Property Manager to make reasonable accommodations in nonessential policies or practices to enable the applicant equal opportunity and to determine whether mitigating circumstances or reasonable accommodations would make it possible to house the applicant;
4. If the applicant appeals the rejection, the Property Manager must give the applicant a written final decision within 4 days of the response or meeting. The Property Manager will review the

appeal and initial application with the Housing Service Coordinator and Owner. Decisions will be made on a case-by-case basis.

5. The Property Manager must keep the following materials on file for at least 3 years:
   a. Application;
   b. Initial rejection notice;
   c. Any applicant reply;
   d. The final response;
   e. All interview and verified information on which the rejection was based.

Notification of Admission: Once an applicant has been selected for the available unit, the Property Manager will send an approval letter to the applicant, stating the next steps and that the Property Manager will contact the applicant when the unit is ready for occupancy and move-in. A meeting will be coordinated to review the Lease and the terms of Tenancy.

Tenant Selection Process- Ongoing Tenancy

Marketing/ Outreach: As soon as a unit is identified for upcoming vacancy, the Owner will communicate specific information regarding the availability and features of the unit, including the location, accessibility, eligibility criteria and other information critical to people with disabilities. BHCS will market the available unit to potential tenants, service-providers, community organizations, and other entities with potential applicants. Special outreach activities will be undertaken to reach persons and groups who are not likely to apply for the housing without special outreach efforts. The Owner and BACS will assist in marketing efforts.

MHSA-Eligibility Certification: Applicants will submit a Certification Request to BHCS, who will provide certification within (10) working days of receiving the request from the applicant and will notify the applicant about the status of their certification. BHCS will be responsible for the vacancy loss associated with delays caused by BHCS that result in certifications taking longer than 10 working days, and that are not agreed to between Owner and BHCS as reasonable causes for delay. MHSA Certifications are considered valid for a period of 30 days for purposes of filling vacant units.

Orientation & Initial Application: Once applicants have been certified as MHSA-eligible, BHCS will then forward contact information and certifications on applicants to the Property Manager, who will be responsible for the application process and coordinating with the Housing Service Coordinator.

The Property Manager will attempt to contact the applicant by mail and phone to set up an initial appointment for applicant orientation, which will include a home visit by the applicant with current tenants and the Housing Service Coordinator (if desired by applicant), in order to allow the applicant to learn from current tenants about the dynamics of the household, the property and the neighborhood. The Property Manager will also speak to the applicant's service provider(s) if the applicant has consented to share information with the Property Manager. For applicants who do not have a Service Provider, the Housing Service Coordinator will assist them throughout the application process and in completing the application forms.

The following information will be collected as part of the application process:

- Rental Application
- MHSA Eligibility Certification from BHCS Housing Services Office (which includes verification of serious mental health issues and current housing status)

- Income Verification and associated rental calculation worksheet
- Credit & Tenant History
- Criminal Background Check
- Copy of some form of identification, as outlined previously

The Property Manager will review the information and complete an application checklist to confirm a complete application. Incomplete files will be returned to the appropriate contact.

Income Verification & Interview: Once a complete application has been submitted, the Property Manager shall conduct a criminal background check and complete the Income Verification check to determine if the applicant's income is below the income limit required at that time. If the income is higher than the required limit, the applicant must be passed over and the next eligible applicant must be reviewed.

If an applicant is within the income limit, the Property Manager will set up an appointment to interview and screen the applicant, and to decide whether an applicant is an appropriate match for the available unit within the shared single-family household. The Property Manager reserves the right to conduct the orientation and screening during the same meeting. Case manager(s) and/ or other third-parties may escort applicants to meetings and appointments.

After the interview and screening process, the Property Manager will place the screening form into the applicant's file. The applicant will either be accepted or denied their application for housing into the unit.

Rejection of Ineligible or Unqualified Applicants: See 'Initial Lease-Up' for process.

Determination of Rejection: See 'Initial Lease-Up' for process.

Notification of Admission: See 'Initial Lease-Up' for process.

Move-In Procedures

Rent: Based on the MHSA Housing Program rent requirements for Projects using MHSA capitalized operating subsidy, rents must be set no lower than 30% of the current Supplemental Social Security Income/ State Supplemental Program (SSI/SSP) grant amount for a single individual living independently, or 30% of total tenant income, whichever is higher (up to 50% of area median income).

Unit Availability Letter: When the unit is ready, the Property Manager will send a letter informing the approved applicant of:

1. Approved unit address and location;
2. Move-in date and time;
3. Rent (both prorated rent due on move-in day and regular monthly amount);
4. Security Deposit;
5. Contact information for move-in assistance; and
6. Information regarding move-in procedures

Prior to Move-In

1. The applicant will sign the Lease and related documents;

2. The applicant and Property Manager will inspect the apartment, and both will sign the move-in inspection form;
3. The applicant or their responsible payee will pay the security deposit as stated below;
4. The applicant or their responsible payee will pay the rent for the first month of occupancy, as set forth in the Lease;
5. Payment of the security deposit and first month's rent must be by personal check, cashier's check or money order;
6. The applicant will be given a copy of the Lease, the Move-In Inspection Form, House Rules, current Home Sharing Agreement, 50059 "Tenants Rights and Responsibilities Brochure", other documents, and the receipt for the security deposit and first month's rent.

Additional Requirements of Occupancy: The following are requirements of occupancy and must be agreed to prior to execution of the Lease and move-in, and are on-going requirements of occupancy after move-in:

1. Tenants must maintain premises in a safe, sanitary condition;
2. Tenants must abide by the terms of the Lease, House Rules and Home Sharing Agreement;
3. Tenants will be required to participate in an annual unit inspection and income recertification, conducted by the Property Manager;
4. Tenants will be required to immediately report any changes in their household income to the Property Manager;
5. Falsifying income information is grounds for the collection of back-rent and/ or eviction;
6. Should a tenant's income exceed 50% AMI, the tenant will be given 6 months to move to other housing;
7. If a tenant is in a unit modified for the physically disabled (features specifically designed for persons with hearing, visual or mobility impairment) and the tenant is not in need of the modifications, the Property Manager has the right to move the tenant to a comparable unit within the Project, should the modified unit be required by a physically disabled tenant/ applicant. The Property Manager must give thirty (30) days notice.

Security Deposits

1. Tenants shall be required to make a refundable security deposit in accordance with applicable state and local laws. The deposit shall be equal to one month of the tenant's total rent. The security deposits shall be held in a separate trust account with a depository insured by an agency of the federal government or a comparable federal deposit insurance program. The balance of this account shall at all times equal or exceed the aggregate of all outstanding deposits, plus accrued interest.
2. When a thirty (30) day notice is received, the Property Manager will send the tenant a response stating the tenant's right, by State Law, to a Pre Move-Out Inspection. If the tenant requests this, this is an opportunity for the Owner to determine if there are damages to be corrected or cleaning necessary over and above normal wear and tear, which shall be charged against the security deposit. The tenant may, but is not be required, to participate in this inspection. If the tenant does not request a Pre Move-Out Inspection, the Property Manager will inspect the apartment prior to the tenant's move-out date to determine if there are damages to be corrected rather than waiting until the apartment is vacant. The move-out inspection form will be compared to the move-in inspection form to determine the extent of tenant caused damages.
3. Within 10 days from the date of move-out, a security deposit refund form will be completed, indicating:

A. Security deposit on hand;
B. Amount of rent or unpaid charges owing as of the date of the move-out;
C. Amount of damage or cleaning charges to be assessed. An itemized list of work and actual costs will be attached to the forms for repair, cleaning, or replacement of items above normal wear and tear. Replacement of items charged to the tenant is based on the life of the item and the amount of damage. The balance of the security deposit after deductions for outstanding rent, charges, cleaning and damages will be refunded to the tenant with this form and the itemization of costs within 21 days of the move out;

At Move-In: Move-in will occur only between the hours of 9:00a-5:00p Monday – Friday. At the agreed upon date/ time for move-in, keys to the apartment will be issued to the tenant, and an orientation with the Property Manager and Housing Service Coordinator will be held which will include a summary of the Lease requirements, House Rules, Home Sharing Agreement and any other information needed to assure that the new tenant will be comfortable and welcomed to his/her new residence.

If a tenant does not show up on the confirmed move-in date, a letter will be sent to the tenant and copied to the Housing Service Coordinator and the tenant's Service Provider (if applicable) stating that they have 72 hours to contact the Property Manager and request an extension reschedule. If the tenant does not contact the Property Manager within 72 hours, a denial letter will be sent. Regardless of circumstances, a tenant who has requested and been granted an extension for move-in must complete the move-in process within 14 days of a scheduled move-in date. If the tenant is not able to complete the process within this time, a denial letter will be sent.

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 on-going 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 Project Act of 1974), Executive Order 1 1063, 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 tenants, applicants, and staff.

This Project will not discriminate against prospective tenants on the basis of the fact or perception of their race, religion, creed, national origin, color, age (With the exception that the applicant must be 18 years or older, as required by the Project), sex, blindness, or other physical or mental disability, marital status, domestic partner status, ancestry, orientation, gender identity, HIV/AIDS, medical condition, height, weight, political affiliation or other consideration made unlawful by federal, state, or local laws.

The Project will not discriminate against prospective tenants 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 tenants have minor children. While the Project 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 Owner will work closely with legal counsel and regulatory agencies throughout the marketing, outreach and application process to ensure full compliance with all applicable requirements.

All rental advertisements will bear the Fair Housing logotype and slogan, and any information sheets will also indicate accessibility to the disabled. A Fair Housing poster will be conspicuously displayed in the rental office and where initial rend-up will occur.

Reasonable Accommodation

The Owner will establish and implement a procedure to respond to requests for reasonable accommodation by all tenants. Such procedure will require a provision in each tenant lease that such tenant may be entitled to reasonable accommodation. The procedure will provide that if the Owner intends to evict a tenant, it is first considered whether or not a reasonable accommodation is appropriate. If a requested accommodation is denied because it is not reasonable, the Owner will make efforts to determine if there is an alternative reasonable accommodation that would effectively address the tenant's disability-related needs.

The Owner understands and agrees that an MHSA-Eligible applicant is, by definition, a disabled individual who may be entitled to reasonable accommodations in the application and admission process. The Agent shall establish and implement a procedure to respond to requests for reasonable accommodation by all applicants. Such procedure shall provide for the following:

- The Owner will provide notice to all applicants that disabled applicants may be entitled to a reasonable accommodation in the tenant selection and admission process;
- If a requested accommodation is denied because it is not reasonable, the Owner will make efforts to determine if there is an alternative reasonable accommodation that would effectively address the applicant's disability related needs;
- The Owner will not be obligated to admit an MHSA-Eligible applicant who requires supportive services as a reasonable accommodation in order to meet the terms of tenancy if the applicant does not have access to supportive services or cannot otherwise obtain such supportive services;
- The Owner agrees that examples of reasonable accommodation include, but are not limited to: applicant access to representative- payee services to ensure tenant portion of rent will be paid to Owner on a monthly basis in accordance with the standard form of Lease;
- Nothing herein will require that the Owner keep units vacant for a period of longer than thirty (30) days in order to determine if there are reasonable accommodations that can be offered to the applicant to allow the applicant to meet the terms and conditions of tenancy.

D4. SUPPORTIVE SERVICES PLAN

The Supportive Services Plan: An Overview

The primary objective of the Supportive Services Plan is to support the tenants in maintaining their housing at the Project. The principles of the MHSA housing services are tenant choice, voluntary services, and for the supportive service providers to do "whatever-it-takes" to help individuals maintain their housing. Tenants will be encouraged and supported in building a sense of community within their home and with the surrounding neighborhood. The Project aims to separate the housing from the services with the goal of ensuring that housing is not conditioned upon receiving services or having a specific service provider. It also encourages the best outcome for providing housing with supportive services, using an experienced and successful Owner and Property Manager to take responsibility for the physical structure and tenancy obligations, and collaborating with an experienced and successful Service Provider to provide the supportive services necessary for independent living and stable housing.

Services provided will abide by the following principles:

- Services are voluntary and individual tenants cannot be mandated to participate in services as a condition of their tenancy. However, tenants that are unable to meet their tenancy obligations may need to access and utilize services to maintain their housing. Tenants that repeatedly fail to meet their tenancy obligations and refuse the supports necessary to meet these obligations may lose their housing.
- Service Providers will provide contact information to the Owner for the tenants they serve in the Project. Client-specific service provider information can only be shared with explicit permission from the client. Service Providers agree to work to receive this consent as part of their work with individual clients.
- Service Providers agree to provide appropriate contact information and resources for potential service-related needs for their client(s) on a 24 hour, 7 day per week basis. This may not include a guarantee of a direct visit to the site but is intended to provide ongoing phone consultation as a minimum standard.
- Service Providers commit to responding to requests for support from Property Managers on behalf of the Project tenants within 24 hours of receiving such requests. At a minimum, Service Provider staff must follow-up with a phone response to the Property Manager.
- During the first six months of a new tenant moving into the Project, Service Providers commit to at least weekly home visits to meet with the tenants. After the initial six months of a tenant's occupancy, Service Providers will maintain at least monthly home visit contact with the tenant.
- Service Providers will maintain at least monthly regular contact with the Housing Service Coordinator via the phone or through a formal meeting.
- BHCS will meet with the Owner, Property Manager and Housing Service Coordinator on at least a quarterly basis or more frequently if necessary. The Project's dedicated staff person from BHCS will help to ensure that tenants are receiving appropriate supportive services and that concerns raised by the Owner are addressed in a timely fashion.

Services will be client centered and will begin with a needs and strengths assessment and personal goals plan. The needs assessment for supportive services will be completely separate from the property management screening process, and all documentation will be kept separately. The initial assessment will include, but is not limited to areas such as financial, mental and physical health, transportation, employment/vocation, and housing. Each tenant of the Project will receive support from the Housing Service Coordinator. In addition, most tenants of the Project will also receive support from a multidisciplinary mental health service team that typically includes a psychiatrist, personal service

coordinator, and peer support staff. Additional support services will be provided by a variety of other resources, such as the Alameda County Vocational Program, primary care clinic partnerships, and recovery education centers. Tenants with an assigned personal service coordinator will have their services managed by this coordinator. Tenants not receiving services from a service team will have their supportive services managed by the Project's Housing Service Coordinator.

Services will also focus on housing retention and helping clients achieve personal goals. Assisting individuals in identifying the actions or behaviors that may have caused them to lose their prior housing and developing strategies to prevent such actions or behaviors will be a primary focus of supportive services. For example, the Housing Service Coordinator will initially check in with new tenants once a week to offer a smooth transition into the housing, and will then continue one-on-one check-ins at least once a month. Regular and on-going activities and supportive service updates will also be provided to tenants, as a way to encourage tenants to develop and build a community. The variety of activities will take place in both the home and within the larger community, and may include peer support groups, outings, and movie nights. All services will be voluntary.

In order to retain tenants and reduce challenges, BACS support staff will be available 24/7 to respond to crisis or other tenant issues that require this level of support. The support staff will work together to identify behaviors that place the tenant at risk for eviction, and will be proactive in supporting both the tenant and the Property Manager to avoid such an action.

Home Sharing Agreements

A Home Sharing Agreement is developed and agreed upon by tenants and sets forth guidelines for a home sharing arrangement. It should include conflict resolution protocols and other matters affecting the household that are not necessarily lease-related. It will be developed in collaboration with the Housing Service Coordinator, and reviewed for modifications during monthly tenant meetings.

Below is an example of some elements of a Home Sharing Agreements that may or may not be adapted as part of the Project. As stated above, an actual Home Sharing Agreement will be developed by the tenants of each household after move-in:

- Loud television, music or other noise is only permitted between the hours of 8am- 10pm.
- Laundry hours are from 9am- 10pm.
- Respect the privacy and personal belongings of others by remaining out of fellow tenants bedrooms and locked spaces unless given explicit permission.
- The communal spaces such as the kitchen, living room, and the bathroom I am assigned should remain clean at all times. All residents will be expected to clean up after themselves.
- Where all tenants share a space (such as the kitchen, bathroom and laundry room), it is the responsibility of all to help maintain a clean household. We agree to rotate weekly on kitchen and bathroom clean-up, in the order and duties as discussed in the monthly tenant meetings.
- Tobacco products are not allowed to be used inside the house.

House Rules

House Rules are an addendum to the Lease, and can be changed over time. Tenants will provide input on the House Rules, but the rules are determined and enforced by the Property Manager. Some examples of House Rules include:

- Overnight guest visitations are limited to **three (3)** consecutive nights per month. Any overnight visits will be discussed in advance with the Property Manager and housemates.
- No pets, including fish, are allowed on the premises without written approval.

- Overnight visits of children require prior approval from the Housing Service Coordinator, Property Manager and housemates.

The Supportive Service Team

The Owner of the Project is Housing Consortium of the East Bay (HCEB). The Property Manager will be employed by, or an Agent of, the Owner. Alameda County Behavioral Health Care Services (BHCS), as the contract monitor, will ensure service delivery. Bay Area Community Services (BACS) will be the BHCS-designated service provider for the Project. The Housing Service Coordinator, employed by BACS, will provide direct support related to an individual's housing at the Project and assist with coordination with other supportive service providers. The Housing Service Coordinator, Service Provider(s) and Property Manager will be the primary contacts that a tenant will have to ensure successful supportive services in their housing. Each of these roles is described in detail below.

In addition, the above Supportive Service Team members will have assistance from BHCS, BACS and the Owner. BHCS will make sure that tenants of the Project are linked with appropriate supportive services, as required by the MHSA Housing Program guidelines. BACS will hire and supervise the dedicated full-time Housing Service Coordinator to work on-site with the Project tenants and will ensure that the Housing Service Coordinator is properly supported to perform his/ her work effectively and successfully. Support includes providing on-call staff that will direct calls as appropriate, providing back-up staffing when the Housing Service Coordinator is not available to work, and coordinating with other mental health team providers regarding primary services. The Owner will guarantee that all on-site Property Management staff are competent and sensitive to special needs tenants and trained properly on when to contact the Housing Service Coordinator and/ or service provider(s), and how to communicate information about emergencies to the supportive services team.

Housing Service Coordinator: The primary contact that a tenant will have related to his/ her housing situation is the Housing Service Coordinator. The responsibilities of the Housing Service Coordinator are to act as the “first responder” to a tenant’s housing-related issues, to coordinate the services of all tenants in each home and to organize and foster community building through tenant meetings and social events. It is anticipated that this position will require a single full-time person to cover the 3-4 single-family homes and 9-12 tenants of the Project, with 24/7 on-call staff at BACS to direct calls. This will ensure that a basic level of support is available for all tenants at all times.

As the “first-responder”, the Housing Service Coordinator will be the primary contact with the Property Manager and will act as the liaison between the tenant, Owner, Property Manager, tenant’s service provider and the community. The Housing Service Coordinator will maintain ongoing weekly contact with each tenant to determine needs in advance of housing or property management issues. In addition, they will also maintain ongoing contact with each tenant and their service provider to discuss any housing challenges, relations with neighbors, service provision issues, and interaction with property management staff, maintenance issues, and any upcoming certifications. If there are any difficulties in their housing situation, the Housing Service Coordinator will assist the tenant in addressing these issues. For the tenants who have a service provider, the service provider will be included in these discussions, and they will be responsible for taking the lead to address identified issues. The Housing Service Coordinator will also be responsible for communicating and helping to address potential lease violation, eviction prevention and overall housing stabilization issues. In some cases where a tenant does not have a service provider, it may also be reviewed with a tenant how services might enhance their ability to successfully maintain their housing. This position will also be linked with BACS, and will have a full

back-up support team in the case of emergencies. BACS will provide support to the Housing Service Coordinator, including support staff that field calls during off-hours in advance.

The Housing Service Coordinator will coordinate the services of all tenants in each of the homes. For instance, some tenants may not have a service provider. In this case, information will be provided publicizing open houses offered by service providers, resources and resource fairs. It is also expected that each of the tenants in the Project may have a different service provider and different on-site services provided. The Housing Service Coordinator will coordinate the schedules of the different service providers to provide the most effective services with the least disruptive conflicts and security issues.

As the organizer for community building and tenant engagement in the Project, the Housing Service Coordinator, at a minimum, will coordinate and manage: 1) monthly tenants meetings within each home; 2) gatherings during major holidays and two additional programs annually within the Project to promote community integration and community building; 3) regular and preventative communication with local law enforcement agencies; and 4) interested tenants in attending events that may be of significance to the tenants (such as ground-breakings for other similar Projects). The Housing Service Coordinator will also act as tenant organizer, encouraging and coordinating tenants to actively participate in self-advocacy. In cases where multiple tenants are traveling to an event, the Housing Service Coordinator will work with the tenants and their Service Provider to arrange transportation.

Service Provider: While the Housing Service Coordinator's responsibilities are for overseeing the housing coordination of all the tenants in the Project, an individual's service provider is responsible solely for assisting their own client(s) in successfully maintaining their housing. It is not expected that all tenants will have a Service Provider.

The service provider will work with their client(s) to promote a successful tenancy and lease compliance. This includes sometimes initiating tenant-specific meetings with the Housing Service Coordinator to address behavioral issues, in an effort to mediate behavioral problems and arrive at mutually acceptable solutions. The service provider will also offer assistance to tenants in requesting and obtaining any reasonable accommodation during the tenancy and implement procedures to ensure that their client receives accurate, appropriate, and timely information from Owner.

If an eviction occurs, the service provider will help the tenant find alternate accommodations. They will also work with tenants at imminent risk of being evicted, to proceed with voluntary departure, in order to avoid finalization of the eviction process. A Service Provider will also provide specific support to tenants who are settling an eviction action through a stipulated settlement, when all parties agree that supportive services will enable the tenant to remediate the behavior that led to the stipulated settlement.

The service provider is also a tenant's primary contact for general supportive services, including outreach, goal planning, information and referral, case management, living skills assistance, coordination of services, and conflict resolution. A critical component to the service provider's work is to ensure the overall success of a tenant's health and welfare, and therefore oversees the coordination of their client's primary care health, mental health and medical services, substance abuse services, employment, education, training and financial assistance, legal services, and other non-housing services. In many cases, the service provider will also coordinate benefits and money management assistance, including assistance applying for public benefit programs, referrals for payee services, credit counseling

referrals, assistance with budgeting, establishing bank accounts, and arranging for short-term rental assistance when needed. As needed, a service provider may also be required to assist with arranging transportation for their client(s) for community-focused meetings and events.

Property Manager: The Property Manager will ensure that the housing is meeting the needs of the tenants within reason and law, maintaining the Project's housing compliance with disability accessibility, Fair Housing and Tenant Rights laws. The Property Manager is responsible for proper maintenance and operations of each building, and will coordinate repairs and replacement as needed.

Housing Service Coordinator and Property Manager Relationship: A critical element in supporting the tenants will be the relationships between the Housing Service Coordinator and the Property Manager. Both will need to maintain effective communication in order for the relationship to be successful.

Services will be closely coordinated by the Housing Service Coordinator and Service Provider staff, and the Service Providers will meet monthly to review individual cases. Each service provider will also meet weekly to discuss their own cases. The Housing Service Coordinator will be available to tenants on a weekly basis, and in addition, will check in with the Property Manager once per week to identify any concerns. As stated previously, the Service Provider, Property Manager, and Housing Service Coordinator will meet monthly to review progress and challenges.

Urgent issues will be addressed by phone conferencing as needed. The Property Manager will contact the Housing Service Coordinator when behaviors are placing an individual at risk for eviction. These issues will be addressed during the monthly meetings to develop a plan to retain that tenant. Meetings can be scheduled at any time to discuss urgent concerns regarding behaviors. Communication and understanding the roles of the Property Manager and the Housing Service Coordinator will be critical in supporting and retaining the tenants. There will be defined roles and responsibilities between the Housing Service Coordinator and Property Manager, with the common goal of supporting each other to retain tenants in their housing.

In addition, training and team-building activities will take place on a regular basis. Additional support and education will be available to all staff as the need arises. Areas that may need additional training and attention are working with active substance use, employment, and finances. The Housing Service Coordinator will be responsible for overseeing and ensuring that the coordination is taking place and is successful.

D5. SUPPORTIVE SERVICES CHART

Supportive Services	Description	Target Population(s)	Primary Provider	Location(s)
Intake/ Assessment	Strength-based, client centered initial assessment	All tenants	BHCS or BHCS-designated service provider	Provider office
General Service Coordination	Outreach, goal planning, living skills assistance, coordination of supportive services, case management, etc.	All tenants	BHCS- designated service provider	On-site or provider office
Housing Service Coordination: General	First Responder & Tenant Liaison, Service Provider Coordination, Community Building	All tenants	Housing Service Coordinator	On-site or provider office
Housing Service Coordination: Event Specific	Housing retention assistance, conflict resolution, advocacy, emergencies, etc.	All tenants	Housing Service Coordinator, BACS, BHCS-designated service provider	On-site or provider office
Health/ Medical	Primary care & referrals, mental health services, substance abuse counseling, crisis services, etc.	All tenants	BHCS- designated service provider	Provider office or appropriate facility
Employment	Assistance with obtaining and maintaining employment	All tenants	BHCS-designated service provider working with Vocational Program	Provider office/Vocational Program Office
Transportation	Coordination of transportation, both for individuals and for household activities	All tenants	Housing Service Coordinator, BHCS-designated service provider	--
Short-Term Rental Assistance	Financial assistance to help individuals pay their share of rent	All tenants	BHCS- designated service provider with BHCS Housing Services Office	Provider office
Property Management	Property management staff training, building maintenance & upkeep, building-related tenant issues, etc.	All tenants	Owner or Owner's Agent	On-site or provider office
Supportive Housing Project Compliance	Ensuring that Project is in compliance with MHSA Housing Program and project commitmetns	All tenants	BHCS	On-site or provider office