

# Proposal

TO PROVIDE  
HOUSING PROGRAMS  
ADMINISTRATIVE SUPPORT SERVICES

Submitted to:

CITY OF FULLERTON  
Community Development Department  
303 West Commonwealth Avenue  
Fullerton, CA 92832  
ATTN: Ms. Rebecca Leifkes,  
Housing and Neighborhood Services Manager



*SUBMITTED BY:*

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## INTRODUCTION TO THE FIRM

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Comprehensive Housing Services, Inc. (CHS) is an Orange County-based urban planning firm that has specialized in providing technical assistance, training, and cost-effective administrative support services for community development and affordable housing programs and activities since 1991. We have a history of furnishing effective services to local governments, redevelopment successor agencies, community-based organizations and for-profit and non-profit developers.

The staff of CHS is well versed in all Federal, State, and local resources for community development and affordable housing. Program management staff is trained in the statutory and regulatory limits of the Community Development Block Grant Program (CDBG) and the HOME Investment Partnerships Program. Our direct work experience over the past twenty seven years includes all elements of the City's RFP Scope of Work.

CHS is:

- Federally-certified as a Disadvantaged Business Enterprise (DBE)
- Federally-certified as a Small Business Enterprise (SBE)
- Federally-certified as a Woman-owned Business Enterprise (WBE)
- approved by the California Department of Industrial Relations (DIR) as a Labor Compliance Program (LCP) Administrator



### **Adherence to Policies and Procedures**

All CHS file documents are kept in accordance with Federal and State statutory and regulatory record keeping requirements. Furthermore, as part of our on-going business practice, CHS maintains sensitive and confidential materials, records and information in a secure manner since we recognize that it is critical to guard information so that person(s) to which information pertains are not unduly exposed to financial or personal risk.

CHS does not discriminate at any time against any person because of their race, gender, religion, creed, color, age, national origin, physical handicap, mental condition, marital status or sexual orientation.

### **Responsiveness/Accessibility**

All CHS staff is available by telephone and e-mail, during business hours (8: 00 am to 5:00 pm), on a daily basis (Monday – Friday), to respond quickly, clearly and thoroughly to all issues and questions from our Client Agencies.

### **Point of Contact**

Gayle Bloomingdale, President  
8840 Warner Avenue, Suite 203  
Fountain Valley, CA 92708  
714-841-6610 office  
714-841-4341 fax  
e-mail: [gayleb@comphouse.net](mailto:gayleb@comphouse.net)

### **Computer Programs and Technological tools**

CHS utilizes the following computer programs and technological tools as an important part of our efficient and effective professional business practice:

- ❖ WINDOWS 10
- ❖ WORD
- ❖ EXCEL
- ❖ ACCESS
- ❖ POWERPOINT
- ❖ OUTLOOK
- ❖ ADOBE ACROBAT PROFESSIONAL
- ❖ I.D.I.S.

## SERVICES PROVIDED

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1. **PROGRAM DESIGN:** CHS prepares all policy and procedural guidelines for affordable housing programs, whether the programs include rehabilitation loans, leveraging of private lender funds, tenant assistance, first-time home ownership, property acquisition or other eligible activities.
2. **IMPROVING PROGRAM OPERATIONS:** CHS analyzes and improves operating procedures for CDBG and HOME Program operation. Such services include a review of processes as they relate to the adherence of regulations, set-up of monitoring procedures, and the funding process.
3. **PROBLEM SOLVING FOR LOCAL AGENCIES:** CHS provides assistance to local government agencies with respect to program funding issues, contractor disputes, Davis-Bacon Act compliance and other related matters.
4. **FEDERAL REPORT PLANNING/PREPARATION:** CHS gathers and analyzes all relevant information to prepare Annual Action Plans and Consolidated Annual Performance and Evaluation Reports (CAPER). In addition, CHS prepares Five-Year Consolidated Plans.
5. **DAVIS-BACON WAGE COMPLIANCE:** CHS assists local governments by performing the required steps to assure that all laborers employed by contractors on certain Federally-funded construction projects are paid at the actual wage rates determined by the U.S. Department of Labor at the time of construction.
6. **IDIS:** CHS provides data input into the Federal Integrated Disbursement Information System (IDIS) which is a computerized reporting system that is designed to ensure proper grant expenditure.
7. **OPERATING HOUSING PROGRAMS:** CHS administers and assume lead day-to-day responsibility for operating single family and multifamily housing programs, which includes marketing activities, borrower coordination, loan processing, construction monitoring and general administrative work associated with the effective operation of affordable housing programs.

## **STAFF TRAINING / UNDERSTANDING OF PROGRAM REQUIREMENTS**

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Over the past twenty seven years, CHS staff has attended numerous training sessions concerning the proper administration of the CDBG Program and the HOME Program. A sampling of the topics includes:

- Rehabilitation Construction Management
- Specification Writing for Rehabilitation
- Part 35, subparts A, B, J, K, and R (Lead Based Paint Hazards)
- Title VI of the Civil Rights Act of 1964
- Title I of the Housing and Community Development Act of 1974 and 1987
- Title III of Division B of the Housing and Economic Recovery Act of 2008
- 49 CFR Part 24 – Uniform Relocation/Real Property Acquisition
- Environment Review, including the Request for Release of Funds
- Running the HOME Program
- IDIS Training
- Managing the CDBG Program
- Consolidated Planning Process
- Financial Management for Federal grants
- Section 3 of the Housing and Community Development Act of 1968
- Davis-Bacon Labor Standards
- Non Profits and the HOME Program
- 24 CFR, Part 570, Subparts A-O
- CDBG Community Building
- Affirmative Marketing, MBE/WBE
- Monitoring CDBG Sub Recipients
- HPRP Program requirements

# **ADDITIONAL QUALIFICATIONS**

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## **Adherence to Policies / Procedures**

CHS complies with all Federal, State and local statutes, regulations, and ordinances such as:

- \_ Title I of the Housing and Community Development Act of 1974 and 1987
- \_ Title III of Division B of the Housing and Economic Recovery Act of 2008
- \_ 24 CFR, Part 570, Subparts A - O
- \_ 49 CFR Part 24 - Uniform Relocation / Real Property Acquisition
- \_ Title VI of the Civil Rights Act of 1964 and 1968
- \_ 42 U.S.C. Fair Housing Act
- \_ Environmental Review (Part 58)
- \_ Part 35, subparts A, B, J, K, and R (Lead Based Paint Hazard)
- \_ Section 3 of the Housing and Urban Development Act of 1968
- \_ MBE/WBE Outreach
- \_ Davis-Bacon Act - Labor Standards
- \_ Affirmative Marketing
- \_ Section 504

## I. ADMINISTRATION

CHS proposes to provide administrative support services and technical assistance to the City of Fullerton's State and Federally-funded programs, as requested. Such services may include:

### A. CITIZEN PARTICIPATION PLAN

CHS shall execute the City's Citizen Participation Plan throughout the Consolidated Planning process to encourage widespread citizen input, with a special emphasis on efforts to encourage participation from the following population:

- Low and moderate income persons
- Residents of blighted areas and/or predominately low-moderate income areas
- Non-English speaking
- Persons with disabilities

### B. PREPARATION OF THE FEDERAL ONE-YEAR ACTION PLAN

CHS shall prepare the City's One-Year Action Plan as follows:

Resources – This section identifies the resources from private and public sources. The plan describes those amounts allocated under HUD formula grant programs, program income that the City expects to receive during the program year, and proceeds from Section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives.

Statement of Specific Annual Objectives – This section describes the City's summary of the priorities and specific annual objectives to be addressed during each program year. The section describes how the formula grant funds and program income the City expects to receive during the program year will be used to address identified needs during the forthcoming program year. Each specific objective addresses a priority need must contain proposed accomplishments and the annual program year numeric goals the City hopes to achieve in quantitative terms during the time period, or in other measurable terms as identified and defined by the City.

Activities to be Undertaken – This section describes the eligible programs or projects that will take place during the program year to address the priority needs and specific objectives identified. The description of projects shall estimate the number and type of families (including income level) that will benefit from the proposed use of funds, and identify the specific local objectives and priority needs that will be addressed. The section indicates the number and type of proposed accomplishments the City hopes to achieve and a target date for the completion of the project.



Geographic Distribution – This section describes the geographic areas of the City (including areas of minority concentration) in which it will direct assistance during the program year.

Homeless and Other Special Populations – This section describes projects to address emergency shelter and transitional housing needs of homeless individuals and homeless families with children (including the subpopulations), to prevent low-income individuals and families with children (especially extremely low-income) from becoming homeless, to help homeless persons make the transition to permanent housing and independent living, and to address the special needs of persons who are not homeless but require supportive services, such as persons with disabilities and persons living with HIV/AIDS and their families.

Other Actions – This section describes the actions that will address obstacles to meeting underserved needs, maintain affordable housing, remove barriers to affordable housing, develop institutional structure, enhance coordination between public and private housing, health, and social service agencies.

General Narratives – This section contains general narratives that link the Annual Action Plan to the general narratives in the City's Consolidated Plan.

Fair Housing Strategies – This section addresses long-term fair housing strategies based on the City's Analysis of Impediments to Fair Housing.

Program Narratives – This section contains specific requirements regarding program narratives in order to allow citizens to determine the degree to which they may be affected.

Lead-Based Paint Hazards – This section describes the actions that will be taken by the City to evaluate and reduce the number of housing units containing lead-based paint hazards in order to increase the inventory of lead-safe housing available to extremely low-income, low-income, and moderate-income families.

Monitoring – This section describes actions that will take place to monitor housing and community development projects and to ensure long-term compliance with program requirements. Program requirements include appropriate regulations and statutes of the programs involved, including steps being taken to review affordable housing projects, ensure timeliness of expenditures, on-site inspections to determine compliance with housing codes, and actions to be taken to monitor its sub recipients.

### **C. PREPARATION OF THE FEDERAL CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT**

CHS shall prepare of the City's Consolidated Annual Performance and Evaluation Report (CAPER) as follows:

Assessment of Goals and Objectives - This section includes a description of how activities undertaken during the program year address pertinent objectives and areas of high priorities identified in the City's Consolidated Plan.

Affirmatively Furthering Fair Housing - This section includes actions taken to affirmatively further fair housing.

Affordable housing - This section includes an evaluation of progress in meeting specific objectives to provide affordable housing, including the number of extremely low-income, low-income, and moderate-income renter and owner households assisted during the reporting period and the number of households assisted with housing that meets the Section 215 definition of affordable housing for rental and ownership.

Continuum of Care - This section includes actions taken to address the needs of homeless persons and the special needs of persons that are not homeless.

Other Actions - This section includes other actions indicated in the One-Year Action Plans.

Leveraging Resources - This section includes other public and private resources that address needs identified. The section discusses how Federal resources (made available from HUD) are leveraging other public and private resources, including how matching requirements were satisfied.

Self-Evaluation - This section includes an evaluation of accomplishments, as well as plans for the future.

Amendments - This section includes any amendments undertaken during the program year that were not submitted directly to HUD.

#### **D. Preparation of the Five-Year Consolidated Plan**

CHS shall prepare of the City's Five year Consolidated Plan for FY 2020-2025 as follows:

1. Housing Needs. This section will include:

- Estimations of the City's housing needs projected over the next five years;
- Assessment of the City's housing needs for households residing in and those expected to reside in the City;
- Analysis of the needs for assistance among very low, low, and moderate income renter and owner households;
- Specification of identified needs for large families, single persons, the elderly, persons with disabilities (including persons with HIV/AIDS and their families);
- Analysis of housing needs in terms of the numbers of households experiencing specific housing problems including cost burden, substandard housing and overcrowding;
- Assessment of any identified need to the extent that any racial/ethnic group has a disproportionately greater need for any category in comparison to that income category as a whole.

2. Homeless Needs. This section will include:

- Description of the nature and extent of homelessness;
- Assessment of the need for facilities and services for homeless individuals, homeless families with children and subpopulations, by racial and ethnic group if possible.
- Comprehensive listing of existing facilities and services including the household types and subpopulations served.

3. Lead Based Paint Needs. This section will include an estimation of the numbers of housing units that are occupied by low and very low income
4. Market Conditions. This section will be comprised of the following components:
  - Description of the significant characteristics of the City's housing market in terms of supply, demand condition and the cost of housing.
  - Narrative providing information related to the number and targeting of units currently assisted by local, state, or federally funded programs. This part will also discuss whether these subsidized housing units are at risk of being lost from the assisted housing inventory.
5. Barriers to Affordable Housing. This section will provide an analysis of the various City policies including tax policies, land use controls, zoning ordinances, building codes, fees and charges, growth limits and how they have affected the rate of residential return and through incentives to develop, maintain, or improve affordable housing within the City.
6. Fair Housing. Documentation will be prepared certifying that an analysis of the impediments to fair housing has or will be completed by the City.

Housing and Community Development Strategic Plan. The narrative for this section will be developed to meet the statutory goals of elimination of conditions that are detrimental to health, safety and public welfare and expansion of the nation's housing stock, expansion and improvement of the quantity and quality of community services, better utilization of land and other natural resources, reduction of the isolation of income groups within communities and geographical areas, restoration and preservation of properties of special value, alleviation of physical and economic distress and conservation of the nation's scarce energy resources. The primary elements to be included in this section of the Consolidated Plan are as follows:

1. Housing and Community Development Resources. This section will include:
  - A listing of all resources from public and private sources, including the amount allocated under HUD formula grant programs that are reasonably expected to be made available to carry out the Consolidated Plan.
  - An explanation of how funds made available will leverage those additional resources.
  - Identification, where appropriate, of publicly owned land or property that may be utilized to carry out the Consolidated Plan.
2. Housing and Community Development Objectives and Projects. This section will be divided into subsections to address the primary concerns identified by HUD. Where appropriate, each subsection will include the following:
  - Descriptions of how each defined action, project and program can be coordinated to increase the benefit to low and very low income residents.
  - A discussion outlining the City's reasons for selecting its priority needs and allocation priorities from Table 2.
  - Identification and assessment of the obstacles to addressing underserved needs.
  - Identification of specific objectives for each priority identified in Table 2 of the

Consolidated Plan. Each objective will identify the goals to be achieved in quantitative terms; provide the information in numeric or other measurable indicators of progress; target dates for completion;

- Provide goals for the number of households for which it will provide affordable housing according to the standards of Section 215 of Title II of the National Affordable Housing Act of 1993.

## **Subsections**

Priority Housing Needs. This section will identify the actions, programs and projects that the City intends to initiate and/or complete over the next five years which will address the priority housing needs of the City. Specifically, the following will be included:

1. An investment plan for the City's available housing resources including identification of general priorities for allocating investment geographically within the City and among different activities and housing needs.
2. A description of how the housing needs characteristics of the City will influence the use of funds made available for rental assistance, production of new units, and rehabilitation of old units or acquisition of existing units.

Priority Homeless Needs. This section will identify the actions, programs, and projects the City intends to initiate and/or complete over the next five years which will address the priority homeless needs of the City. Specifically, the following will be included:

A description of a system to address the needs of the homeless individuals, homeless families with children, homeless youth, and homeless persons with severe mental illness and/or alcohol and other drug abuse problems, homeless victims of violence, or persons with HIV/AIDS. The strategy will include proposed efforts to be made in the areas of outreach and assessment emergency shelters and services, transitional housing, permanent supportive housing, access to permanent housing, and activities to prevent low income individuals and families with children.

Priority Non-Housing Community Development Needs. This section will identify the priority non-housing community development needs of the City including public improvements, public facilities, public services, and economic development.

Other Special Needs Populations. This section will include a description of the priority housing and supportive service needs of persons with special needs (i.e. elderly, persons with disabilities (including persons with HIV/AIDS), and public housing residents to the extent that data is available.

Anti-Poverty Strategy. This part of the Plan will provide a description of the City's goals, programs, and policies for reducing the number of households with incomes below the poverty line. The narrative will also include a description of how the City's housing strategy will reduce the number of households below the poverty line.

Lead Based Paint. This section will include a description of the actions proposed to be or are being taken to evaluate and reduce lead based paint hazards and how that reduction is being integrated into the City's housing policies and programs.

Institutional Structure. This section will describe the method by which the City will overcome gaps in the institutional structure for carrying out its strategy for addressing priority needs.

Coordination. This section will describe the means and cooperation and coordination among different jurisdictions, departments, agencies, organizations, people, and facilities to achieve stated objectives and to reduce the number of households with incomes below the poverty line.

#### **E. INTEGRATED DISBURSEMENT INFORMATION SYSTEM (IDIS)**

CHS shall assist the City in the record keeping process for Federal grants by utilizing the Federal I.D.I.S. to input certain data as follows:

- A. Set-up projects and/or activities
- B. Fund projects and/or activities
- C. Provide reports
- D. Conduct monthly budget review
- E. Project completion/data Input

#### **F. ENVIRONMENTAL REVIEW**

CHS shall prepare all necessary Environmental Review forms and documents.

#### **G. PUBLIC SERVICE PROGRAM**

CHS shall prepare the annual Notice of Funding Availability for CDBG and HOME Program funds.

Working with City staff, CHS will assist in the review of the submitted funding proposals and the preparation of reports for the City's Community Services Commission and the City Council regarding the each fiscal year's allocation of funding for public services and capital improvement projects.

For the funded sub-recipients, CHS will coordinate the preparation of the sub-recipients' contracts with the City Attorney, review the submitted quarterly sub-recipients' status reports, review sub-recipient invoices for accuracy and eligibility, track payments and progress toward meeting the stated goals of each sub-recipient.

CHS may provide training and technical assistance to all funded sub-recipients for CDBG and HOME Program compliance, if requested.

#### **H. GENERAL ADMINISTRATION**

CHS shall create and maintain files for CDBG and HOME-funded projects/programs to ensure appropriate documentation and compliance with all applicable regulations as well as any other services required to properly administer the City's CDBG and HOME Programs.

CHS will research, compile, organize and interpret data/information as requested by the City staff.

CHS will work with City staff, as needed, to maintain all financial records as defined by the specific program guidelines and HUD.

CHS will prepare Public Notices and attend public meetings, as needed.

During HUD monitoring, CHS will assist the City in gathering and providing all requested information to assure compliance with HUD requirements.

## **I. REPORTING**

CHS shall generate monthly reports in the format provided by the City concerning the status of program and project accomplishments. In addition, CHS shall prepare the annual HUD 2516 – Contractor/Subcontractor Activity Report as well as data entry into the HUD Section 3 Performance Evaluation (SPEARS) Registry System.

## **J. MONITORING PLAN**

CHS shall develop a monitoring plan and utilize such plan to monitor all CDBG and HOME Program projects/programs for compliance with all applicable program requirements. CHS shall prepare all HUD-required reports (See Attachment B), notices and documents necessary to process any City-approved amendments to the Consolidated Plan and/or One Year Action Plan.

## **II. HOMEBUYER ASSISTANCE PROGRAM**

CHS proposes to annually monitor existing Homebuyer Program participants and will collect the following information to demonstrate compliance with their regulatory agreement with the City:

- Copy of the Property Hazard Insurance
- Copy of proof of the payment of Property Tax
- Executed Verification form
- Copy of the Household Adult's Driver license or California Identification card
- Copy of the Household's Federal tax return for the previous year
- Copy of utility bill such as telephone or electricity

When the City has received and processed a total repayment of the financial assistance that was provided by the City to a program participant, if requested, CHS shall prepare and record a Deed of Reconveyance with the County Recorder's Office.

## **III. TENANT BASED RENTAL ASSISTANCE PROGRAM**

CHS proposes to assist the City in the administration of the City's on-going Tenant-Based Rental Assistance Program as follows:

### **1. APPLICANT ELIGIBILITY**

- a. Upon receipt of an application for assistance or requalification, qualify the household utilizing HUD's on-line Technical Guide for Determining Income. Such a determination will include a third party verification of income documentation as well as verification of any and all assets in order to calculate the household's overall income eligibility for the program.

b. Coordinate to schedule an inspection of the tenant's unit to determine whether the housing unit meets the Federal Housing Quality Standards (HQS) as well as the City's building codes. Such an inspection will utilize HUD Form 52580 (See Attachment A - Inspection Form). Re-inspection will be conducted for units found initially to be non-complaint.

c. Prepare a HUD form for TBRA Set-up for each program participant that includes all information necessary for HOME Program compliance.

#### **IV. AFFORDABLE HOUSING**

The City's funding sources require annual certification and enforcement to ensure occupancy, affordable rents, tenant and income eligibility and property standards are in compliance throughout the duration of the written agreement for affordability. CHS proposes to assist in the annual rent and income recertification of all tenants that occupy the City's subsidized housing units as follows:

##### **A. Affordable Rent and Income Certification**

1. Annually, provide and collect certain information from the developer/owners of the subsidized housing units. Such information to be obtained shall include:

- Tenant Instructions (See Attachment C)
- Household annual income and composition
- Percent of the median of the household income
- Unit size
- Total Rent collected for each unit, including vacancy (See Attachment D)
- Total Rent paid by each household
- Maximum rent allowed
- Any other requirements stipulated by the City's Affordable Housing Agreements

2. Perform the affordable rent, occupancy and tenant income examination. Prepare and submit an annual report for each subsidized housing unit. Information shall include:

- Tenant name
- Unit size
- Maximum rent
- Rent paid
- Household income
- Number of occupants
- Utility allowance

3. If the package of information is incomplete, CHS will notify the project's contact person advising of the deficiency.



**B. Property Inspections**

- Based on the information provided by the City, contact each developer/owner/property manager to schedule an inspection of their housing units.
- Conduct an annual routine on site Housing Quality Standard (HQS) inspection of housing units and residential facilities to ensure each property meets Federal Standards (24 CFR 982.401) and other City building and safety codes.
- If necessary, inform the developer/owner/property manager about deficiencies. Digital photographs of conditions will be provided. A re-inspection will occur for units initially found to be non-compliant.
- After the inspection has been completed, prepare a Property Inspection Results Report for each unit inspected to include information regarding failed inspections, re-inspections and no shows.

**C. Financial management**

As requested, a review each Developer's property management records in order to determine the project's financial status and whether or not they are in compliance with their Affordable Housing Agreement with the City.

**D. Fair housing**

As requested, CHS may review each project's marketing activities for fair housing and affirmative marketing requirements.

**V. Residential Rehabilitation Program Administration**

**A. INTAKE/ASSESSMENT OF ELIGIBILITY (REVIEW OF APPLICATIONS)**

CHS may maintain the City's Wait List. Upon receipt, CHS will review each application as it is received (first come, first serve) to determine whether the applicant meets the Program's specific eligibility requirements. Each application will be dated and processed in the order received. CHS will review the application for completeness. Incomplete applications will be returned to the applicant.

CHS shall make the initial eligibility determination based on the established City Program eligibility criteria and the U.S. Department of Housing and Urban Development as follows:



1. Examine source documents and/or conduct a third party verification of income. Utilizing our computer system, CHS shall monitor the receipt of third party information and contact the appropriate information source if the income information has not been received within (5) business days from the date of mailing.
2. Obtain the documentation necessary to verify property ownership and equity position. Such information may include obtaining the evidence of title, and/or a drive-by appraisal.
3. Verify all assets in order to calculate the applicant's overall household income.
4. Prepare income eligibility documentation utilizing HUD's on-line Technical Guide.
5. Each applicant shall be apprised of their terms and conditions of participation in the City's Home Improvement Program. CHS shall prepare and send the approval/denial letter to the applicant. If the applicant does not qualify for financial assistance, the applicant will be advised of their appeal rights as set forth in the City's Program guidelines.

**B. PROPERTY INSPECTION**

Upon applicant and property eligibility determination, CHS will schedule an appointment at the subject property to conduct an initial physical inspection of the property to determine the need for rehabilitation measures to correct relevant local housing codes and/or Housing Quality Standard (HQS) deficiencies.

CHS will schedule other property inspections, if necessary (gas, lead hazard, termite, energy audit). Thereafter, CHS will prepare a Current Conditions Assessment Report that will establish the type of level of rehabilitation required. In initial inspection will also determine rehabilitation needs for the purpose of the funding recommendation, an environmental review and whether or not hazardous materials testing was necessary.

As required, CHS will obtain and review the City Building Department's Special Inspection results for inclusion into the scope of work.

**C. PREPARATION OF WORK SPECIFICATIONS/COST ESTIMATE**

For each property to be assisted, CHS will complete a Work Description and Bid Proposal that details the rehabilitation work to be performed, including estimated costs of each line item (activity), the material to be used and the

industry standards or regulatory standards to be meet. This write-up will be signed and dated by CHS and the applicant.

The scope of work shall be consistent with the Property Rehabilitation Standards set forth by the City.

**D. SOLICITATION AND SELECTION OF SUB-CONTRACTORS**

CHS will assist the applicant in the identification, proper solicitation, and selection of subcontractors qualified to perform the authorized rehabilitation of the property in accordance with the requirements of the City's CDBG and HOME Programs.

CHS will evaluate the submitted bids in relation to the cost estimate and document the process employed to determine the reasonableness of the bids. CHS shall ensure that the selected sub-contractor(s) is licensed by the California State Contractor's Board, is properly insured and is not debarred from working on Federally-funded projects. In addition, CHS will review additional information concerning the selected contractor Section 3 status, minority business status and woman owned business status.

**E. LOAN UNDERWRITING**

For HOME-funded projects an estimated post-construction valuation will be obtained through a process acceptable to HUD for such determinations. CHS will also determine that the HOME Program's maximum per-unit limits do not exceed the limits as promulgated by HUD in accordance with 24 CFR 92.250. CHS shall prepare a Loan Committee Report and shall schedule and attend the meeting of the Loan Committee.

**F. LOAN DOCUMENT EXECUTION**

CHS will provide all back-up documentation to City staff for the preparation of the Loan/Grant documents by the City. CHS will facilitate the execution of the documents by the applicant at the City offices. CHS shall provide fully executed duplicates of the originals of the documents to the applicant.

**G. CONSTRUCTION MANAGEMENT**

CHS will issue a Notice to Proceed three calendar days following the execution of the Contractor Agreement. All necessary permits shall be procured prior to the commencement of construction. Generally, work shall commence no later than 10 days from the date of the Contractor Agreement and work shall be completed no more than 30-60 days after the start date.

As rehabilitation progresses and as invoices are submitted by contractors, CHS will verify that the expenses are reasonable and that the work has been completed properly (including a sign-off by the applicant). CHS will conduct a final inspection upon completion of all work items and submit to the City the applicable form(s) executed by CHS and applicant indicating that the work has been completed and it is satisfactory. This will be the City's verification of CHS's approval of sub-contractor payment(s).

If necessary, CHS will authorize (with the applicant's written approval, including signature and date), any appropriate change orders.

#### **H. PROJECT CLOSE-OUT**

Upon completion, CHS will utilize the HUD's Guide for Review of Individual CDBG-funded Rehabilitation Activities (Exhibit 3-11) or HUD's Guide of HOME-funded Homeowner Rehabilitation Projects as assure complete compliance with all Federal requirements and regulations.

For each application, CHS will maintain all case files and other records, including but not limited to:

- Application
- Documentation of eligibility
- Work write-up
- Subcontractor selection criteria
- Copy of the contract/agreement/work order between the property owner and the subcontractor(s)
- Documents on all necessary licenses
- Documents on all necessary permits
- Site visit/inspection reports, including the final report
- Before and After Rehabilitation Photos
- Change orders, as applicable
- Subcontractor(s) invoices for payment, with the owner sign-off
- Information on persons residing in the property, including a list or lists identifying persons residing in the property immediately before the rehabilitation, after the rehabilitation is complete and those moving in during rehabilitation (per 24 CFR 570.606 and 24 CFR Part 24).

#### **I. COORDINATION WITH CITY STAFF ON INVOICES, GENERAL ISSUES**

CHS will coordinate with City staff regarding any issues that may arise for grant and/or loan applications and will obtain direction from the City staff for a course of action.

**J. PROVIDE PUBLIC INFORMATION**

CHS may provide general information regarding the City's program to the City's residents or may answer specific questions concerning the Program.

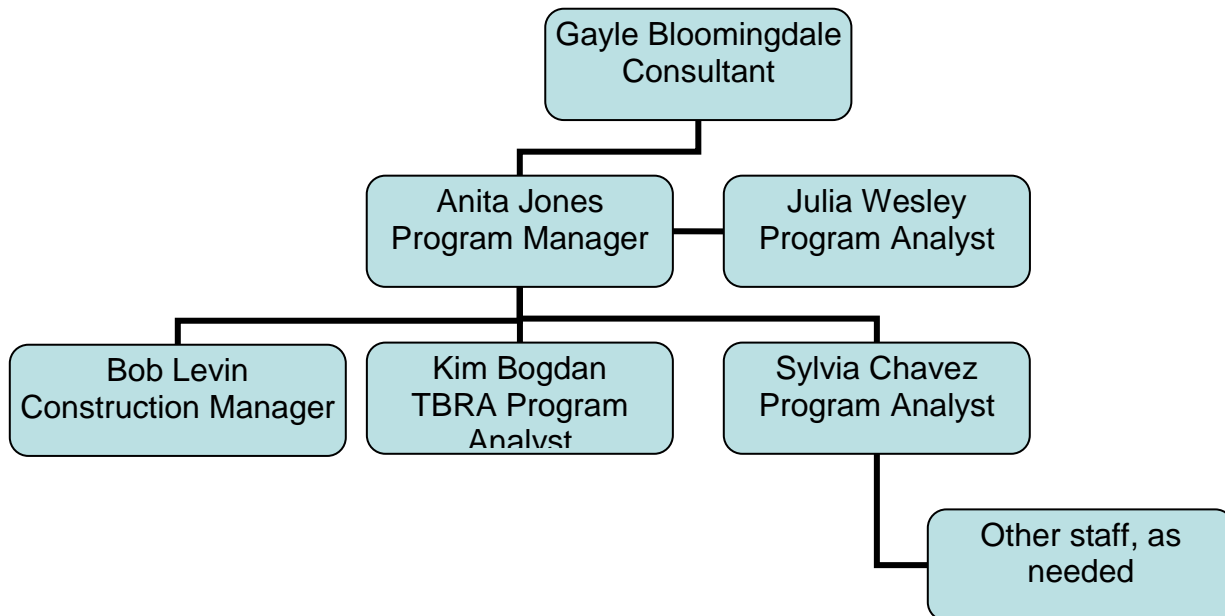
CHS will not discriminate against any person associated with any of the City of Fullerton's Programs because of their race, religion, creed, color, national origin, ancestry, physical handicap, marital status, sex or sexual orientation.

**K. PROVIDE MONTHLY STATUS REPORTS**

CHS will generate monthly status reports in the format provided by the City and submit each monthly report to the appropriate City staff.

**L. ADDITIONAL ADMINISTRATIVE SERVICES**

CHS will provide City staff with support such as the preparation of standard correspondence, maintaining financial records, research, compile, organize and interpret data/information, IDIS and SPEARS computer systems, as requested by the City staff.



## **Gayle Bloomingdale, Consultant**

Ms. Bloomingdale is experienced with the administration of Federally funded programs for community development and affordable housing. She has provided technical assistance to numerous State and local government agencies over the past thirty two years. Ms. Bloomingdale has worked with the I.D.I.S. system (set-up and data input), has prepared Consolidated Plans, One Year Action Plans and Annual Performance Reports for numerous agencies. Also, she has conducted on-site monitoring of sub-recipients, delivered training seminars and attended public meetings, Ms. Bloomingdale has earned a Bachelor of Arts Degree and a secondary education license. She also holds a Masters Degree in Urban Planning from the University of Michigan. Ms. Bloomingdale is a notary and has served as a licensed real estate broker.

## **Anita Jones, Programs Manager**

Ms. Jones is a highly seasoned professional with extensive experience in program administration and regulatory compliance. Ms. Jones is a results-oriented associate with strong interpersonal and project management as well as analytical and problem solving skills.

In her capacity as a CHS Program Manager, she administers various affordable housing programs such as subsidized rental assistance, including eligibility determination and housing inspector coordination, maintained all case files, computing annual income, preparing documents and reports.

From 2000-2010, she served as the Compliance Manager for Urban Futures, Inc. During this time, Ms. Jones managed the daily operations of the Compliance Department, monitoring compliance with affordable housing agreements, developed program policies and procedures and compiled the data and information for various customized reports.

Ms. Jones has obtained Bachelor of Science Degree/Business Administration from the California State University, Dominguez Hills, CA.

Ms. Jones is available to work on-site at regularly scheduled office hours, a minimum of two days per week.

**Julia Wesley, Program Analyst -**

Ms. Wesley has many years of hands-on experience in monitoring affordable housing projects for compliance with written project agreements. In this capacity, she has provided documents to developers/owners/property managers of subsidized housing units as well as homeowners. Upon receipt of annual and rent certifications for tenant households, she has reviewed information for compliance. In addition, Ms. Wesley has prepared subordination and reconveyance documentation and assisted in the qualification of households for rental assistance (TBRA).

**Kim Bogdan, TBRA Program Analyst –**

Ms Bogdan has gained experience in operating successful TBRA Program. In this capacity, she has evaluated household income for numerous program applicants to establish their eligibility and calculate amount of TBRA assistance based on the Part 5 (Section 8) income eligibility standards, as required. She has calculated the amount of assistance to be provided, based on the City's established program factors. She has prepared all necessary documentation to comply with HUD regulations.

**Bob Levin, Construction Manager –**

Mr. Levin is knowledgeable in cost estimation specification writing, construction management and contractor/borrower dispute resolution. He assumes the primary responsibility for conducting the initial property inspection, the preparation of the work specifications, cost estimates, and construction management activities, including compliance with the construction contract and program requirements.

Mr. Levin has served as a CHS Construction Manager for the past ten years. In this capacity, he has demonstrated through knowledge of construction methods, materials and practices.

Specifically, Mr. Levin has conducted inspections of single family and small to medium size multi-family properties with the focus on code deficiencies and energy efficiency. During the property inspection, he completes a HQS checklist/conditions assessment report that documents the deficiencies and whether or not a hazardous materials testing is necessary.

In addition, Mr. Levin generates “before” and “after” digital photographs of the work to be completed.

Mr. Levin has over twenty years of working experience as a code enforcement officer for the City of Oxnard (retired). In addition, Mr. Levin is a licensed general contractor in the State of California.

**Sylvia Chavez, Program Analyst –**

Ms. Chavez is knowledgeable about local building codes and ordinances relating to construction. Her hands-on experience extends to familiarity with building methods for construction and rehabilitation, building material quality and the principles and techniques of building inspection and structural rehabilitation.

Furthermore, she is well versed in community development program procedures and applicable Federal, State, and local laws, rules, and regulations regarding the CDBG and HOME Program administration.

Other staff members are available on an as-needed basis.

## **REFERENCES**

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Below is a list of references that serve to document our ability to provide professional support services for State and Federally-funded Program (CDBG and HOME Investment Partnerships), including reporting and program compliance activities.

### **CITY OF LONG BEACH**

Community Development Department  
Mr. Patrick Ure  
333 West Ocean Blvd.  
Long Beach, CA 90802  
(562) 570-6026

### **CITY OF CAMARILLO**

Community Development Department  
Ms. Oksana Buck  
601 Carmen Drive  
Camarillo, CA 93010  
(805) 388-5367

### **CITY OF ANAHEIM**

Community Development Department  
Mr. Stephan Stoewer  
201 South Anaheim Blvd., Suite 1003  
Anaheim, CA 92805  
(714) 765-4338



## **FEE SCHEDULE**

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CHS proposes an agreement in amount not to exceed Two Hundred Seventy Six Thousand Dollars (\$276,000) utilizing the following fees for CDBG and HOME Program Administration, support services and Home Improvement Program oversight as follows:

Consultant (Gayle Bloomingdale) - \$85.00 per hour

- Preparation of Federal Plans such as the Consolidated Plans, One Year Action Plans and Performance Reports
- On-site monitoring of sub-recipients
- Set-up and maintain activities on Federal I.D.I.S.
- Preparation of Environmental Review forms
- Prepare for HUD audits, maintain financial records
- Research, compile and present data and information as requested

Programs Manager (Anita Jones) - \$85.00 per hour

- Rent and Income certification for City affordable housing units
- Financial review of Developer records
- Prepare all reports, notices and documents
- Development of Annual Action Plan/CAPER
- Create and maintain on-site grant financial records
- Generate reports

Construction Manager (Bob Levin) - \$85.00 per hour

- Contact property owners
- Conduct HQS Inspections utilizing HUD Form 52580
- Document housing conditions with digital reports
- Prepare and submit inspection reports

TBRA Program Analyst (Kim Bogdan) - \$75.00 per hour

- Tenant-based Rental Assistance Program Administration

Program Analyst (Julia Wesley) - \$65.00 per hour

- Prepare Reconveyance and other documentation

Program Analyst (Sylvia Chavez) - \$65.00 per hour

- Qualify homeowners for assistance
- co-ordination of construction process
- prepare documentation

## Program Costs

Appraisal		\$ Market
Travel		\$ .55 per mile
Title insurance		\$ Market
Lead Hazard testing		\$ Market
Termite Inspection		\$ Market
Delivery	-	\$ Market

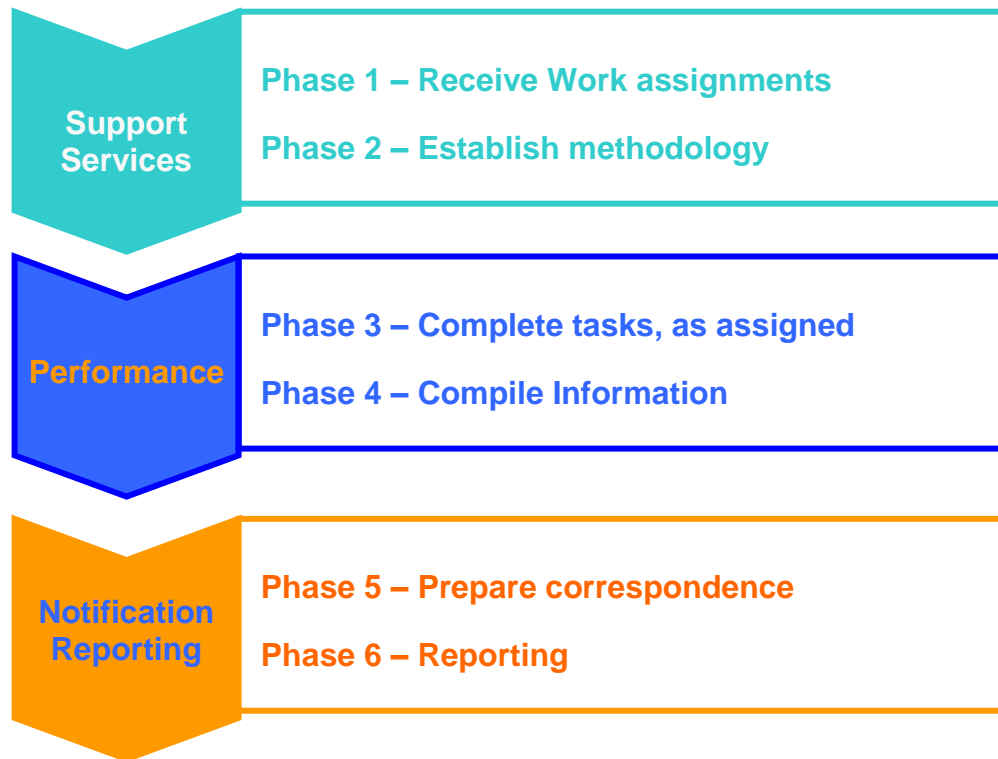
## TASK ESTIMATE –

Prepare One-year Action Plan - \$ 8,500.  
Prepare CAPER - \$8,500.  
Prepare the Consolidated Plan - \$15,000.  
CDBG/HOME Administration - \$30,000  
TBRA Administration - \$ 30,000  
Affordable Housing Compliance Monitoring - \$35,000.  
Residential Rehabilitation - \$66,000.

## CONCLUSION

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CHS utilizes a mix of communication and management tools that helps to minimize CHS staff time and the Client Agency's staff time as follows:



CHS strives to ensure that the administrative services provided by our company will support the City's efforts to administer State and Federally-funded affordable housing and community development programs.

By contracting with CHS, our Client Agencies have obtained the following benefits:

1. Knowledgeable and available staff that understand and are well versed in the requirements associated with the Community Development, Affordable Housing and Successor Agency Program administration.
2. Staff with specific CDBG Program and HOME Program technical experience and training.
3. Working with computerized management systems, developed specifically for Client Agencies.
4. A consulting staff that is available immediately to meet peak period program demands.
5. Full service consulting staff that is able to work on-site and off-site works with programs and activities.