

HOUSING AUTHORITY  
OF THE COUNTY OF TULARE

2009/2010

MOVING TO WORK ANNUAL PLAN

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Revised June 2009

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# SECTION 1

## INTRODUCTION

The Housing Authority of the County of Tulare is a medium sized Housing Authority located in Central California in a very conservative, agricultural area. The agency has been in existence since 1945, with a portfolio of programs funded through the U. S. Department of Housing and Urban Development, the U. S. Department of Agriculture, the State of California Department of Housing and Community Development, State of California Tax Credit Allocation Committee, and Locally funded housing. The HUD programs which fall under the jurisdiction of the Moving to Work Demonstration program are the Section 8 Housing Choice Voucher Program and the Public Housing Program. This plan for these programs covers a July 1, 2009 to June 30, 2010 fiscal year.

The Mission Statement for the Housing Authority is:

To provide affordable, well-maintained rental housing to qualified low and very low-income families. Priority shall be given to working families, seniors, and the disabled. Tenant self-sufficiency and responsibility shall be encouraged. Programs shall be self-supporting to the maximum extent feasible.

The Agency has been operating under a Moving to Work Demonstration Program Contract with the Department of Housing and Urban Development for the Section 8 and Conventional Public Housing Programs since May of 1999. Within the guidelines of this demonstration program the Agency has been able to streamline some of the operations under these two rental assistance programs while creating greater housing choices for families, and encouraging those families to achieve self-sufficiency. The demonstration program has been the ideal opportunity for the Agency to achieve its mission. With the execution of an amended Moving to Work Agreement in February 2008, the Agency is looking forward to the opportunity of an additional ten years to further the mutual goals of the Agency and the MTW Program.

While we consider the MTW program in Tulare County to be successful, there were additional changes to the program we requested from HUD, which have been put on hold over the last few years. With the flexibility offered by the new agreement, the Agency is now implementing some of those changes to further streamline these programs and provide additional opportunities to create more housing choices for participating families. These activities and previous ongoing activities are outlined in Section 7 Ongoing MTW Activities.

We believe that the greatest value of the MTW Program is to allow local agencies to provide assistance programs in ways that benefit the local jurisdiction and participants, and provides the flexibility to do so. We believe that the next nine years will continue to prove that the opportunity is valuable both for our Agency and the Demonstration Program.

## SECTION 2

## HOUSING STOCK INFORMATION

The Housing Authority of the County of Tulare currently owns 710 public housing units, and does not plan to change that number in the coming year by either increasing or decreasing units. Expected Capital expenditures are shown in Section 10, Sources and uses of Funding. All Public Housing and Section 8 Vouchers fall under the MTW Program.

Under the Housing Choice Voucher program the agency currently has 2,836 voucher allocations.

The Agency plans, for the first time, to implement a project-based component of the Housing Voucher program, if approved. Details of those plans are located in Section 6 Proposed MTW Activities.

The Housing Authority owns and/or manages a variety of additional rental units subsidized through various federal, state, and local programs. A chart of current additional units and program funding for them is attached.

The Agency, in partnership with Kaweah Management Company (a subsidiary Non-profit development company), has several new complexes in development. These new units are being developed using a combination of Tax Credits, HOME funds, City Redevelopment tax increment funding, bonds, and Housing Authority administrative funds. At this time, we anticipate that in the 2009/2010 fiscal year, the construction of 16 additional tax credit units in the City of Farmersville will be completed, we will acquire funding to rehabilitate an 11 unit complex in the City of Visalia with hopes of building an additional 9 units on the site, and construction will start on a 73 unit senior tax credit complex in the City of Lindsay, a 57 unit tax credit single family complex and a 60 unit multifamily complex (both in the City of Tulare), and a 56 unit multifamily tax credit complex in the City of Dinuba.

The Housing Authority is exploring additional projects for the future.

## SECTION 3

## LEASE UP INFORMATION

At this time, we see no impediment to leasing all 710 public housing units during the coming year, other than normal turnover. Timing out public housing residents under the MTW program has created additional turnover, but those issues have been worked out over the past four years and are now part of our normal operations. We do not plan any demolition, disposition, or major rehabilitation activities which would reduce occupancy.

Under our Housing Choice Voucher program, we have been averaging at 100% lease-up rate of our 2836 allocations, and anticipate that the rate will continue. While mortgage foreclosures have created a few new problems, in general, the issue has loosened the housing market in this area and is starting to drop rental prices. We anticipate that this will only help our Section 8 program.

## SECTION 4

## WAITING LIST INFORMATION

There are currently 6321 families on our public housing waiting lists. The agency has four waiting lists for public housing, for our four main geographical areas where we have our four area offices. There may be some duplication of names as families may be on more than one list at a given time. There are currently 11,528 families on the one Section 8 waiting list. As families' names reach the top of that list, they are referred to whichever of our offices is closest to their home, for updating. The waiting lists, depending on priority are, at the most, three years long for residents of Tulare Co.

All of our waiting lists are currently open and have been open for the past two decades. Because we are terminating assistance for families on both our public housing and Section 8 programs due to our time limits, the lists are moving and we do not anticipate having to close any of them. This also means that we are continuously updating applicants for housing, and therefore are also continuously purging the waiting lists. Mass purges have not proved be necessary.

## SECTION 5

## LONG-TERM MTW PLAN

For the next nine years, the main focus for this agency is to continue to pursue our efforts to make our MTW contract permanent. We believe that our program has been very successful as currently structured, and has stood the test of time. We believe that to have to revert to the standard Public Housing and Section 8 programs in the future would be unfair to those families we have already timed out of our programs, and would be a step backwards in providing assistance to our residents. We are now only seeking to streamline the programs for participants so that we can further meet the MTW goals.

At this time, as an MTW agency, we would like to remain exempt from the Section 8 Program SEMAP provisions. At this time, we would also like to continue to participate in the PHAS scoring process in order to retain our “High Performer” status. However, we would like to retain the option to review, and possibly change, that decision whenever the new PHAS scoring system is released.

We believe that local discretion is the best way to meet the needs of our jurisdiction, and also for other jurisdictions. We will also continue to look for ways to streamline our programs to further meet the MTW goals and better serve our constituents.

## SECTION 6

## PROPOSED MTW ACTIVITIES

For the 2009-2010 MTW fiscal year, the Housing Authority plans to Project-base Housing Choice Vouchers for the first time. To initiate this use of Housing Choice Vouchers, the agency plans to start with one project, with a maximum of 30 units, in conjunction with the City of Tulare Redevelopment Agency. A copy of the Project-based selection Plan is attached as Appendix 3. Waivers of 24 C.F.R. 983.51 and 983.57 are being requested, including HUD approval of the Selection Plan. The MTW objective of this plan is to increase housing choices in the City of Tulare which has not significantly increased multifamily housing stock in the last decade. The number of Section 8 contracts in the City has steadily decreased in the last few years from over 500 contracts to the current 386 contracts. This would be the baseline number, and a project-based component would seek to increase that number in the next 18 months, rather than have it further decline. We anticipate that all 30 units will be leased by the end of 2010 so the increase in units in Tulare would show on the 2011 annual report. The homeownership portion of this project will not be implemented until year 15 of the complex and therefore will not affect family self-sufficiency other than through the regular MTW policies of time limits and fixed subsidies. The fixed subsidies for the families living in the project based units will, however, mean that there will be no additional costs incurred for the Section 8 Program overall as opposed to regular Housing Choice Vouchers. This provision is included in Part IX.B Tenant Rent to Owner of the Project basing policy. This change is authorized under Attachment C, Sections D(1).e and D 7.

Another change requested would be to transition families who began participating in the Housing Authority Public Housing and Section 8 programs prior to May 1, 1999, who are not designated as elderly or disabled families, to the MTW program. There are currently 99 such families who have not left the program or voluntarily changed over to the MTW Program. It was hoped that there would no longer be any families in this category after 10 years. However, because we truly feel that the MTW model is working for our other current MTW participants, these families also need to be encouraged to go to work and become self-sufficient. This would also help the agency achieve administrative cost savings because there would be fewer families with rents calculated by formula as opposed to set rents or subsidies. With a five year time limit, we would hope that an additional 20% of the non-working families would have income from gainful employment each year for the five years they would remain on the program. Overall, income increases for these families would be expected to keep pace with the income increases for other MTW families as discussed in the ONGOING MTW ACTIVITIES. Hardships for these families would be tracked along with other MTW family hardship requests and are shown on our MTW website. The annual report would show how many of these families request hardships and the decisions made by the Hardship Committee. These changes would be authorized under Attachment C of the Amended MTW Agreement titled Rent Policies and Term Limits and Eligibility of Participants, specifically Section C (11) for Public Housing and Section D (2), and Section D 2(a) and (d) for Section 8 which allows MTW agencies to set rents and define income. Of the 99 families in this category, 57 currently have some income from gainful employment which would be our baseline number. Our benchmark would be to have that number increase in

the future before those families time out, and to increase the income of all families in this category by more than the Social Security annual increase. We have on record the current types of income and total annual income of these families.

Financially, the HATC plans to utilize funding from Public Housing reserves, Capital Fund reserves, and Section 8 Program reserves. These funds will be used in partnership with Kaweah Management Company, a non-profit affiliate of the Agency, to help develop additional low income housing throughout the County. This will increase housing choices for low income families, including Section 8 Housing Choice Voucher holders.

Specific projects for which these funds will be utilized include The Tule Vista Housing Complex in Tulare previously mentioned under the Project Basing section of Proposed Activities. The Agency will be lending up to \$3,000,000 at 3% interest for a maximum of 18 years, secured by the property. The baseline for this activity would be the current number of Housing Authority and Kaweah Management owned units, to be increased by an additional 57 units by the end of 2010 would be the benchmark.

\$200,000 will be used by the Agency as matching funds for the Neighborhood Stabilization Program stimulus funds. This money will realize an additional \$7,500,000 to purchase foreclosed single and multifamily units throughout the County and put them under deed restrictions for low income housing. If the application for the NSP program is successful, an additional 50 housing units would be available for low-income families by the end of 2010. The baseline for this activity would be the current number of Housing Authority and Kaweah Management owned units, to be increased by an additional 20 units by the end of 2010 and 30 more units by the end of 2011 would be the benchmarks.

Kaweah Management Company and the HATC, in conjunction with the City of Tulare is planning on loaning \$950,000 to purchase 20 units in the City of Tulare which are in a redevelopment district and rehab them. This would make currently substandard housing into standard, deed restricted affordable housing for low income families. The baseline for this activity would be the current number of Housing Authority and Kaweah Management owned units, to be increased by an additional 20 units of standard low income units by the end of 2009 as a benchmark.

Other projects may benefit from such funding in the future as money is available, and would be included in future HATC MTW plans.

These activities to Increase Housing Choices are authorized in Attachment C, Section B 2 allowing Partnerships with non-profit agencies.

## SUMMARY OF PLANNED MTW ACTIVITIES

ACTIVITY NAME	<u>Project Based Section 8</u>	<u>Transitioning Pre-1999 Families to MTW</u>
<b>MTW INITIATIVE DESCRIPTION</b>	Increase Housing Choices	Encouraging Families to Work
<b>MTW STATUTORY OBJECTIVE</b>	More Section 8 Contracts in the City of Tulare	Pushing families to become self-sufficient
<b>ANTICIPATED IMPACTS</b>	The number of Section 8 Contracts will stop declining	Families will have a time limit which will mean they cannot stay on assistance for a lifetime. They will need to prepare for the time when assistance will end
<b>BASELINES AND BENCHMARKS</b>	Currently 386 Contract in the City of Tulare	99 Pre-1999 able bodies families - currently with 57 having some income from employment.
<b>DATA COLLECTION METRICS AND PROTOCOLS</b>	Computer generated data of all Section 8 contracts in effect each year on July 1st in the census tracts located in the City limits of Tulare.	Computer generated data from verified family income at annual recertification compared to stored verified income data as of July 1, 2009.
<b>AUTHORIZATION CITED</b>	Section D (1) e, of Attachment C of the Amended and Restated MTW Agreement	Section C (11) and D (2) of Attachment C of the Amended and Restated MTW Agreement
<b>HARDSHIP POLICY</b>	NA	See Attached Policy

## SECTION 7

## ONGOING MTW ACTIVITIES

### I. SELF-SUFFICIENCY INITIATIVES

The Housing Authority of Tulare County at the beginning of the MTW program established fixed rent amounts for each of the bedroom sizes in the Public Housing program for the agency’s entire jurisdiction for non-elderly or disabled households. The goals for this policy were to simplify the program administration, take away the incentive for families to underreport income, and to encourage families to increase their income on their way to becoming self-sufficient. Several factors were analyzed to establish the set amounts. Those factors included actual per unit operating costs, Section 8 Program Fair Market rents, comparable rents, and what the rent burden would be for existing tenants at various rent levels. No utility allowances are deducted from the rent amounts for simplification and to mirror market conditions. During the ten years the MTW program has been in effect, rent levels have only been increased four times. The analysis to determine the amount of the increase includes actual operating costs, rent burden of existing tenants with the proposed increase, and turn around averages to determine how difficult it is to fill vacancies. The analysis also included the determination of whether the jurisdiction-wide rents by bedroom size are effective, which they have proven to be. Families with an elderly or disabled head or spouse have the option of choosing the MTW program with the fixed rent amount or an income based rent amount with no time limit.

<b>PUBLIC HOUSING</b>						
Bedrooms	0	1	2	3	4	5
MTW Flat Rent Amount	N/A	270	310	375	410	440
<b>VOUCHER</b>						
Bedrooms	0	1	2	3	4	5
MTW Subsidy Amount	270	300	350	530	600	630

The fixed subsidy amounts on the Section 8 Program were implemented for the same reasons as the flat rents for the Public Housing Program, i.e. simplification, to discourage “hidden income” and as an incentive for families to increase their incomes. Subsidies are based on the bedroom size for which the family qualifies. No utility allowances are used for the same reasons - simplification reasons and to mirror market conditions more closely. Factors used in setting the fixed subsidy amounts were the Program Fair Market Rents, rent burden for existing tenants, and the number of vouchers necessary to be issued in order to achieve lease up for all allocations. Ongoing analysis includes rent burden for existing tenants, number of vouchers issued to contracts ratio, and how long it takes for voucher holders to find a unit. Subsidy amounts have been increased five times in the ten years of the MTW Program. Again, families with an elderly or disabled head or spouse have the option of choosing the MTW fixed subsidy amount with the time limit or an income based rent amount with no time limit.

**Rent Burden as of 12/31/2008  
(Excluding households with ineligible non-citizens)**

<u>Program</u>	<u>30% and below</u>	<u>31% to 50%</u>	<u>Over 50%</u>
<b>Public Housing:</b>			
HUD Flat Rent	7	1	0
Income Based	187	0	0
Moving to Work	245	32	20
Total Tenants	439	33	20
<b>Section 8:</b>			
Income Based	655	155	18
Moving to Work	1,136	363	166
Total Tenants	1,791	518	184

At the same time that fixed rents and fixed subsidies were implemented, a five year time limit was imposed on non-elderly and non-disabled families. A time limit was imposed to work with the fixed subsidies and rents to give families a sense of urgency in working toward self-sufficiency. The time limit is not a lifetime limit. Families cannot be on the waiting list while they are receiving subsidy during the five years, but as soon as they have vacated or are no longer receiving subsidy, they can reapply and get back on the waiting list. The waiting lists remain open, and the current wait for Section 8 assistance is approximately three years. HATC is currently tracking the number of families who have been timed out and then reapply for any of the Agency's assistance programs. This information will be included in the annual reports. The five year time limit was chosen because that was the average length of stay. Those elderly or disabled families who choose the MTW Program with fixed rents or subsidies for whatever reason also have the time limit. Families with a time limit are given notice at each annual recertification as to how much time they have left, and where they can receive services such as job referrals or training, child care, budgeting, and credit counseling. After the five years is up, public housing families still in residence are given a 6 month notice to vacate their unit. As of this time, the Housing Authority has not had to go to court to evict any family when their time was up. Most families actually vacate prior to the end of the five years. Section 8 families and landlords are given a six month notice and a two month notice that their subsidy is about to terminate, and then it is up to the family and landlord to determine if they will enter into a market rent lease. Families on both programs whose income reaches 120% of median are given six months before subsidy terminates or they must move out prior to the five year limit.

The fixed rents, fixed subsidies, and the five year time limits were all implemented with the MTW objective of creating incentives for families to become economically self sufficient. These changes have allowed tenants to increase incomes without being penalized for that by having their rent raised. It has also allowed families to save money,

and for many families to have the money immediately, as opposed to in an escrow account. Families in the past under income-based rents have started jobs, then quit them immediately because the ensuing rent increase based on traditional rent calculation formulas actually left them with less income to live on. If a family can actually see the immediate benefit of additional income into the home, they tend to be more motivated. Families have used that money to purchase more reliable vehicles for transportation to and from work in many cases, or to repair bad credit scores which then facilitated qualifying for an open-market rental unit or mortgage to purchase a home. However, the time limits have also created a sense of urgency for families to take the steps to become self sufficient. Many of our families have told us that without the time limit, procrastination would have been easy and they would not have been pushed to achieve their goals. This has also moved the waiting list thereby creating the opportunity for us to assist more families.

Unintended consequences of these changes could be families evicted from either Public Housing or Section 8 because they cannot pay their rent due to changes in family circumstances. We do look at rent burden quarterly and use that information to evaluate where we set rent and subsidy levels, and we do have the information as to reasons why Public Housing families are evicted. However, we have tried to track such evictions in the Section 8 Program and have been unable to get reliable data as the landlords do not give it to us.

The HATC collects and stores verified income and savings information in a database for all MTW participants at the onset of their rental assistance for both the Public Housing and Section 8 Programs, and at each annual recertification thereafter. We will use that data as our baselines for the fixed rents, fixed subsidies, and time limits portions of our ongoing activities, combined. With this information, we can track any increases or decreases in incomes for participating families. For benchmarks, the HATC will compare annual income data with data from the Housing Authorities of the City and County of Fresno. That agency has agreed to keep data for its Public Housing and Section 8 participants that is comparable to that kept by the HATC which we believe will demonstrate that MTW participants have greater income increases and more gainful employment because they have been motivated to work toward achieving self sufficiency.

The data that both agencies will collect and compare will be for non-elderly and non-disabled families who have had at least one annual review. This data will include the income totals for each year for each family member by source. The income data as of September 1, 2009 for both agencies will be the baseline. Then, as of September 1, 2010 and each year thereafter, the database for the Fresno agencies will be compared to that from the HATC to see how many families have additional gainful employment, or conversely, less; and whether there is an overall income increase for tenant families. We believe that the MTW families will have greater increases in both areas and this will be the benchmark each year.

We believe this comparison will be valid as the resident profiles and economic opportunities for both agencies are similar. Both counties derive a large portion of their income from agriculture, with Fresno County being the largest agricultural income producer in the county, and Tulare County coming in as the second largest. The only major difference between the agencies will be the MTW approach that the HATC is currently using. Appendix D shows comparable census income data, State unemployment statistics for both counties, and HUD income limits for both counties.

These MTW activities are authorized in the Amended Agreement in Attachment C for Public Housing in Section C, 11 Rent Policies and Term Limits, and for Section 8 in Section D,(2) a, also called Rent Policies and Term Limits. The Hardship policy for these provisions is located in Section 9 of this plan.

## II. ADMINISTRATIVE COST SAVING CHANGES

The Housing Authority of the County of Tulare has implemented several Administrative changes over the last eleven years that impact efficiency and save on overall costs. These changes include:

1. Fixed proration amounts for mixed families for each non-eligible family member
2. Phasing out of the FSS Program
3. Requiring Section 8 landlords to use the HUD Model Lease
4. Changing the definition of income to include “all income into the home of all tenant families” under Section 8 and Public housing.
5. An actual minimum rent amount of \$0 instead of a minimum TTP amount from which a utility allowance is deducted.
6. Allowing a “flat” or fixed medical deduction amount of \$500 for qualified families who choose not to have to go through an extensive medical expense verification process.
7. Changing approximately 90 families to the MTW fixed subsidies and time limits who are not elderly or disabled, and who began Section 8 assistance in Tulare County after May 1999 when the MTW program began.

During the first three years of the MTW Program, the HATC chose to phase out our Family Self Sufficiency Program for the Section 8 Program. There had not been a Public Housing component. Most of the FSS participants had chosen to switch to the MTW Program because they could have their rent savings immediately to use for better transportation or to fix bad credit. Because the MTW Program was more popular with families, there was no reason to offer the FSS program. As a result, no new families were enrolled in the FSS Program, and the contracts for existing participants expired.

The HATC also chose to require that Section 8 landlords use the Program model lease rather than be able to use their own lease. In part this was to achieve the MTW objective of saving costs by streamlining the program so that staff would not have to scrutinize each landlord’s lease for prohibited provisions, but to also standardize lease terms for one year. In limiting participants to a five year time limit, there have been some challenges

when tenants move from one unit to another. In limiting terms to a year as part of the model lease, except for a mutual termination agreement, it has helped to simplify tracking of the family's duration of participation.

As part of the rent simplification process, the HATC also changed the proration formula for mixed families who have some members who are not legally in this country. The regular formulas are extremely cumbersome, and in many cases, unfair depending on income and the number of legal vs. family members who are immigrants with non-eligible status. The HATC chose to add a flat \$25 to the fixed rent amount for Public Housing for every illegal resident family member. On the Section 8 Program a flat \$25 is deducted from the fixed subsidy amount for each illegal resident family member.

Changing the definition of income to include "all income into the home of all tenant families" under Section 8 and Public housing will eliminate verification of exclusions to income, and complicated calculations and tracking of timing of exclusions.

Using an actual minimum rent amount of \$0 instead of a minimum TTP amount from which a utility allowance is deducted will save time and the expense of sending checks to families with a UAP payment amount. While these numbers have been minimal, it will help with overall cost savings.

Allowing a "flat" or fixed medical deduction amount of \$500 for qualified families who choose not to have to go through an extensive medical expense verification process will save a large amount of time. With current privacy laws regarding medical records, it is becoming increasingly difficult to obtain the records necessary to verify prescribed medications, amounts taken, and amounts paid but not reimbursed by the varying insurance companies. In some cases, physicians and pharmacies are charging families to fill out the verification forms. Comparing records versus prescriptions is extremely time-consuming. However, if families have greater expenses than the flat deduction, they are given the option of continuing with the traditional verification and deduction process.

We are changing approximately 90 families to the MTW fixed subsidies and time limits who are not elderly or disabled, and who began Section 8 assistance in Tulare County after May 1999 when the MTW program began to the MTW program.

Families who ported into this jurisdiction have been given the choice of keeping the traditional income based rent with no time limit or switching to MTW. They are now being changed over to the MTW Program.

Families who had a qualifying elderly or disabled head of house were given the choice of MTW or the traditional program. However, in some cases, the qualifying head of house is no longer in the home and all adults are now able bodied.

Families who had enhanced vouchers who have moved to a different complex were given the choice of MTW or the traditional program. Families who started receiving assistance through the Welfare to Work program were given the choice of MTW or the traditional program when the Welfare to Work program was disbanded.

Tracking all of these families has created difficulties determining which families have time limits, and how their rent should be calculated for the tenant population as a whole. In some cases it has led to errors and has created administrative issues. At their next regularly scheduled reexamination following January 1, 2009, the four types of families designated above have been started on the MTW program with the fixed subsidy and a five year time limit. As other families entering the Section 8 program since 1999 from the waiting list were not given an option, we feel that these families should be treated similarly.

These activities are authorized in Attachment C, Section C, 11 Rent Policies for Public Housing, and Section D, 2 Rent Policies, and 2, b determining the content of rental agreements, and Section F.

In all instances, the MTW objective of these administrative changes is to achieve cost savings through time savings of the eligibility staff and, minimally, administrative staff. The ultimate outcome of such savings would allow for reduced staffing as these changes became effective, or to be able to handle additional requirements or add units with current staffing. We have already realized staff savings over the initial nine years. Unfortunately our records are not accurate enough to analyze those savings accurately other than to note that there has been a reduction in one complete eligibility clerk position. However, as of now, our baselines to evaluate time or cost savings are our staffing levels and costs for our HUD caseloads as of July 1, 2008. Those numbers include a total of 15.55 Full Time Equivalent eligibility workers, with a total cost for salaries and benefits of \$718,909, and an average case load of 228 families per clerk. Our benchmarks to show these time savings we will realize from the proposed changes are either a decrease in Full Time Equivalent staff, or a cost savings, after adjustment for cost of living increases, or, if no staffing reductions have taken place, if we have added additional units and the average caseload per clerk has increased.

These changes are being lumped together for baseline and benchmark purposes because this agency does not have the resources to track individual time savings for each measure without creating additional costs which would effectively eliminate any realized savings. Should consulting evaluators paid by non-agency resources choose to perform such an evaluation, we would be happy to cooperate.

### III. INCREASING HOUSING CHOICES INITIATIVE

The 40% rule for the Section 8 Housing Choice Voucher Program has been eliminated. This rule does not allow families paying an income based rent to rent a unit which would require the family to pay over 40% of their income. There are valid reasons why elderly and disabled families choose more expensive units including being closer to family or work, living in a safer neighborhood, or possibly one with better schools. Because of this regulation, elderly and disabled families were forced to choose between an income-based rent with no time limit, or the MTW program with a time limit in order to be able to rent

a unit that met their needs. This created problems for the Hardship Committee when these families were about to time out, and then requested to be able to remain on rental assistance. The MTW objective of eliminating this rule is to increase housing choices for elderly and disabled families so they are not forced to make a choice between a desirable unit and having their assistance time limited depending on the ruling of the Hardship committee. This change is authorized in Attachment C, Section D (2) a. Our baseline to evaluate the success of this change is the current 61 elderly or disabled families who have chosen the MTW program in order to lease a unit that was over 40% of their income. If this change is successful, our benchmarks will be a steadily decreasing number of elderly or disabled families choosing the MTW option for this reason and subjecting themselves to a time limit. If in the future, the Hardship Committee gives a “blanket” approval to those families to stay on the program now that incoming families no longer have to make such a choice, the benchmark baseline will change to monitoring that no additional families choose MTW for this reason.

## SUMMARY OF CURRENT MTW ACTIVITIES

<b>ACTIVITY NAME</b>	Fixed Public Housing Rents Fixed Section 8 Subsidies 5 Year Time Limit	Administrative Changes
<b>MTW INITIATIVE</b>	Incentive to families	Reduce Costs and achieve great cost effectiveness
<b>DESCRIPTION</b>	to become self-sufficient	
<b>ANTICIPATED IMPACTS</b>	Incomes of participating families will increase	Reduce staffing or allow current staff to handle more cases
<b>BASELINES AND BENCHMARKS</b>	Verified income of participating families at start of assistance and at each annual recertification	July 1, 2008 staffing levels and staffing costs
<b>DATA COLLECTION METRICS AND PROTOCOLS</b>	Computer database of each family's income at start of assistance compared to their income at each annual income recertification	Names, salaries and caseloads of all MTW Eligibility Workers
<b>AUTHORIZATION CITED</b>	Section C,11 for Public Housing and Section D(2)a for Section 8 in Attachment C of the Amended and Restated MTW Agreement	Section C,11 and D,2 of Attachment C, of the Amended and Restated MTW Agreement
<b>HARDSHIP POLICY</b>	See Appendix A	See Appendix A

## SUMMARY PAGE 2

<b>ACTIVITY NAME</b>	Elimination of 40% Rule
<b>MTW INITIATIVE DESCRIPTION</b>	Increase Housing Choices
<b>ANTICIPATED IMPACTS</b>	Reduce Number of elderly and disabled families on MTW
<b>BASELINES AND BENCHMARKS</b>	61 Families on MTW to rent unit over 40% of income
<b>DATA COLLECTION METRICS AND PROTOCOLS</b>	Family income vs rent amount at initial occupancy of unit
<b>AUTHORIZATION CITED</b>	Section D, (2) of Attachment C of the Amended and Restated MTW Agreement
<b>HARDSHIP POLICY</b>	This eliminates Hardship Requests

## SECTION 8

## SOURCES AND USES OF FUNDING

Enclosed are the budgets for our Section 8 and our Public Housing Programs, and our Capital Fund showing our proposed activities by development.

Also enclosed is a detailing of the combined sources and uses of funds projected for budget year 2009/2010.

The TCHA has the opportunity to participate with our 501 (c) (3) nonprofit corporation in helping to finance the development of a new 57 unit family Tax Credit project. The TCHA will be lending up to 3.9 million dollars to this project at 3% interest per year. The loan term would be for a maximum of 18 years. This loan will be secured by the property. The repayment of the funds is guaranteed by the Developer.

The Housing Authority anticipates the continued need to work with local Non-Profit and Private developers in order to advance the goals of providing additional affordable units throughout the county. With the loss of funds being felt by the local cities and the county, as well as shrinking redevelopment set-aside funds from the downturn in the local economy, the HATC will be continuing to use program reserve funds to provide GAP financing to facilitate new developments. These funds will come from the Public Housing reserves, Capital Fund reserves, as well as the Section 8 Housing Choice Voucher program reserves. The funds will be made secured as loans to the HATC, and will be repaid through the project operations usually as residual receipts payments.

The agency does not planning any disposition of units at this time.

# Operating Budget

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0026 (exp. 10/31/2009)

See page four for Instructions and the Public reporting burden statement

a. Type of Submission <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No.: _____		b. Fiscal Year Ending <b>06/30/2010</b>	c. No. of months (check one) <input checked="" type="checkbox"/> 12 mo. <input type="checkbox"/> Other (specify) _____	d. Type of HUD assisted project(s) 01 <input checked="" type="checkbox"/> PHA/IHA-Owned Rental Housing 02 <input type="checkbox"/> IHA Owned Mutual Help Homeownership 03 <input type="checkbox"/> PHA/IHA Leased Rental Housing 04 <input type="checkbox"/> PHA/IHA Owned Turnkey III Homeownership 05 <input type="checkbox"/> PHA/IHA Leased Homeownership
e. Name of Public Housing Agency / Indian Housing Authority (PHA/IHA) <b>HOUSING AUTHORITY OF TULARE COUNTY</b>				
f. Address (city, State, zip code) <b>5140 WEST CYPRESS, PO BOX 701, VISALIA, CA</b>				
g. ACC Number <b>SF-190</b>		h. PAS / LOCCS Project No. <b>CA39-P030-70495</b>		i. HUD Field Office <b>SAN FRANCISCO</b>
j. No. of Dwelling Units <b>710</b>	k. No. of Unit Months Available	l. No. of Projects <b>17</b>		

Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 19 PUM (2)	<input checked="" type="checkbox"/> Estimates <input type="checkbox"/> or Actual Current Budget Yr. 19 2009 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (to nearest \$10) (5)	PUM (6)	Amount (to nearest \$10) (7)
<b>Homebuyers Monthly Payments for</b>								
010	7710	Operating Expense						
020	7712	Earned Home Payments						
030	7714	Nonroutine Maintenance Reserve						
<b>040</b>	<b>Total</b>	<b>Break-Even Amount (sum of lines 010, 020, and 030)</b>						
050	7716	Excess (or deficit) in Break-Even						
060	7790	Homebuyers Monthly Payments - Contra						
<b>Operating Receipts</b>								
070	3110	Dwelling Rental		349.08	349.08	2,974,162		
080	3120	Excess Utilities						
090	3190	Nondwelling Rental		.35	.35	2,982		
<b>100</b>	<b>Total</b>	<b>Rental Income (sum of lines 070, 080, and 090)</b>		<b>349.43</b>	<b>349.43</b>	<b>2,977,144</b>		
110	3610	Interest on General Fund Investments		-105.40	36.85	314,000		
120	3690	Other Income		16.05	16.05	136,746		
<b>130</b>	<b>Total</b>	<b>Operating Income (sum of lines 100, 110, and 120)</b>		<b>260.08</b>	<b>402.33</b>	<b>3,427,890</b>		
<b>Operating Expenditures - Administration</b>								
140	4110	Administrative Salaries		46.30	48.20	410,695		
150	4130	Legal Expense		1.63	1.63	13,888		
160	4140	Staff Training		.00	1.17	10,000		
170	4150	Travel		1.20	1.20	10,224		
180	4170	Accounting Fees						
190	4171	Auditing Fees		.73	.73	6,220		
200	4190	Other Administrative Expenses		12.50	12.50	106,500		
<b>210</b>	<b>Total</b>	<b>Administrative Expense (sum of line 140 thru line 200)</b>		<b>62.36</b>	<b>65.44</b>	<b>557,527</b>		
<b>Tenant Services</b>								
220	4210	Salaries						
230	4220	Recreation, Publications and Other Services						
240	4230	Contract Costs, Training and Other						
<b>250</b>	<b>Total</b>	<b>Tenant Services Expense (sum of lines 220, 230, and 240)</b>						
<b>Utilities</b>								
260	4310	Water		23.30	24.24	206,524		
270	4320	Electricity		5.94	6.30	53,676		
280	4330	Gas		.50	.53	4,516		
290	4340	Fuel						
300	4350	Labor						
310	4390	Other utilities expense		24.75	25.99	221,435		
<b>320</b>	<b>Total</b>	<b>Utilities Expense (sum of line 260 thru line 310)</b>		<b>54.49</b>	<b>57.06</b>	<b>486,151</b>		

## HOUSING AUTHORITY OF TULARE COUNTY

2009/2010

Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 19____ PUM (2)	<input checked="" type="checkbox"/> Estimates <input type="checkbox"/> or Actual Current Budget Yr. 19 2009 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (to nearest \$10) (5)	PUM (6)	Amount (to nearest \$10) (7)
<b>Ordinary Maintenance and Operation</b>								
330	4410	Labor		43.37	40.32	343,492		
340	4420	Materials		40.39	46.00	391,920		
350	4430	Contract Costs		66.78	68.78	586,006		
<b>360</b>	<b>Total</b>	Ordinary Maintenance & Operation Expense (lines 330 to 350)		150.54	155.10	1,321,418		
<b>Protective Services</b>								
370	4460	Labor						
380	4470	Materials						
390	4480	Contract costs						
<b>400</b>	<b>Total</b>	Protective Services Expense (sum of lines 370 to 390)						
<b>General Expense</b>								
410	4510	Insurance		6.68	6.68	56,914		
420	4520	Payments in Lieu of Taxes		9.37	9.37	79,832		
430	4530	Terminal Leave Payments						
440	4540	Employee Benefit Contributions		40.27	40.27	343,098		
450	4570	Collection Losses		2.90	2.99	25,475		
460	4590	Other General Expense						
<b>470</b>	<b>Total</b>	General Expense (sum of lines 410 to 460)		59.22	59.31	505,319		
<b>480</b>	<b>Total</b>	Routine Expense (sum of lines 210, 250, 320, 360, 400, and 470)		326.61	336.91	2,870,415		
<b>Rent for Leased Dwellings</b>								
490	4710	Rents to Owners of Leased Dwellings						
<b>500</b>	<b>Total</b>	Operating Expense (sum of lines 480 and 490)		326.61	336.91	2,870,415		
<b>Nonroutine Expenditures</b>								
510	4610	Extraordinary Maintenance						
520	7520	Replacement of Nonexpendable Equipment		.00	3.52	30,000		COMPUTER
530	7540	Property Betterments and Additions						HARDWARE
<b>540</b>	<b>Total</b>	Nonroutine Expenditures (sum of lines 510, 520, and 530)		.00	3.52	30,000		
<b>550</b>	<b>Total</b>	Operating Expenditures (sum of lines 500 and 540)		326.61	340.43	2,900,415		
<b>Prior Year Adjustments</b>								
560	6010	Prior Year Adjustments Affecting Residual Receipts						
<b>Other Expenditures:</b>								
570		Deficiency in Residual Receipts at End of Preceding Fiscal Yr.						
<b>580</b>	<b>Total</b>	Operating Expenditures, including prior year adjustments and other expenditures (line 550 plus or minus line 560 plus line 570)		326.61	340.43	2,900,415		
590		Residual Receipts (or Deficit) before HUD Contributions and provision for operating reserve (line 130 minus line 580)		21.43	61.91	527,475		
<b>HUD Contributions</b>								
600	8010	Basic Annual Contribution Earned - Leased Projects-Current Year						
610	8011	Prior Year Adjustments - (Debit) Credit						
<b>620</b>	<b>Total</b>	Basic Annual Contribution (line 600 plus or minus line 610)						
630	8020	Contributions Earned - Op. Sub - Cur. Yr.(before year-end adj)		127.89	51.14	435,737		
640		Mandatory PFS Adjustments (net)						
650		Other (specify)						
660		Other (specify)						
670		Total Year-end Adjustments/Other (plus or minus lines 640 thru 660)						
680	8020	Total Operating Subsidy-current year (line 630 plus or minus line 670)		127.89	51.14	435,737		
<b>690</b>	<b>Total</b>	HUD Contributions (sum of lines 620 and 680)		127.89	51.14	435,737		
700		Residual Receipts (or Deficit) (sum of line 590 plus line 690) Enter here and on line 810		149.32	113.05	963,212		

Name of PHA / IHA	Fiscal Year Ending
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Operating Reserve		PHA/IHA Estimates	HUD Modifications
<b>Part I - Maximum Operating Reserve - End of Current Budget Year</b>			
740	2821 PHA / IHA-Leased Housing - Section 23 or 10(c) 50% of Line 480, column 5, form HUD-52564		

Part II - Provision for and Estimated or Actual Operating Reserve at Fiscal Year End			
780	Operating Reserve at End of Previous Fiscal Year - Actual for FYE (date)		
790	Provision for Operating Reserve - Current Budget Year (check one) <input type="checkbox"/> Estimated for FYE <input type="checkbox"/> Actual for FYE		
800	Operating Reserve at End of Current Budget Year (check one) <input type="checkbox"/> Estimated for FYE <input type="checkbox"/> Actual for FYE		
810	Provision for Operating Reserve - Requested Budget Year Estimated for FYE Enter Amount from line 700		
820	Operating Reserve at End of Requested Budget Year Estimated for FYE (Sum of lines 800 and 810)		
830	Cash Reserve Requirement - _____ % of line 480		

Comments

**PHA / IHA Approval** Name KEN KUGLER  
 Title EXECUTIVE DIRECTOR  
 Signature \_\_\_\_\_ Date 2/3/09

**Field Office Approval** Name \_\_\_\_\_  
 Title \_\_\_\_\_  
 Signature \_\_\_\_\_ Date \_\_\_\_\_

Public reporting burden for this collection of information is estimated to average 116 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

This information is required by Section 6(c)(4) of the U.S. Housing Act of 1937. The information is the operating budget for the low-income housing program and provides a summary of proposed/budgeted receipts and expenditures, approval of budgeted receipts and expenditures, and justification of certain specified amounts. HUD reviews the information to determine if the operating plan adopted by the PHA and the amounts are reasonable and that the PHA is in compliance with procedures prescribed by HUD. Responses are required to obtain benefits. This information does not lend itself to confidentiality.

## Instructions for Preparing Form HUD-52564, Operating Budget

Separate Operating Budgets must be prepared for each separate Annual Contributions Contract (ACC). However, the supporting documentation can be combined for each Turnkey III project within an ACC, provided it clearly separates the cost by program and/or ACC number. Prepare all of the supporting documentation (Forms HUD-52573, HUD-52566 and HUD-52571) prior to finalizing the Operating Budget.

The headings for items a. through m. are self-explanatory.

### Columns:

Column (2): Obtain actual P.U.M. amounts from the Statement(s) of Operating Receipts and Expenditures (Form HUD-52599) for the year preceding the current budget year.

Column (3): Include the actual (if available) or estimated PUM amounts for the current budget year.

Columns (4) and (5): Enter amounts on applicable lines from HUD Schedules and/or HA worksheets in column (5). After completing column (5) compute the P.U.M. amounts for Column (4) by dividing each figure in Column (5) by the No. of Unit Months of Availability, item k.

Columns (6) and (7): Leave blank. If HUD modifies the HA estimates as a condition for approval, HUD will complete these columns and return a copy to the HA.

### Line Items

Lines 010 through 060 are specific to the Turnkey III Owned Homeownership Program. These lines correspond to accounts 7710 through 7790, see Accounting Handbook 7510.1.

Line 460: Use this line, if applicable, for showing estimated interest on Administrative and Sundry Loans.

Line 490: This line is specific to the Section 23, Leased Rental Program.

Line 560: Use this line, if applicable, only in connection with budget revisions.

Line 570: Use this line, if applicable, for such items as carry-overs of unabsorbed deficiencies in residual receipts from prior years.

Line 630: Operating Subsidy Eligibility for the requested year before year end adjustments.

Lines 640 to 660: Year end adjustments to be funded in the requested budget year.

Line 700: An estimated decrease cannot be more than the amount available in the operating reserve at the beginning of the requested budget year (line 800).

### Special Instructions, Budget Revisions

Budget revisions must be approved by the end of the PHA fiscal year.

When using this form for budget revisions, the following additional instructions are applicable:

No changes are to be made to Column (2) or Column (3).

No changes are to be made in the amount for Operating Subsidy Eligibility before year end adjustments (Line 630, or in Part I - Maximum Operating Reserve-End of Current Budget Year.

### Operating Reserves

Operating reserves are calculated by individual Annual Contributions Contract except that the operating reserves for Section 23 Leased Housing Projects, Turnkey III Homeownership Projects (HA Owned or Leased) must be separately calculated and reported by project.

Line 780: Enter amount as of the last previous fiscal year (year preceding current budget year).

Line 790:

a. Enter estimated amount, if original budget, or actual amount, if revised budget.

b. Enter negative balance in parentheses. (The negative balance may not exceed the amount on line 780.)

Line 800: Enter sum of lines 780 and 790.

Line 810:

a. Enter estimated amount.

b. Enter negative balance in parentheses. (The negative balance may not exceed the amount on line 800.)

Line 820: Enter sum of lines 800 and 810.

Line 830: Enter percent of routine operating expenses (or minimum dollar amount) currently used by HUD as a performance measure to evaluate the cash requirements and/or operating reserve adequacy.

<b>Part I: Summary</b>					
<b>PHA Name:</b> Housing Authority of The County of Tulare		<b>Grant Type and Number</b> Capital Fund Program Grant No: CA39P03050109 Replacement Housing Factor Grant No: Date of CFFP: _____			<b>FFY of Grant:</b> 2009 <b>FFY of Grant Approval:</b>
<b>Type of Grant</b> <input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: ) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) <sup>3</sup>	333,457			
3	1408 Management Improvements	86,447			
4	1410 Administration (may not exceed 10% of line 21)	123,697			
5	1411 Audit	2,500			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	35,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	177,163			
10	1460 Dwelling Structures	728,920			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures	180,100			
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1492 Moving to Work Demonstration				
16	1495.1 Relocation Costs				
17	1499 Development Activities <sup>4</sup>				
18a	1501 Collateralization or Debt Service paid by the PHA				
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant: (sum of lines 2 – 19)	1,667,284			
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Activities				
23	Amount of line 20 Related to Security – Soft Costs				
24	Amount of line 20 Related to Security – Hard Costs				
25	Amount of line 20 Related to Energy Conservation Measures				

<sup>1</sup> To be completed for the Performance and Evaluation Report.  
<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.  
<sup>4</sup> RHF funds shall be included here.

<b>Part I: Summary</b>				
<b>PHA Name:</b> Housing Authority of The County of Tulare		<b>Grant Type and Number</b> Capital Fund Program Grant No. CA39P03050109 Replacement Housing Factor Grant No: Date of CFFP: _____		<b>FFY of Grant:</b> 2009 <b>FFY of Grant Approval:</b>
<b>Type of Grant</b>				
<input checked="" type="checkbox"/> Original Annual Statement		<input type="checkbox"/> Reserve for Disasters/Emergencies		<input type="checkbox"/> Revised Annual Statement (revision no: )
<input type="checkbox"/> Performance and Evaluation Report for Period Ending:		<input type="checkbox"/> Final Performance and Evaluation Report		
<b>Line</b>	<b>Summary by Development Account</b>	<b>Total Estimated Cost</b>		<b>Total Actual Cost<sup>1</sup></b>
		<b>Original</b>	<b>Revised<sup>2</sup></b>	<b>Obligated</b> <b>Expended</b>
<b>Signature of Executive Director</b>		<b>Date</b>	<b>Signature of Public Housing Director</b>	<b>Date</b>

Part II: Supporting Pages								
PHA Name: Housing Authority of The County of Tulare		Grant Type and Number Capital Fund Program Grant No: CA39P03050109 CFFP (Yes/ No): Replacement Housing Factor Grant No:			Federal FFY of Grant: 2009			
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
HA Wide	Operations	1406		333,457				
HA Wide	Management Improvements	1408		86,447				
HA Wide	Administration	1410		123,697				
HA Wide	Audit	1411		2,500				
HA Wide	Fees & Cost (Architect & Engineer)	1430		35,000				
HA Wide	Site Improvement (Landscape,	1450		177,163				
HA Wide	Dwelling Structures	1460		728,920				
HA Wide	Non Dwelling Structures	1470		180,100				

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>2</sup> To be completed for the Performance and Evaluation Report.







	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
1	<b>CAPITAL IMPROVEMENTS FOR LOW RENT AS SUBMITTED</b>				442000	443000	140210		140210																
2	<b>BY AREA MANAGERS FOR FISCAL YEAR 2009-2010</b>				materials	contract cost	Cap Fund 09		145007	145006	146001	146002	146003	146004	146005	146006	146009	146011	146013	146016	145019	146023	146024	146026	
3									landscaping	Fencing	Kitchen	bathroom	paint	carpet/tile	garage doors	doors	drapes	AC/Coolers	roofs	appliances	concrete/driv	siding	counter tops	Light fixtures	
4																									
5	<b>30-4</b>																								
6	Interior Paint @ move outs (5)	5,500.00	-		1650	3,850.00	-																		
7	Linoleum replace as needed	1,000.00	-				-				1,000.00														
8	Vanity - 30986 Ivy Road	800.00	-				-					800.00													
9	Refrigerators (2)	900.00	-				-														900.00				
10	Cooler - 30942 Rd 69	350.00	-				-											350.00							
11		8,550.00	-				-																		
12	<b>30-15</b>																								
13	Interior paint @ move outs (10)	13,500.00	-		4,050.00	9,450.00	-																		
14	Interior paint (3)	4,050.00	-				-						4,050.00												
15	Countertops (2)	2,400.00	-				-																		
16	Paint kitchen & Bath cabinet (1)	600.00	-				-					600.00												2,400.00	
17	Refrigerators (2)	900.00	-				-														900.00				
18	Ranges (1)	415.00	-				-														415.00				
19	Fences	5,400.00	-				-			5,400.00															
20	Seal Parking Area AC	1,600.00	-				-															1,600.00			
21		28,865.00	-				-																		
22	<b>30-16</b>																								
24	Truck lift gates for existing vehicle(1)	2,290.00	-		1,969.00	321.00	-																		
25	Interior paint @ moveouts (11)	13,750.00	-		4,125.00	9,625.00	-																		
26	Carpet @ moveouts (12)	13,200.00	-		6,600.00	6,600.00	-																		
27	Kitchen countertops (4)	4,800.00	-				-					4,800.00													
28	Parking Lot reseal - Houston & Burke	8,000.00	-				-														8,000.00			4,800.00	
29	Interior paint existing (1)	1,250.00	-				-						1,250.00												
30	Carpet on existing (2)	2,100.00	-				-							2,100.00											
31	replace countertop for wheelchair access	1,200.00	-				-																	1,200.00	
32	Refrigerators (4)	1,800.00	-				-														1,800.00				
33	Ranges (2)	830.00	-				-														830.00				
34	Water Heater (2)	600.00	-				-														600.00				
35			-				-																		
36		49,820.00	-				-																		
37	<b>30-19</b>																								
38	Interior paint @ Moveouts (12)	14,400.00	-		4,320.00	10,080.00	-																		
39	carpets @ Moveouts (8)	15,200.00	-		7,600.00	7,600.00	-																		
40	Replace fences & gares (1_)	2,000.00	-				-				2,000.00														
41	Garage doors replace (3)	2,100.00	-				-																		
42	replace tub surround (1)	2,000.00	-				-																		
43	replace linoleum (3)	3,000.00	-				-																		
44	Interior paint existing (5)	6,000.00	-				-																		
45	Cabinets 1735 S Burke Ct	1,500.00	-				-						1,500.00											1,500.00	
46	Windows (10)	900.00	-		900.00		-																		
47	carpets existing (8)	15,200.00	-				-																		
48	Roof (2)	20,000.00	-				-																		
49	Cabinets & Countertops/sinks	5,850.00	-				-																	5,850.00	
50	tub/shower combo	2,500.00	-				-					2,500.00													
51	Patio repair dry rot	1,500.00	-			1,500.00	-																		
52	Refrigerators (8)	3,600.00	-				-																		
53	Dishwashers (4)	800.00	-				-														3,600.00				
54	Ranges (2)	830.00	-				-														800.00				
55	Seal AC Driveway	2,500.00	-				-														830.00				
56			-				-															2,500.00			
57		99,880.00	-				-																		
58	<b>OFFICE</b>																								
60	Storage shed	3,000.00	-			3,000.00	-																		
61		3,000.00	-				-																		
62	<b>TOTALS VISALIA</b>																					<b>190,115.00</b>			

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
1	CAPITAL IMPROVEMENTS FOR LOW RENT AS SUBMITTED				442000	443000	140210		140210																
2	BY AREA MANAGERS FOR FISCAL YEAR 2009-2010				materials	contract cost	Cap Fund 09		145007	145006	146001	146002	146003	146004	146005	146006	146009	146011	146013	146016	145019	146023	146024	146026	
3								landscaping	Fencing	Kitchen	bathroom	paint	carpet/tile	garage doors	doors	drapes	AC/Coolers	roofs	appliances	concrete/driv	siding	counter tops	Light fixtures		
63																									
64	30-10																								
65	Site Sidewalk repair & replace	15,000.00	-				15,000.00																	15,000.00	
66	Construct new iron gates & Fence on H St Comple	10,000.00	-				10,000.00			10,000.00															
67	Tree trimming	5,000.00	-				5,000.00		5,000.00																
68	Range Hoods (10)	800.00	-				800.00																		
69	Replace drapes	5,500.00	-				5,500.00										5,500.00							800.00	
70	Refrigerators (8)	3,560.00	-				3,560.00																		3,560.00
71	Interior Paint @ move outs (13)	12,500.00	-			3,750.00	8,750.00																		
72	Ranges (6)	2,700.00	-				2,700.00																		2,700.00
73	Refrigerator seals (10)	375.00	-			375.00																			
74	Door locks	500.00	-				500.00										500.00								
75	Carpets replace @ move out (6)	8,000.00	-			4,000.00	4,000.00																		
76	replace Lav & Kitchen faucets (10)	500.00	-				500.00				500.00														
77	replace toilets (3)	400.00	-				400.00				400.00														
78	A/C & Heating units (3)	12,000.00	-				12,000.00																		
79	security door	250.00	-				250.00																		
80	Overlay garage Floor with concrete - Kern & F	10,762.50	-				10,762.50																		
81	AC Ramp for New Garage floor	2,000.00	-				2,000.00																		10,762.50
82	Replace Parking Area	6,500.00	-				6,500.00																		2,000.00
83	Raise Height of Garage doors	7,500.00	-				7,500.00																		6,500.00
84	AC Pavement in Alley - H St	9,400.00	-				9,400.00										7,500.00								
85		113,247.50	-																						9,400.00
86	30-12																								
87	Site sidewalk repair/replace	15,000.00	-				15,000.00																		15,000.00
88	Tree trimming	5,000.00	-				5,000.00		5,000.00																
89	Install new iron gates & fences @ N St complex	20,000.00	-				20,000.00			20,000.00															
90	Range hoods (10)	800.00	-				800.00																		
91	Drapes	4,500.00	-				4,500.00																		
92	Refrigerators (8)	3,560.00	-				3,560.00																		800.00
93	Interior paint (10)	11,500.00	-				11,500.00																		3,560.00
94	refrigerators seals (10)	350.00	-			350.00							11,500.00												
95	Re carpet @ Moveout (8)	12,000.00	-			6000	6,000.00																		
96	Replace Lav & Kitchen faucets (5)	350.00	-				350.00																		
97	Door locks	500.00	-			500.00																			
98	Ranges (6)	2,700.00	-				2,700.00																		
99	Toilets (3)	400.00	-				400.00																		
100	Coolers (2)	1,200.00	-				1,200.00																		
101	Garage doors (2)	1,700.00	-				1,700.00																		
102	Security doors (2)	250.00	-				250.00																		
103	ROOFS (23 requested approved 12, 11 on hold )	96,000.00	-				96,000.00																		
104		175,810.00	-																						
105	30-20																								
106	Tree trimming	9,000.00	-				9,000.00			9,000.00															
107	Site sidewalk repair & Replace	10,000.00	-				10,000.00																		10,000.00
108	Range hoods (10)	800.00	-				800.00																		
109	Refrigerators (8)	3,560.00	-				3,560.00																		800.00
110	Interior Paint (12) move outs	13,800.00	-			4140	9,660.00																		3,560.00
111	Ranges (8)	3,600.00	-				3,600.00																		
112	Carpets (6)	9,000.00	-				9,000.00																		3,600.00
113	Door locks	500.00	-				500.00																		
114	Dishwashers (7)	1,500.00	-				1,500.00																		
115	Replace Lav & Kitchen faucets (10)	500.00	-				500.00																		
116	Disposals (10)	1,000.00	-				1,000.00																		
117	Cabinets & Countertops	18,000.00	-				18,000.00																		
118	Toilets	400.00	-				400.00																		
119	Kitchen sinks (5)	500.00	-				500.00																		
120	A/C & Heating units (6)	24,000.00	-				24,000.00																		
121	Garage doors (3)	2,550.00	-				2,550.00																		
122	Exterior paint (6)	20,000.00	-				20,000.00																		
123	ROOFS (requested 15, approved 15)	120,000.00	-				120,000.00																		
124		238,710.00	-																						

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
1	CAPITAL IMPROVEMENTS FOR LOW RENT AS SUBMITTED				442000	443000	140210		140210																
2	BY AREA MANAGERS FOR FISCAL YEAR 2009-2010				materials	contract cost	Cap Fund 09		landscaping	Fencing	Kitchen	bathroom	paint	carpet/tile	garage doors	doors	drapes	AC/Coolers	roofs	appliances	concrete/driv	siding	counter tops	Light fixtures	
3																									
125	90-21																								
126	Tree Trimming	6,000.00	-				6,000.00		6,000.00																
127	Site Sidewalk repair&replace	10,000.00	-				10,000.00														10,000.00				
128	Toilets (3)	400.00	-				400.00					400.00													
129	Range hoods (7)	550.00	-				550.00														550.00				
130	Drapes	5,500.00	-				5,500.00										5,500.00								
131	Refrigerators (8)	3,560.00	-				3,560.00														3,560.00				
132	Recarpets (6)	9,000.00	-				9,000.00							9,000.00											
133	interior paint @ moveouts (12)	13,800.00	-		4140	9,660.00																			
134	Door locks	500.00	-				500.00									500.00									
135	Dishwashers (5)	1,200.00	-				1,200.00														1,200.00				
136	Replace Lav & Kitchen Faucets (10)	500.00	-				500.00					500.00													
137	carpets @ move outs (6)	9,000.00	-		4,500.00	4,500.00																			
138	Disposal (10)	750.00	-				750.00			750.00															
139	cabinets & countertops	12,000.00	-				12,000.00																12,000.00		
140	Ranges (8)	3,600.00	-				3,600.00														3,600.00				
141	Kitchen sinks (5)	500.00	-				500.00			500.00															
142	Replace A/C & Heating units (6)	24,000.00	-				24,000.00											24,000.00							
143	Garage doors (2)	1,700.00	-				1,700.00								1,700.00										
144	Exterior paint (5)	16,000.00	-				16,000.00						16,000.00												
145	Exterior siding (3)	20,000.00	-				20,000.00															20,000.00			
146	ROOFS (requested 11, approved 8, hold 3)	64,000.00	-				64,000.00											64,000.00							
147		202,560.00	-																						
148	TULARE OFFICE																								
150	New office phone system	2,000.00	-		2,000.00																				
152	New shredder	1,000.00	-		1,000.00																				
153	new electronic door chime	250.00	-			250.00																			
158	Gas Utility water pump	400.00	-			400.00																			
159	Pancake compressor	250.00	-			250.00																			
160	Gas pressure washer	500.00	-			500.00																			
161	new mower	800.00	-			800.00																			
162	Roto hammer drill	150.00	-			150.00																			
163	Pneumatic wheeled dolly (3)	225.00	-			225.00																			
164	Electric Drain Snake	1,500.00	-			1,500.00																			
165	Lift gates for service trucks (2)	4,580.00	-		3,938.00	642.00																			
166		11,655.00	-																						
167	TOTALS TULARE			741,982.50																					
168																									
169	90-1																								
170	Refrigerators (6)	2,000.00	-				2,000.00														2,000.00				
171	Ranges (4)	1,600.00	-				1,600.00														1,600.00				
172		3,600.00	-																						
173	90-2																								
174	Refrigerators (4)	1,600.00	-				1,600.00														1,600.00				
175	Ranges (3)	1,200.00	-				1,200.00														1,200.00				
176	Interior Electrical Panel (20)	14,000.00	-				14,000.00														14,000.00				
177	Fencing (20)	20,000.00	-				20,000.00		20,000.00																
178	Exterior lighting (20)	180,100.00	-				180,100.00																	180,100.00	
179		216,900.00	-																						
180	90-3																								
181	Refrigerators (6)	2,400.00	-				2,400.00														2,400.00				
182	Ranges (3)	1,200.00	-				1,200.00														1,200.00				
183		3,600.00	-																						
184	90-5																								
185	Refrigerators (10)	4,000.00	-				4,000.00														4,000.00				
186	Ranges (5)	2,000.00	-				2,000.00														2,000.00				
187		6,000.00	-																						

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
1	<b>CAPITAL IMPROVEMENTS FOR LOW RENT AS SUBMITTED</b>				442000	443000	140210		140210																
2	<b>BY AREA MANAGERS FOR FISCAL YEAR 2009-2010</b>				materials	contract cost	Cap Fund 09		145007	145006	146001	146002	146003	146004	146005	146006	146009	146011	146013	146016	145019	146023	146024	146026	
3					landscaping	Fencing	Kitchen	bathroom	paint	carpet/tile	garage doors	doors	drapes	AC/Coolers	roofs	appliances	concrete/driv	siding	counter tops	Light fixtures					
188	<b>90-7</b>																								
189	Refrigerators (5)	2,000.00	-	-	-	-	2,000.00													2,000.00					
190	Ranges (3)	1,200.00	-	-	-	-	1,200.00													1,200.00					
191		3,200.00																							
192	<b>90-8</b>																								
193	Screen doors (10)	1,000.00	-	-	-	-	1,000.00								1,000.00										
194	Refrigerators (3)	1,200.00	-	-	-	-	1,200.00													1,200.00					
195	Ranges (2)	800.00	-	-	-	-	800.00													800.00					
196		3,000.00																							
197	<b>90-11</b>																								
198	Refrigerators (1)	400.00	-	-	-	-	400.00													400.00					
199	Countertop stove (5)	2,000.00	-	-	-	-	2,000.00													2,000.00					
200	Exhaust hoods (5)	1,500.00	-	-	-	-	1,500.00													1,500.00					
201	Ovens (5)	2,500.00	-	-	-	-	2,500.00													2,500.00					
202		6,400.00																							
203	<b>OFFICE</b>																								
204	Remodel Lobby	3,000.00	-	-	-	3,000.00																			
206	Replace office light fixtures	800.00	-	-	800.00																				
207	Reseal parking lot	4,000.00	-	-			4,000.00														4,000.00				
208	Sump pumps for shop	250.00	-	-	250.00																				
209		8,050.00																							
210	<b>TOTALS DINUBA</b>		<b>250,750.00</b>																						
211																									
212	<b>90-17</b>																								
213	Carpet (6)	9,000.00	-	-	-	-	9,000.00							9,000.00											
214	Replace Stucco Overhang	6,500.00	-	-	-	-	6,500.00															6,500.00			
215	Ranges (4)	1,600.00	-	-	-	-	1,600.00																		
216	Refrigerators (5)	2,500.00	-	-	-	-	2,500.00													2,500.00					
217	Interior paint (10) moveouts	8,000.00	-	-	2,400.00	5,600.00																			
218	Countertops (5)	5,500.00	-	-	-	-	5,500.00																	5,500.00	
219	Drapes (25 prs.)	1,875.00	-	-	-	-	1,875.00										1,875.00								
220		34,975.00																							
221	<b>90-24</b>																								
222	Kitchen/Bath Floors (3)	3,600.00	-	-	-	-	3,600.00																		
223	Exterior paint (3)	4,500.00	-	-	-	-	4,500.00			3,600.00															
224	Drapes (20 prs.)	1,500.00	-	-	-	-	1,500.00																		
225	Carpet (10)	15,000.00	-	-	-	-	15,000.00							15,000.00											
226	Interior paint (10) moveouts	13,000.00	-	-	3,900.00	9,100.00																			
227	Ranges (5)	2,000.00	-	-	-	-	2,000.00																		
228	Refrigerators (5)	2,500.00	-	-	-	-	2,500.00													2,000.00					
229	Water heaters 40 gal (2)	800.00	-	-	-	-	800.00													2,500.00					
230	Closest doors (10)	10,000.00	-	-	-	-	10,000.00													800.00					
231	Countertops (5)	5,500.00	-	-	-	-	5,500.00																		
232	Dishwashers (3)	630.00	-	-	-	-	630.00														630.00				
233		59,030.00																							
234	<b>OFFICE</b>																								
235	navigator system	150.00	-	-	150.00																				
236	lift gates for service truck (1)	2,290.00	-	-	1,969.00	321.00																			
237	typewriter	350.00	-	-	350.00																				
238		2,790.00																							
239																									
240	<b>TOTALS PORTERVILLE</b>		<b>96,795.00</b>																						
241																									
242	Training for new computer system	10,000.00	-	-	-	10,000.00																			
243	Computer Hardware upgrade	30,000.00	-	-	-	30,000.00																			
244																									
245																									
246					109,301.00	124,159.00	1,086,182.50		25,000.00	57,400.00	8,700.00	7,600.00	63,300.00	62,300.00	15,550.00	13,000.00	18,875.00	125,550.00	236,000.00	94,795.00	94,762.50	26,500.00	56,750.00	180,100.00	
247																									
248					<b>1,319,642.50</b>	<b>1,319,642.50</b>			<b>1,086,182.50</b>																

	A	B	C	D	E	F	G
1			Housing Authority of the County of Tulare				
2			Site Budgets				
3			July 1, 2009 to June 30, 2010				
4							
5			CA030 000805 P	CA030 000810 P	CA030 000815 P	CA030 000817 P	
6			Totals, Low-Rent	DINUBA	TULARE	VISALIA	P'VILLE
7							
8	Family / Elderly		Family	Family	Family	Family	Family
9	Scattered Site?						
10	Age						
11	Recently Renovated?						
12	Units		710	195	205	199	111
13	Unit months available		8520	2340	2460	2388	1332
14	Average Bedroom Size						
15	% Occupancy		67%	66%	69%	65%	65%
16	Unit Months Occupancy		5686	1551	1705	1561	869
17	Unit Months Mod Vacancies		0				
18							
19	<b>REVENUE</b>						
20							
21	Dwelling Rentals		\$2,974,162	\$803,024	\$862,507	\$832,765	\$475,866
22	Excess Utilities		\$0				
23	Non-dwelling Rentals		\$2,982	\$805	\$865	\$835	\$477
24	Non-Utility Subsidy		\$0				
25	Utility Subsidy		\$0				
26	Add-on Subsidies		\$0				
27	Proration (unfunded)		\$0				
28	Transfer from Capital Fund (1406)		\$0				
29	Transfer from Capital Fund (1408)		\$0				
30	Transfer from Central Office		\$0				
31	Investment Income		\$314,000	\$84,780	\$91,060	\$87,920	\$50,240
32	Other Income		\$374,865	\$102,956	\$108,236	\$105,068	\$58,606
33	<b>Total Revenue</b>		<b>\$3,666,009</b>	<b>\$991,565</b>	<b>\$1,062,668</b>	<b>\$1,026,588</b>	<b>\$585,189</b>
34							
35	<b>EXPENSES</b>						
36							
37	Administrative Salaries		\$416,517	\$115,547	\$125,422	\$103,879	\$71,668
38	Benefits		\$166,589	\$47,689	\$48,956	\$41,845	\$28,100
39	Legal		\$13,888	\$3,750	\$4,028	\$3,889	\$2,221
40	Staff Training		\$10,000	\$2,700	\$2,900	\$2,800	\$1,600
41	Travel		\$10,224	\$2,760	\$2,965	\$2,863	\$1,636
42	Audit		\$6,220	\$1,680	\$1,802	\$1,743	\$995
43	Telephone		\$0	\$0	\$0	\$0	\$0
44	Computer Support		\$0	\$0	\$0	\$0	\$0
45	Management Fee		\$0				
46	Bookkeeping Fee		\$0	\$0	\$0	\$0	\$0
47	Administrative Other		\$106,500	\$29,232	\$30,757	\$29,857	\$16,654
48	<b>Total Administrative</b>		<b>\$729,938</b>	<b>\$203,359</b>	<b>\$216,830</b>	<b>\$186,876</b>	<b>\$122,874</b>
49							
50	Resident Services Salaries		\$0	\$0	\$0	\$0	\$0
51	Benefits		\$0	\$0	\$0	\$0	\$0
52	Resident Services Materials		\$0				
53	Resident Services Contracts		\$0	\$0	\$0	\$0	\$0
54	<b>Total Tenant Services</b>		<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
55							
56	Gas		\$4,516	\$1,219	\$1,310	\$1,264	\$723
57	Electric		\$53,676	\$14,493	\$15,566	\$15,029	\$8,588
58	Water		\$206,524	\$55,761	\$59,892	\$57,827	\$33,044
59	Sewer		\$221,435	\$59,787	\$64,216	\$62,002	\$35,430
60	Other		\$0				
61	<b>Total Utilities</b>		<b>\$486,151</b>	<b>\$131,260</b>	<b>\$140,984</b>	<b>\$136,122</b>	<b>\$77,785</b>
62							
63	Maintenance Salaries		\$358,783	\$94,588	\$99,049	\$114,114	\$51,032
64	Benefits		\$183,634	\$54,434	\$41,914	\$59,259	\$28,027
65	Maintenance Materials		\$423,272	\$105,818	\$105,818	\$105,818	\$105,818
66	Maintenance Contracts		\$586,006	\$158,222	\$169,942	\$164,082	\$93,760
67	Maintenance Fees HVAC/Plumbing		\$0				
68	Maintenance Service Fees Other		\$0				
69	Trash Removal		\$0				
70	<b>Total Maintenance</b>		<b>\$1,551,694</b>	<b>\$413,062</b>	<b>\$416,723</b>	<b>\$443,273</b>	<b>\$278,637</b>
71							
72	Security Labor		\$0				
73	Benefits		\$0				
74	Materials		\$0				
75	Contracts		\$0	\$0	\$0	\$0	
76	<b>Total Protective Services</b>		<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
77							
78	Insurance		\$56,914	\$15,632	\$16,433	\$15,952	\$8,898
79	PILOT		\$79,832	\$22,661	\$21,759	\$22,193	\$13,219
80	Bad Debt Expense		\$25,475	\$6,878	\$7,388	\$7,133	\$4,076
81	Extraordinary Maintenance		\$0	\$0	\$0	\$0	\$0
82	Prin and Interest - Energy Perf Contract		\$0	\$0	\$0	\$0	\$0
83	<b>Total General Expenses</b>		<b>\$162,221</b>	<b>\$45,171</b>	<b>\$45,580</b>	<b>\$45,278</b>	<b>\$26,193</b>
84							
85	<b>Total Expenses, excl. Asset</b>						

	A	B	C	D	E	F	G
1			Housing Authority of the County of Tulare				
2			Site Budgets				
3			July 1, 2009 to June 30, 2010				
4							
5			CA030 000805 P	CA030 000810 P	CA030 000815 P	CA030 000817 P	
6			Totals, Low-Rent	DINUBA	TULARE	VISALIA	P'VILLE
7							
86	Management		\$2,930,005	\$792,851	\$820,116	\$811,549	\$505,488
87							
88							
89	Asset Management		\$0	\$0	\$0	\$0	\$0
90							
91	Total Expenses		\$2,930,005	\$792,851	\$820,116	\$811,549	\$505,488
92							
93							
94							
95	Cash Flow from Operations		\$736,004	\$198,713	\$242,552	\$215,038	\$79,700
96							
97							
98							
99			Administrative Salaries				
100	Site Manager		80,127	20,220	19,642	18,312	21,953
101	Management Aide		15,709		15,709	0	
102	Clerk #1		70,959	29,832	11,979	14,038	15,110
103	Clerk #2		7,369		7,369	0	
104	Clerk #3		11,515	4,703	6,812		
105	Receptionist		9,489			9,489	
106	Centralized Intake Specialist #1		0				
107	Centralized Intake Specialist #2		0				
108	Indirect Salaries		221,349	60,793	63,911	62,040	34,605
109							
110	Total Admin Salaries		416,517	115,547	125,422	103,879	71,668
111							
112	Total Per Unit Per Month		48.89	49.38	50.98	43.50	53.80
113							
114							
115			Benefits				
116	Administrative Benefits		83,468	24,860	24,956	18,547	15,105
117	Indirect Benefits		83,121	22,829	24,000	23,297	12,995
118	Labor Benefits		207,905	54,434	58,318	65,258	29,895
119			0				
120			0				
121			0				
122							
123			374,494	102,123	107,273	107,103	57,995
124							
125	Total Per Unit Per Month		43.95	43.64	43.61	44.85	43.54
126							
127							
128			Maintenance Salaries				
129	Maintenance Mechanic #1		0				
130	Maintenance Mechanic #2		0				
131	Maintenance Mechanic #3		0				
132	Maintenance Mechanic #4		0				
133	manuele		31,840			31,840	
134	yoshida		27,695			27,695	
135	menchaca		27,695			27,695	
136	Jimenez		26,885			26,885	
137	Melendez		27,695		27,695		
138	alfaro		23,845		23,845		
139	Rincon		31,840		31,840		
140	Weeks		34,025	34,025			
141	Ramirez		34,025	34,025			
142	Barragan		26,538	26,538			
143	Melo		27,293				27,293
144	Salazar		23,738				23,738
145	Torres		15,669		15,669		
146	Part Time Maintenance Worker #3		0				
147	Part Time Maintenance Worker #4		0				
148	Part Time Maintenance Worker #5		0				
149	Part Time Maintenance Worker #6		0				
150	Total Maintenance Salaries		358,783	94,588	99,049	114,114	51,032
151			0				
152	Total Per Unit Per Month		167	40.42	40.26	47.79	38.31
153							
154				312,258	331,744	325,097	180,695
155							

**Operating Fund  
Calculation of Operating Subsidy  
PHA-Owned Rental Housing**

**U.S. Department of Housing and  
Urban Development  
Office of Public and Indian Housing**  
  
OMB Approval No. 2577-0029 (exp. 05/31/2010)

Public Reporting Burden for this collection of information is estimated to average .75 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number. This information is required by Section 9(a) of the U.S. Housing Act of 1937, as amended, and by 24 CFR Part 990 HUD regulations. HUD makes payments for the operation and maintenance of low-income housing projects to PHAs/projects. The Operating Fund determines the amount of operating subsidy to be paid to PHAs/projects. PHAs/projects provide information on the Project Expense Level (PEL), Utilities Expense Level (UEL), Other Formula Expenses (Add-ons) and Formula Income – the major Operating Fund components. HUD reviews the information to determine each PHA's/project's Formula obligated for the Funding Period to each PHA/project based on the appropriation by Congress. HUD also uses the information as the basis for requesting annual appropriations from Congress. Responses to the collection of information are required to obtain a benefit. The information requested does not lend itself to confidentiality.

Enter Total Number of ACC Units for this PHA > > 710

<b>1. Name and Address of Public Housing Agency:</b> Tulare County Housing Authority 5140 W. Cypress Avenue Visalia, CA 93277		<b>2. Funding Period:</b> 01/01/2009 to 12/31/2009	
<b>4. ACC Number:</b>		<b>3. Type of Submission:</b> <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No.	
<b>5. Fiscal Year End:</b> <input type="checkbox"/> 12/31 <input type="checkbox"/> 03/31 <input checked="" type="checkbox"/> 06/30 <input type="checkbox"/> 09/30		<b>6. Operating Fund Project Number:</b> CA030000805	
<b>7. DUNS Number:</b> 000000000		<b>HUD Use Only</b>	
<b>8. ROFO Code:</b> 0000			

**Section 2**

**Calculation of ACC Units for 12-month period from July 1 to June 30 that is prior to the first day of the Funding Period:**

	ACC Units on 7/1/2007	Units Added to ACC (+)	Units Deleted from ACC (-)	ACC Units on 6/30/2008 (=)
Requested by PHA	195	0	0	195
HUD Modifications				

Line No.	Category	Column A Unit Months		Column B Eligible Unit Months (EUMs)		Column C Resident Participation Unit Months	
		Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.

**Categorization of Unit Months:**

**Occupied Unit Months**

01	Occupied dwelling units -- by public housing eligible family under lease	2,340		2,340		2,340	
02	Occupied dwelling units -- by PHA employee, police officer, or other security personnel who is not otherwise eligible for public housing					0	
03	New units -- eligible to receive subsidy during the Funding Period but not included on Lines 01, 02, or 05-13 of this section			0		0	
04	New units -- eligible to receive subsidy from 10/1 to 12/31 of previous funding period but not included on previous Calculation of Operating Subsidy			0		0	

**Vacant Unit Months**

05	Units undergoing modernization			0			
06	Special use units			0			
06a	Units on Line 02 that are occupied by police officers and that also qualify as special use units						
07	Units vacant due to litigation			0			
08	Units vacant due to disasters			0			
09	Units vacant due to casualty losses			0			
10	Units vacant due to changing market conditions			0			
11	Units vacant and not categorized above	11					

**Other ACC Unit Months**

12	Units eligible for asset repositioning fee and still on ACC (occupied or vacant)						
13	All other ACC units not categorized above						

<b>Calculations Based on Unit Months:</b>							
14	Limited vacancies			11			
15	<b>Total Unit Months</b>	2,351		2,351		2,340	
16	Units eligible for funding for resident participation activities (Line 15C divided by 12)					195	

<b>Special Provision for Calculation of Utilities Expense Level:</b>							
17	Unit months for which actual consumption is included on Line 01 of form HUD-52722 and that were removed from Lines 01 through 11, above, because of removal from inventory, including eligibility for the asset repositioning fee			0			

**Section 3**

Line No.	Description	Requested by PHA		HUD Modifications	
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**Part A. Formula Expenses**

**Project Expense Level (PEL)**

01	PUM project expense level (PEL)			\$407.77	
02	Inflation factor			1.04000	
03	PUM inflated PEL (Part A, Line 01 times Line 02)			\$424.08	
04	PEL (Part A, Line 03 times Section 2, Line 15, Column B)			\$997,012	

**Utilities Expense Level (UEL)**

05	PUM utilities expense level (UEL) (from Line 26 of form HUD-52722)			\$61.47	
06	UEL (Part A, Line 05 times Section 2, Line 15, Column B)			\$144,516	

**Add-Ons**

07	Self-sufficiency				
08	Energy loan amortization			\$0	
09	Payment in lieu of taxes (PILOT)			\$63,178	
10	Cost of independent audit			\$824	
11	Funding for resident participation activities			\$4,875	
12	Asset management fee <input type="checkbox"/> Eligible for an Asset Management Fee			\$9,404	
13	Information technology fee			\$4,702	
14	Asset repositioning fee				
15	Costs attributable to changes in federal law, regulation, or economy				
16	<b>Total Add-Ons</b> (Sum of Part A, Lines 07 through 15)			<b>\$82,983</b>	
17	<b>Total Formula Expenses</b> (Part A, Line 04 plus Line 06 plus Line 16)			<b>\$1,224,511</b>	

**Part B. Formula Income**

01	PUM formula income			\$338.97	
02	PUM change in utility allowances				
03	PUM adjusted formula income (Sum of Part B, Lines 01 and 02)			\$338.97	
04	<b>Total Formula Income</b> (Part B, Line 03 times Section 2, Line 15, Column B)			<b>\$796,918</b>	

**Part C. Other Formula Provisions**

01	Moving-to-Work (MTW)				
02	Transition funding		0.00	\$0	
03	Other				
04	<b>Total Other Formula Provisions</b> (Sum of Part C, Lines 01 through 03)			<b>\$0</b>	

**Part D. Calculation of Formula Amount**

01	Formula calculation (Part A, Line 17 minus Part B, Line 04 plus Part C, Line 04)			\$427,593	
02	Cost of independent audit (Same as Part A, Line 10)			\$824	
03	Formula amount (Greater of Part D, Lines 01 or 02)			\$427,593	

**Part E. Calculation of Operating Subsidy (HUD Use Only)**

01	Formula amount (Same as Part D, Line 03)				
02	Adjustment due to availability of funds				
03	HUD discretionary adjustments				
04	<b>Funds Obligated for Period</b> (Part E, Line 01 minus Line 02 minus Line 03) Appropriation symbol(s):				

**Section 4**

Remarks (provide section, part and line numbers):

*(This area is currently blank and highlighted in yellow.)*

**Section 5**

**Certifications**

- In accordance with 24 CFR 990.215, I hereby certify that Tulare County Housing Authority is in compliance with the annual income reexamination requirements and that rents and utility allowance calculations have been or will be adjusted in accordance with current HUD requirements and regulations.
- In accordance with § 225 of Title II of Division K of the Consolidated Appropriations Act, 2008, Pub. L. 110-161 (approved December 26, 2007), I hereby certify that Tulare County Housing Authority has 400 or fewer units and has elected to transition to asset management.
- I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Signature of Authorized PHA Representative & Date:	Signature of Authorized HUD Representative & Date:
X	X

**Certification of Payments  
to Influence Federal Transactions**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

Applicant Name

Tulare County Housing Authority

Program/Activity Receiving Federal Grant Funding

Operating Subsidy CA 030000805

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

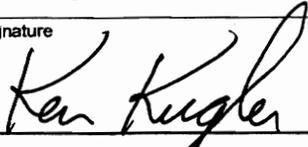
(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties.  
(18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official Ken Kugler	Title Executive Director
Signature 	Date (mm/dd/yyyy) 3-9-09

Previous edition is obsolete

form HUD 50071 (3/98)  
ref. Handbooks 7417.1, 7475.13, 7485.1, & 7485.3

**Operating Fund  
Calculation of Operating Subsidy  
PHA-Owned Rental Housing**

**U.S. Department of Housing and  
Urban Development  
Office of Public and Indian Housing**

OMB Approval No. 2577-0029 (exp. 05/31/2010)

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Enter Total Number of ACC Units for this PHA > > **710**

<b>1. Name and Address of Public Housing Agency:</b> Tulare County Housing Authority 5140 W. Cypress Avenue Visalia, CA 93277		<b>2. Funding Period:</b> 01/01/2009 to 12/31/2009
<b>4. ACC Number:</b>		<b>3. Type of Submission:</b> <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No.
<b>5. Fiscal Year End:</b> <input type="checkbox"/> 12/31 <input type="checkbox"/> 03/31 <input checked="" type="checkbox"/> 06/30 <input type="checkbox"/> 09/30	<b>6. Operating Fund Project Number:</b> CA030000810	
<b>7. DUNS Number:</b> 000000000	<b>HUD Use Only</b>	
<b>8. ROFO Code:</b> 0000		

**Section 2**

**Calculation of ACC Units for 12-month period from July 1 to June 30 that is prior to the first day of the Funding Period:**

	ACC Units on 7/1/2007	Units Added to ACC (+)	Units Deleted from ACC (-)	ACC Units on 6/30/2008 (=)
Requested by PHA	205			205
HUD Modifications				

Line No.	Category	Column A Unit Months		Column B Eligible Unit Months (EUMs)		Column C Resident Participation Unit Months	
		Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.

**Categorization of Unit Months:**

**Occupied Unit Months**

01	Occupied dwelling units -- by public housing eligible family under lease	2,460		2,460		2,460	
02	Occupied dwelling units -- by PHA employee, police officer, or other security personnel who is not otherwise eligible for public housing					0	
03	New units -- eligible to receive subsidy during the Funding Period but not included on Lines 01, 02, or 05-13 of this section			0		0	
04	New units -- eligible to receive subsidy from 10/1 to 12/31 of previous funding period but not included on previous Calculation of Operating Subsidy			0		0	

**Vacant Unit Months**

05	Units undergoing modernization			0			
06	Special use units			0			
06a	Units on Line 02 that are occupied by police officers and that also qualify as special use units						
07	Units vacant due to litigation			0			
08	Units vacant due to disasters			0			
09	Units vacant due to casualty losses			0			
10	Units vacant due to changing market conditions			0			
11	Units vacant and not categorized above	14					

**Other ACC Unit Months**

12	Units eligible for asset repositioning fee and still on ACC (occupied or vacant)						
13	All other ACC units not categorized above						

<b>Calculations Based on Unit Months:</b>							
14	Limited vacancies			14			
15	<b>Total Unit Months</b>	2,474		2,474		2,460	
16	Units eligible for funding for resident participation activities (Line 15C divided by 12)					205	

<b>Special Provision for Calculation of Utilities Expense Level:</b>							
17	Unit months for which actual consumption is included on Line 01 of form HUD-52722 and that were removed from Lines 01 through 11, above, because of removal from inventory, including eligibility for the asset repositioning fee			0			

**Section 3**

Line No.	Description	Requested by PHA	HUD Modifications
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**Part A. Formula Expenses**

**Project Expense Level (PEL)**

01	PUM project expense level (PEL)		\$380.48
02	Inflation factor		1.04000
03	PUM inflated PEL (Part A, Line 01 times Line 02)		\$395.70
04	PEL (Part A, Line 03 times Section 2, Line 15, Column B)		\$978,962

**Utilities Expense Level (UEL)**

05	PUM utilities expense level (UEL) (from Line 26 of form HUD-52722)		\$47.94
06	UEL (Part A, Line 05 times Section 2, Line 15, Column B)		\$118,604

**Add-Ons**

07	Self-sufficiency		
08	Energy loan amortization		\$0
09	Payment in lieu of taxes (PILOT)		\$66,417
10	Cost of independent audit		\$866
11	Funding for resident participation activities		\$5,125
12	Asset management fee <input type="checkbox"/> Eligible for an Asset Management Fee		\$9,896
13	Information technology fee		\$4,948
14	Asset repositioning fee		
15	Costs attributable to changes in federal law, regulation, or economy		
16	<b>Total Add-Ons</b> (Sum of Part A, Lines 07 through 15)		<b>\$87,252</b>
17	<b>Total Formula Expenses</b> (Part A, Line 04 plus Line 06 plus Line 16)		<b>\$1,184,818</b>

**Part B. Formula Income**

01	PUM formula income		\$315.20
02	PUM change in utility allowances		
03	PUM adjusted formula income (Sum of Part B, Lines 01 and 02)		\$315.20
04	<b>Total Formula Income</b> (Part B, Line 03 times Section 2, Line 15, Column B)		<b>\$779,805</b>

**Part C. Other Formula Provisions**

01	Moving-to-Work (MTW)		
02	Transition funding	0.00	\$0
03	Other		
04	<b>Total Other Formula Provisions</b> (Sum of Part C, Lines 01 through 03)		<b>\$0</b>

**Part D. Calculation of Formula Amount**

01	Formula calculation (Part A, Line 17 minus Part B, Line 04 plus Part C, Line 04)		\$405,013
02	Cost of independent audit (Same as Part A, Line 10)		\$866
03	Formula amount (Greater of Part D, Lines 01 or 02)		\$405,013

**Part E. Calculation of Operating Subsidy (HUD Use Only)**

01	Formula amount (Same as Part D, Line 03)		
02	Adjustment due to availability of funds		
03	HUD discretionary adjustments		
04	<b>Funds Obligated for Period</b> (Part E, Line 01 minus Line 02 minus Line 03) Appropriation symbol(s):		

**Section 4**

Remarks (provide section, part and line numbers):

**Section 5**

**Certifications**

- In accordance with 24 CFR 990.215, I hereby certify that Tulare County Housing Authority is in compliance with the annual income reexamination requirements and that rents and utility allowance calculations have been or will be adjusted in accordance with current HUD requirements and regulations.
- In accordance with § 225 of Title II of Division K of the Consolidated Appropriations Act, 2008, Pub. L. 110-161 (approved December 26, 2007), I hereby certify that Tulare County Housing Authority has 400 or fewer units and has elected to transition to asset management.
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Signature of Authorized PHA Representative & Date:	Signature of Authorized HUD Representative & Date:
X	X

**Certification of Payments  
to Influence Federal Transactions**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

Applicant Name

Tulare County Housing Authority

Program/Activity Receiving Federal Grant Funding

Operating Subsidy CA 030000810

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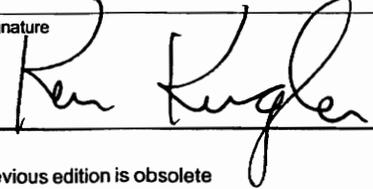
(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

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Name of Authorized Official Ken Kugler	Title Executive Director
Signature 	Date (mm/dd/yyyy) 3-9-09

Previous edition is obsolete

form HUD 50071 (3/98)  
ref. Handbooks 7417.1, 7475.13, 7485.1, & 7485.3

**Operating Fund  
Calculation of Operating Subsidy  
PHA-Owned Rental Housing**

**U.S. Department of Housing and  
Urban Development  
Office of Public and Indian Housing**

OMB Approval No. 2577-0029 (exp. 05/31/2010)

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Enter Total Number of ACC Units for this PHA > > 710

<b>1. Name and Address of Public Housing Agency:</b> Tulare County Housing Authority 5140 W. Cypress Avenue Visalia, CA 93277		<b>2. Funding Period:</b> 01/01/2009 to 12/31/2009
<b>4. ACC Number:</b>		<b>3. Type of Submission:</b> <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No.
<b>5. Fiscal Year End:</b> <input type="checkbox"/> 12/31 <input type="checkbox"/> 03/31 <input checked="" type="checkbox"/> 06/30 <input type="checkbox"/> 09/30	<b>6. Operating Fund Project Number:</b> CA030000815	
<b>7. DUNS Number:</b> 000000000	<b>HUD Use Only</b>	
<b>8. ROFO Code:</b> 0000		

**Section 2**

**Calculation of ACC Units for 12-month period from July 1 to June 30 that is prior to the first day of the Funding Period:**

	ACC Units on 7/1/2007	Units Added to ACC (+)	Units Deleted from ACC (-)	ACC Units on 6/30/2008 (=)
Requested by PHA	199			199
HUD Modifications				

Line No.	Category	Column A Unit Months		Column B Eligible Unit Months (EUMs)		Column C Resident Participation Unit Months	
		Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.

**Categorization of Unit Months:**

**Occupied Unit Months**

01	Occupied dwelling units -- by public housing eligible family under lease	2,388		2,388		2,388	
02	Occupied dwelling units -- by PHA employee, police officer, or other security personnel who is not otherwise eligible for public housing					0	
03	New units -- eligible to receive subsidy during the Funding Period but not included on Lines 01, 02, or 05-13 of this section			0		0	
04	New units -- eligible to receive subsidy from 10/1 to 12/31 of previous funding period but not included on previous Calculation of Operating Subsidy			0		0	

**Vacant Unit Months**

05	Units undergoing modernization			0			
06	Special use units			0			
06a	Units on Line 02 that are occupied by police officers and that also qualify as special use units						
07	Units vacant due to litigation			0			
08	Units vacant due to disasters			0			
09	Units vacant due to casualty losses			0			
10	Units vacant due to changing market conditions			0			
11	Units vacant and not categorized above	35					

**Other ACC Unit Months**

12	Units eligible for asset repositioning fee and still on ACC (occupied or vacant)						
13	All other ACC units not categorized above						

Calculations Based on Unit Months:					
14	Limited vacancies			35	
15	<b>Total Unit Months</b>	2,423		2,423	2,388
16	Units eligible for funding for resident participation activities (Line 15C divided by 12)				199

Special Provision for Calculation of Utilities Expense Level:					
17	Unit months for which actual consumption is included on Line 01 of form HUD-52722 and that were removed from Lines 01 through 11, above, because of removal from inventory, including eligibility for the asset repositioning fee			0	

**Section 3**

Line No.	Description	Requested by PHA	HUD Modifications
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**Part A. Formula Expenses**

**Project Expense Level (PEL)**

01	PUM project expense level (PEL)		\$377.65
02	Inflation factor		1.04000
03	PUM inflated PEL (Part A, Line 01 times Line 02)		\$392.76
04	PEL (Part A, Line 03 times Section 2, Line 15, Column B)		\$951,657

**Utilities Expense Level (UEL)**

05	PUM utilities expense level (UEL) (from Line 26 of form HUD-52722)		\$49.79
06	UEL (Part A, Line 05 times Section 2, Line 15, Column B)		\$120,641

**Add-Ons**

07	Self-sufficiency		
08	Energy loan amortization		\$0
09	Payment in lieu of taxes (PILOT)		\$64,474
10	Cost of independent audit		\$841
11	Funding for resident participation activities		\$4,975
12	Asset management fee <input type="checkbox"/> Eligible for an Asset Management Fee		\$9,692
13	Information technology fee		\$4,846
14	Asset repositioning fee		
15	Costs attributable to changes in federal law, regulation, or economy		
16	<b>Total Add-Ons</b> (Sum of Part A, Lines 07 through 15)		<b>\$84,828</b>
17	<b>Total Formula Expenses</b> (Part A, Line 04 plus Line 06 plus Line 16)		<b>\$1,157,126</b>

**Part B. Formula Income**

01	PUM formula income		\$301.07
02	PUM change in utility allowances		
03	PUM adjusted formula income (Sum of Part B, Lines 01 and 02)		\$301.07
04	<b>Total Formula Income</b> (Part B, Line 03 times Section 2, Line 15, Column B)		<b>\$729,493</b>

**Part C. Other Formula Provisions**

01	Moving-to-Work (MTW)		
02	Transition funding	0.00	\$0
03	Other		
04	<b>Total Other Formula Provisions</b> (Sum of Part C, Lines 01 through 03)		<b>\$0</b>

**Part D. Calculation of Formula Amount**

01	Formula calculation (Part A, Line 17 minus Part B, Line 04 plus Part C, Line 04)		\$427,633
02	Cost of independent audit (Same as Part A, Line 10)		\$841
03	Formula amount (Greater of Part D, Lines 01 or 02)		\$427,633

**Part E. Calculation of Operating Subsidy (HUD Use Only)**

01	Formula amount (Same as Part D, Line 03)		
02	Adjustment due to availability of funds		
03	HUD discretionary adjustments		
04	<b>Funds Obligated for Period</b> (Part E, Line 01 minus Line 02 minus Line 03) Appropriation symbol(s):		

**Section 4**

Remarks (provide section, part and line numbers):

*(This area is intentionally left blank for remarks.)*

**Section 5**

**Certifications**

- In accordance with 24 CFR 990.215, I hereby certify that Tulare County Housing Authority is in compliance with the annual income reexamination requirements and that rents and utility allowance calculations have been or will be adjusted in accordance with current HUD requirements and regulations.
- In accordance with § 225 of Title II of Division K of the Consolidated Appropriations Act, 2008, Pub. L. 110-161 (approved December 26, 2007), I hereby certify that Tulare County Housing Authority has 400 or fewer units and has elected to transition to asset management.
- I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Signature of Authorized PHA Representative & Date:    X	Signature of Authorized HUD Representative & Date:    X
---	---

# Certification of Payments to Influence Federal Transactions

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

Applicant Name

Tulare County Housing Authority

Program/Activity Receiving Federal Grant Funding  
Operating Subsidy CA 030000815

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties.  
(18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

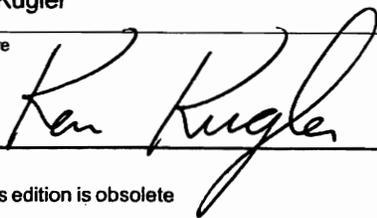
Name of Authorized Official

Ken Kugler

Title

Executive Director

Signature



Date (mm/dd/yyyy)

3-9-09

Previous edition is obsolete

form HUD 50071 (3/98)  
ref. Handbooks 7417.1, 7475.13, 7485.1, & 7485.3

**Operating Fund  
Calculation of Operating Subsidy  
PHA-Owned Rental Housing**

**U.S. Department of Housing and  
Urban Development  
Office of Public and Indian Housing**

OMB Approval No. 2577-0029 (exp. 05/31/2010)

Public Reporting Burden for this collection of information is estimated to average .75 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number. This information is required by Section 9(a) of the U.S. Housing Act of 1937, as amended, and by 24 CFR Part 990 HUD regulations. HUD makes payments for the operation and maintenance of low-income housing projects to PHAs/projects. The Operating Fund determines the amount of operating subsidy to be paid to PHAs/projects. PHAs/projects provide information on the Project Expense Level (PEL), Utilities Expense Level (UEL), Other Formula Expenses (Add-ons) and Formula Income – the major Operating Fund components. HUD reviews the information to determine each PHA's/project's Formula obligated for the Funding Period to each PHA/project based on the appropriation by Congress. HUD also uses the information as the basis for requesting annual appropriations from Congress. Responses to the collection of information are required to obtain a benefit. The information requested does not lend itself to confidentiality.

Enter Total Number of ACC Units for this PHA > > **710**

<b>1. Name and Address of Public Housing Agency:</b> Tulare County Housing Authority 5140 W. Cypress Avenue Visalia, CA 93277		<b>2. Funding Period:</b> 01/01/2009 to 12/31/2009
<b>4. ACC Number:</b>		<b>3. Type of Submission:</b> <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No.
<b>5. Fiscal Year End:</b> <input type="checkbox"/> 12/31 <input type="checkbox"/> 03/31 <input checked="" type="checkbox"/> 06/30 <input type="checkbox"/> 09/30	<b>6. Operating Fund Project Number:</b> CA030000817	
<b>7. DUNS Number:</b> 000000000	<b>HUD Use Only</b>	
<b>8. ROFO Code:</b> 0000		

**Section 2**

**Calculation of ACC Units for 12-month period from July 1 to June 30 that is prior to the first day of the Funding Period:**

	ACC Units on 7/1/2007	Units Added to ACC (+)	Units Deleted from ACC (-)	ACC Units on 6/30/2008 (=)
Requested by PHA	111			111
HUD Modifications				

Line No.	Category	Column A Unit Months		Column B Eligible Unit Months (EUMs)		Column C Resident Participation Unit Months	
		Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.	Req'd by PHA	HUD Mod.

**Categorization of Unit Months:**

**Occupied Unit Months**

01	Occupied dwelling units -- by public housing eligible family under lease	1,332		1,332		1,332	
02	Occupied dwelling units -- by PHA employee, police officer, or other security personnel who is not otherwise eligible for public housing					0	
03	New units -- eligible to receive subsidy during the Funding Period but not included on Lines 01, 02, or 05-13 of this section			0		0	
04	New units -- eligible to receive subsidy from 10/1 to 12/31 of previous funding period but not included on previous Calculation of Operating Subsidy			0		0	

**Vacant Unit Months**

05	Units undergoing modernization			0			
06	Special use units			0			
06a	Units on Line 02 that are occupied by police officers and that also qualify as special use units						
07	Units vacant due to litigation			0			
08	Units vacant due to disasters			0			
09	Units vacant due to casualty losses			0			
10	Units vacant due to changing market conditions			0			
11	Units vacant and not categorized above	25					

**Other ACC Unit Months**

12	Units eligible for asset repositioning fee and still on ACC (occupied or vacant)						
13	All other ACC units not categorized above						

<b>Calculations Based on Unit Months:</b>							
14	Limited vacancies			25			
15	<b>Total Unit Months</b>	1,357		1,357		1,332	
16	Units eligible for funding for resident participation activities (Line 15C divided by 12)					111	

<b>Special Provision for Calculation of Utilities Expense Level:</b>							
17	Unit months for which actual consumption is included on Line 01 of form HUD-52722 and that were removed from Lines 01 through 11, above, because of removal from inventory, including eligibility for the asset repositioning fee			0			

**Section 3**

Line No.	Description	Requested by PHA	HUD Modifications
----------	-------------	------------------	-------------------

**Part A. Formula Expenses**

<b>Project Expense Level (PEL)</b>			
01	PUM project expense level (PEL)	\$386.07	
02	Inflation factor	1.04000	
03	PUM inflated PEL (Part A, Line 01 times Line 02)	\$401.51	
04	PEL (Part A, Line 03 times Section 2, Line 15, Column B)	\$544,849	

<b>Utilities Expense Level (UEL)</b>			
05	PUM utilities expense level (UEL) (from Line 26 of form HUD-52722)	\$88.28	
06	UEL (Part A, Line 05 times Section 2, Line 15, Column B)	\$119,796	

<b>Add-Ons</b>			
07	Self-sufficiency		
08	Energy loan amortization	\$469	
09	Payment in lieu of taxes (PILOT)	\$35,963	
10	Cost of independent audit	\$469	
11	Funding for resident participation activities	\$2,775	
12	Asset management fee <input type="checkbox"/> Eligible for an Asset Management Fee	\$5,428	
13	Information technology fee	\$2,714	
14	Asset repositioning fee		
15	Costs attributable to changes in federal law, regulation, or economy		
16	<b>Total Add-Ons</b> (Sum of Part A, Lines 07 through 15)	<b>\$47,818</b>	
17	<b>Total Formula Expenses</b> (Part A, Line 04 plus Line 06 plus Line 16)	<b>\$712,463</b>	

<b>Part B. Formula Income</b>			
01	PUM formula income	\$312.84	
02	PUM change in utility allowances		
03	PUM adjusted formula income (Sum of Part B, Lines 01 and 02)	\$312.84	
04	<b>Total Formula Income</b> (Part B, Line 03 times Section 2, Line 15, Column B)	<b>\$424,524</b>	

<b>Part C. Other Formula Provisions</b>			
01	Moving-to-Work (MTW)		
02	Transition funding	0.00	\$0
03	Other		
04	<b>Total Other Formula Provisions</b> (Sum of Part C, Lines 01 through 03)		<b>\$0</b>

<b>Part D. Calculation of Formula Amount</b>			
01	Formula calculation (Part A, Line 17 minus Part B, Line 04 plus Part C, Line 04)	\$287,939	
02	Cost of independent audit (Same as Part A, Line 10)	\$469	
03	Formula amount (Greater of Part D, Lines 01 or 02)	\$287,939	

<b>Part E. Calculation of Operating Subsidy (HUD Use Only)</b>			
01	Formula amount (Same as Part D, Line 03)		
02	Adjustment due to availability of funds		
03	HUD discretionary adjustments		
04	<b>Funds Obligated for Period</b> (Part E, Line 01 minus Line 02 minus Line 03) Appropriation symbol(s):		

**Section 4**

Remarks (provide section, part and line numbers):

*(This area is currently blank and highlighted in yellow.)*

**Section 5**

**Certifications**

- In accordance with 24 CFR 990.215, I hereby certify that Tulare County Housing Authority is in compliance with the annual income reexamination requirements and that rents and utility allowance calculations have been or will be adjusted in accordance with current HUD requirements and regulations.
- In accordance with § 225 of Title II of Division K of the Consolidated Appropriations Act, 2008, Pub. L. 110-161 (approved December 26, 2007), I hereby certify that Tulare County Housing Authority has 400 or fewer units and has elected to transition to asset management.
- I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Signature of Authorized PHA Representative & Date:	Signature of Authorized HUD Representative & Date:
X	X

# Certification of Payments to Influence Federal Transactions

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

Applicant Name

Tulare County Housing Authority

Program/Activity Receiving Federal Grant Funding

Operating Subsidy CA 030000817

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

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(18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

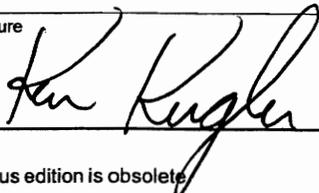
Name of Authorized Official

Ken Kugler

Title

Executive Director

Signature



Date (mm/dd/yyyy)

3-9-09

Previous edition is obsolete.

form HUD 50071 (3/98)  
ref. Handbooks 7417.1, 7475.13, 7485.1, & 7485.3

## SECTION 9

## ADMINISTRATIVE

Attached are the administrative documents required for submittal of the HATC MTW Plan. Those documents include the Board Resolution approving submission of the Plan as developed, verification that the necessary public hearings were held, Certification of a Drug-Free Workplace, Certification of Payments to Influence Federal Transactions, and Disclosure of Lobbying Activities.

As part of the administrative procedures for the MTW Plan, the HATC does not plan to do any specific evaluations or any other type of assessment with regard to the MTW program.

**BEFORE THE BOARD OF COMMISSIONERS  
OF THE  
HOUSING AUTHORITY OF THE COUNTY OF TULARE  
STATE OF CALIFORNIA**

-oOo-

**APPROVING THE ANNUAL )  
MOVING-TO-WORK )  
AGENCY PLAN )  
CERTIFICATIONS OF )  
COMPLIANCE )**

**RESOLUTION NO. 2009-04**

-oOo-

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman, I approve the submission of the Annual Moving-to-Work Agency Plan for the PHA fiscal year beginning 7/1/2009, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

1. The PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the PHA conducted a public hearing to discuss the Plan and invited public comment.
2. The Agency took into consideration public and resident comment before approval of the Plan by the Board of Commissioners in order to incorporate any public comments into the Annual MTW Plan;
3. The PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
4. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identify any impediments to fair-housing choice within those programs, address those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and maintain records reflecting these analyses and actions.
5. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
6. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
7. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part.
8. The PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
9. The PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.
10. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
11. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105( a).
12. The PHA will provide HUD or the responsible entity any documentation that the Department needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58.

13. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.

14. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.

15. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.

16. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments.).

17. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving-to-Work Agreement and Statement of Authorizations and included in its Plan.

18. All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its Plan and will continue to be made available at least at the primary business office of the PHA.

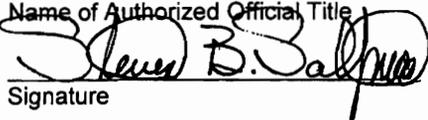
Housing Authority of the County of Tulare  
PHA Name

CA030  
PHA Number/HA Code

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Steven B. Saltzman  
Name of Authorized Official Title

Chairperson  
Title

  
Signature

3/20/09  
Date

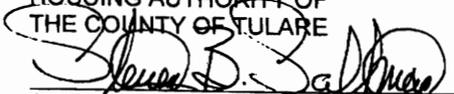
The foregoing resolution was adopted upon a motion presented by Commissioner Romero, and seconded by Commissioner Rojas, at a regular meeting of the Board of Commissioners held on the 18<sup>th</sup> day of March 2009. Motion carried by the following vote:

AYES: Saltzman, Tietjens, Snyder, Ybarra, Romero, Rojas

NAYES: None

ABSTAIN: None

ABSENT: None

HOUSING AUTHORITY OF  
THE COUNTY OF TULARE  
  
STEVEN B. SALTZMAN, CHAIRPERSON

**VIA E-MAIL, FOLLOWED  
BY REGULAR MAIL**

January 23, 2009

Ms. Rebe Haefer, Legal Classifieds  
Visalia Times-Delta  
Post Office Box 31  
Visalia, CA 93279

Dear Rebe:

Please publish the enclosed "Notice of Publication" in the legal section of your classified ads one time on the following date:

Friday – January 30, 2009

The ad does **not** require a bold outline. It will be necessary that we receive a Certificate of Publication for this notice. When billing our agency for this advertising, please be sure to include a copy of the Certificate of Publication and the tear sheet. Please forward billing and Certificate of Publication and the tear sheet to the Tulare County Housing Authority, Post Office Box 791, Visalia, CA 93279.

If you have any questions, please call me at 627-3700, extension 122.

Yours truly,

**HOUSING AUTHORITY OF THE COUNTY OF TULARE**

KERSTIN CLEGG  
Executive Assistant

Enclosure

MW/HUD/TimesDelta-CapitalGrant.doc

**Kerstin Clegg**

---

**From:** Kerstin Clegg  
**Sent:** Thursday, January 22, 2009 4:32 PM  
**To:** 'Visalia Times-Delta (rhaefer@visalia.gannett.com)'  
**Subject:** Advertisement

**VIA E-MAIL, FOLLOWED  
BY REGULAR MAIL**

January 23, 2009

Ms. Rebe Haefer, Legal Classifieds  
Visalia Times-Delta  
Post Office Box 31  
Visalia, CA 93279

Dear Rebe:

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Friday – January 30, 2009

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If you have any questions, please call me at 627-3700, extension 122.

Yours truly,

**HOUSING AUTHORITY OF THE COUNTY OF TULARE**

KERSTIN CLEGG  
Executive Assistant

Enclosure

**NOTICE OF PUBLIC COMMENT PERIOD  
NOTICE OF PUBLIC HEARING  
HOUSING AUTHORITY OF THE COUNTY OF TULARE**

January 26, 2009

Housing Authority of the County of Tulare  
5140 West Cypress Avenue

Visalia, CA 93277  
(559) 627-3700

The Housing Authority of the County of Tulare will be holding a public hearing regarding the Moving-to-Work (MTW) Demonstration Program and the Capital Funding Program on Thursday, February 12, 2009 at 3:00 P.M. at the above address. The Housing Authority will discuss components of its MTW Plan, the Capital Funding Program spending priorities, and an amendment to the current MTW contract with the U.S. Department of Housing and Urban Development.

The discussion items will include basing Section 8 Vouchers with specific housing projects, signing an amendment to the MTW contract with HUD regarding asset management, and use of reserve account funds for capital investments with Kaweah Management Company to develop additional low-income housing. The documents for discussion are on file at the Housing Authority of the County of Tulare office 5140 West Cypress Avenue, Visalia, CA and may be examined or copied weekdays 8:00 A.M. to 5:00 P.M.

Any individual, group or agency may submit written comments on the proposed amendment, changes, or Capital Funding priorities. All comments received by the Housing Authority by March 2, 2009 by 5:00 P.M. will be considered by the Housing Authority Board of Commissioners prior to authorizing submittal of the MTW Plan and Capital funding priorities to HUD. Comments may be made at the hearing, or you may submit them in writing to:

Housing Authority of the County of Tulare  
Post Office Box 791  
Visalia, CA 93279

**HOUSING AUTHORITY OF  
THE COUNTY OF TULARE**

By: KEN KUGLER, Executive Director

**EL AVISO DE PERÍODO DEL COMENTARIO PÚBLICO  
EL AVISO DE OÍDO PÚBLICO  
LA AUTORIDAD DE VIVIENDAS DEL CONDADO DE TULARE**

El 8 de enero de 2008

La Autoridad de Viviendas del Condado de Tulare  
5140 W Cypress Ave  
Visalia, CA 93277  
(559) 627-3700

La Autoridad de Viviendas del Condado de Tulare estará sosteniendo un oído público con respecto a el Programa de la Demostración, Moverse a Trabajar (MTW) Miercoles, 13 de febrero de 2008 a 2:00 P.M., a la dirección anterior. La Autoridad de Viviendas discutirá componentes de él Plan de MTW, y la extensión del contrato actual con el Departamento Americano de Alojamiento y Desarrollo Urbano para diez (10) años adicionales.

Los artículos de la discusión incluirán las definiciones del ingreso, deducciones, los cálculos de la renta, y usar los fondos de MTW para cualquier actividad elegible autorizada por HUD. Los documentos para la discusión están en archivos en la oficina de la Autoridad de Viviendas del Condado de Tulare 5140 West Cypress Avenue, Visalia, CA y puede examinarse o puede copiarse días de la semana 8:00 DE LA MAÑANA a 5:00 POSTMERIDIANO.

Cualquier individuo, grupo o agencia pueden someterse los comentarios en escrito en el nuevo contrato propuesto y cambios al Programa de MTW a la Autoridad de Viviendas. Todos los comentarios recibidos por la Autoridad de Viviendas antes de la fecha del oído público serán considerados por los Comisionados de la Autoridad de Viviendas antes de autorizar la firma del nuevo contrato. Pueden hacerse los comentarios al oído, o usted puede someterlos por escrito a:

La Autoridad de Viviendas del Condado de Tulare  
Post Office Box 791  
Visalia, CA 93279

**LA AUTORIDAD DE VIVIENDAS  
DEL CONDADO DE TULARE**

Por: KEN KUGLER, el Director ejecutivo

*Kerstin Clegg*  
Executive Assistant  
Housing Authority of the County of Tulare  
Phone (559) 627-3700 x 122  
[kerstin@hatc.net](mailto:kerstin@hatc.net)

**AVISO DE UN PERÍODO DE COMENTARIO PÚBLICO  
AVISO DE AUDIENCIA PÚBLICA  
LA AUTORIDAD DE VIVIENDAS DEL CONDADO DE TULARE**

Enero 26, del 2009

La Autoridad de Viviendas del Condado de Tulare  
5140 W Cypress Ave  
Visalia, CA 93277  
(559) 627-3700

La Autoridad de Viviendas del Condado de Tulare estará sosteniendo una audiencia pública con respecto a el Programa de Demostración, Moverse a Trabajar (MTW) el Jueves, 12 de Febrero del 2009 a las 3:00 P.M., en la dirección anteriormente mencionada. La Autoridad de Viviendas discutirá componentes de él Plan de MTW, las prioridades de gastos el Programa de Fondos Capitales y las enmendaduras al contrato actual de MTW con el Departamento de Alojamiento y Desarrollo Urbano (HUD).

Los temas que se discutirán incluyen el basar de los Vales de la Sección 8 con proyectos de alojamiento específicos, la firma de una enmendadura al contrato MTW con HUD con respecto al manejo de recursos, y el uso de fondos de las cuentas de reserva para inversiones capitales con Kaweah Management Company para desarrollar alojamiento de bajo-ingreso. Los documentos que estarán en discusión están archivados en la oficina de la Autoridad de Viviendas del Condado de Tulare localizada en el 5140 W. Cypress Avenue, Visalia, CA y pueden ser examinados o pueden copiarse de 8:00 A.M. a las 5:00 P.M.

Cualquier individuo, grupo o agencia puede someter comentarios por escrito acerca de la enmendadura propuesta, los cambios, o Las prioridades de Fondos Capitales. Todos los comentarios recibidos por la Autoridad de Viviendas antes de Marzo 2, 2009 a las 5:00 P.M. serán considerados por la mesa de Comisionados de la Autoridad de Viviendas antes de autorizar el someter el plan de MTW y las prioridades de Fondos Capitales a HUD. Los Comentarios se pueden hacer durante la Audiencia, o los puede someter por escrito a:

La Autoridad de Viviendas del Condado de Tulare  
Post Office Box 791  
Visalia, CA 93279

**LA AUTORIDAD DE VIVIENDAS  
DEL CONDADO DE TULARE**

Por: KEN KUGLER, Director Ejecutivo

**Kerstin Clegg**

**From:** Kerstin Clegg  
**To:** 'Haefer, Rebekah'  
**Subject:** Correction  
**Attachments:**

**Sent:** Fri 1/30/2009 10:30 AM

Hello Rebe,

I noticed today that our agency sent you the wrong Spanish translation (wrong dates in it) for the ad that was placed in today's paper. So now we have to place a correction for the Spanish version only. Would you please do so and let me know how soon it can be placed? Here is the correct version:

**AVISO DE UN PERÍODO DE COMENTARIO PÚBLICO**

**AVISO DE AUDIENCIA PÚBLICA**

**LA AUTORIDAD DE VIVIENDAS DEL CONDADO DE TULARE**

Enero 26, del 2009

La Autoridad de Viviendas del Condado de Tulare

5140 W Cypress Ave

Visalia, CA 93277

(559) 627-3700

La Autoridad de Viviendas del Condado de Tulare estará sosteniendo una audiencia pública con respecto a el Programa de Demostración, Moverse a Trabajar (MTW) el Jueves, 12 de Febrero del 2009 a las 3:00 P.M., en la dirección anteriormente mencionada. La Autoridad de Viviendas discutirá componentes de él plan de MTW, las prioridades de gastos el Programa de Fondos Capitales y las enmendaduras al contrato actual de MTW con el Departamento de Alojamiento y Desarrollo Urbano (HUD).

Los temas que se discutirán incluyen el basar de los Vales de la Sección 8 con proyectos de alojamiento específicos, la firma de una enmendadura al contrato MTW con HUD con respecto al manejo de recursos, y el uso de fondos de las cuentas de reserva para inversiones capitales con Kaweah Management Company para desarrollar alojamiento de bajo-ingreso. Los documentos que estarán en discusión están archivados en la oficina de la Autoridad de Viviendas del Condado de Tulare localizada en el 5140 W. Cypress Avenue, Visalia, CA y pueden ser examinados o pueden copiarse de 8:00 A.M. a las 5:00 P.M.

Cualquier individuo, grupo o agencia puede someter comentarios por escrito acerca de la enmendadura propuesta, los cambios, o Las prioridades de Fondos Capitales. Todos los comentarios recibidos por la Autoridad de Viviendas antes de Marzo 2, 2009 a las 5:00 P.M. serán considerados por la mesa de Comisionados de la Autoridad de Viviendas antes de autorizar el someter el plan de MTW y las prioridades de Fondos Capitales a HUD. Los Comentarios se pueden hacer durante la Audiencia, o los puede someter por escrito a:

La Autoridad de Viviendas del Condado de Tulare

Post Office Box 791

Visalia, CA 93279

**LA AUTORIDAD DE VIVIENDAS**

**DEL CONDADO DE TULARE**

Por: KEN KUGLER, Director Ejecutivo

*Kerstin Clegg*

Executive Assistant

Housing Authority of the County of Tulare

Phone (559) 627-3700 x 122

kerstin@hatc.net

Order Confirmation

**Order Confirmation For Ad #0000081073**

Visalia Times-Delta/Tulare Advance-Register  
 PO Box 31 - 330 N West St  
 Visalia CA 93291  
 (559) 735-3333

**Visalia Times-Delta**  
**Advance-Register**  
Visalia Times-Delta/Tulare Advance-Register

**Customer #** 10708VT  
 HOUSING AUTHORITY OF TULARE CO  
 PO BOX 791  
 VISALIA CA 93279-0791 USA  
**Customer Phone:** 559-627-3700  
**Customer EMail:** hatcdawn@aol.com

**Payor Customer #** 10708VT  
 HOUSING AUTHORITY OF TULARE CO  
 PO BOX 791  
 VISALIA CA 93279-0791 USA  
**Payor Phone:** 559-627-3700

**PO Number:** Kerstin Klegg  
**Ordered By:**  
**Customer Fax:** None  
**Special Pricing:** rhaefer  
**Sales Rep:** rhaefer  
**Order Taker:** rhaefer  
**Order Source:** Mail

Tear Sheets	Proofs	Affidavits @ \$10.00	Blind Box	Promo Type
0	0	1		VT Legal VTD Friday
<b>Materials</b>				
<b>Ad Order Notes</b>				
<b>Invoice Text</b>				
Net Amount	\$245.85			
Tax Amount	\$0.00			
Total Amount	\$245.85			
Payment Amount	\$0.00 -			
Amount Due	\$245.85			

Ad Number	Ad Type	Ad Size	Color	Production Method	Production Notes
0000081073-01	CLS Liner	: 1.0 X 250 Li	<NONE>	AdBooker	
<b>External Ad Number</b>		<b>Ad Attributes</b>	<b>Ad Released</b>	<b>Pick Up</b>	
			No	0000044484	



**Ad Content**  
 NOTICE OF PUBLIC  
 COMMENT PERIOD  
 NOTICE OF PUBLIC  
 HEARING  
 HOUSING AUTHORITY OF  
 THE COUNTY OF TULARE

January 28, 2009  
 Housing Authority of the  
 County of Tulare  
 5140 West Cypress Avenue  
 Visalia, CA 93277  
 (559) 627-3700

The Housing Authority of the County of Tulare will be holding a public hearing regarding the Moving to Work (MTW) Demonstration Program and the Capital Funding Program on Thursday, February 12, 2009 at 3:00 P.M. at the above address. The Housing Authority will discuss components of its MTW Plan, the Capital Funding Program spending priorities, and an amendment to the current MTW contract with the U.S. Department of Housing and Urban Development.

The discussion items will include basing Section 8 Vouchers with specific housing projects, signing an amendment to the MTW contract with HUD regarding asset management, and use of reserve account funds for capital investments with Kaweah Management Company to develop additional low-income housing. The documents for discussion are on file at the Housing Authority of the County of Tulare office 5140 West Cypress Avenue, Visalia, CA and may be examined or copied weekdays 8:00 A.M. to 5:00 P.M.

Any individual, group or agency may submit written comments on the proposed amendment, changes, or Capital Funding priorities. All comments received by the Housing Authority by March 2, 2009 by 5:00 P.M. will be considered by the Housing Authority Board of Commissioners prior to authorizing submittal of the MTW Plan and Capital Funding priorities to HUD. Comments may be made at

Order Confirmation

the hearing, or you may submit them in writing to:

Housing Authority of the County of Tulare  
Post Office Box 781  
Visalia, CA 93279

HOUSING AUTHORITY OF THE COUNTY OF TULARE

By: KEN KUGLER,  
Executive Director

EL AVISO DE PERIODO DEL COMENTARIO PUBLICO

EL AVISO DE OIDO PUBLICO

LA AUTORIDAD DE VIVIENDAS DEL CONDADO DE TULARE

El 8 de enero de 2008

La Autoridad de Viviendas del Condado de Tulare  
3140 W Cypress Ave  
Visalia, CA 93277  
(589) 827-3700

La Autoridad de Viviendas del Condado de Tulare estará sosteniendo un oido publico con respecto a el Programa de la Demostración, Moverse a Trabajar (MTW) Miércoles, 13 de febrero de 2008 a 2:00 P.M. a la dirección anterior. La Autoridad de Viviendas discutirá compromisos de el Plan de MTW, y la actualización del contrato actual con el Departamento Americano de Alojamiento y Desarrollo Urbano para diez (10) años adicionales.

Los artículos de la discusión incluirán las definiciones del ingreso, deducciones, los cálculos de la renta, y usar los fondos de MTW para cualquier actividad elegible autorizada por HUD. Los documentos para la discusión están en archivos en la oficina de la Autoridad de Viviendas del Condado de Tulare 3140 West Cypress Avenue, Visalia, CA y puede examinarlos o pueda copiarlos días de la semana 8:00 DE LA MAÑANA a 5:00 POSTMERIDIANO.

Cualquier individuo, grupo o agencia pueden someterse los comentarios en escrito en el nuevo contrato propuesto y cambios al

Order Confirmation

La Autoridad de Viviendas.  
 Todos los comentarios  
 recibidos por la Autoridad  
 de Viviendas antes de la  
 fecha del año público  
 serán considerados por los  
 Comisionados de la  
 Autoridad de Viviendas an-  
 tes de autorizar la firma del  
 nuevo contrato. Pueden  
 hacerse los comentarios al  
 CDO, o usted puede  
 someterlos por escrito a:

La Autoridad de Viviendas  
 del Condado de Tulare  
 Post Office Box 791  
 Visalia, CA 93278

LA AUTORIDAD DE  
 VIVIENDAS

DEL CONDADO DE TULARE

Por: KEN WIGLER,  
 el Director ejecutivo

Public: Jan. 30, 2009  
 Agr#1073

<u>Product Information</u>	<u>Placement/Classification</u>	<u>Start Date</u>	<u># Inserts</u>
Visalia Times-Delta::	Legals	1/30/2009	1
Tulare Adv-Register::	Legals	1/30/2009	1
Online-VTD/TAR::	Legals	1/30/2009	1
El Sol-Visalia::	Legals	1/30/2009	1

Public Hearing Feb. 12<sup>th</sup>

Name

Address

TOM SOORSAWATIP

KONGKHAM-KHAMNOUNE

2700-N-WILLIS ST

PETER SALERNO

5053 W. CRENSHAW DR. VISALIA CA

Webster West

102 E MYRTLE AVE VISALIA, CA 93277

Teresa Chavez

5037 La Vida Ave, Visalia, CA 93277

alvaro Cervantes

1714 Heritage Visalia

Sally AND JOE SYLVIA

4243 W. MYRTLE AVE VIS 93277

Alma Calderon

Carolyn Lanzy

1146 ML King Blvd Tulare

Trinidad Renteria

20800-A ave 352 Wapella

Lavette Riley

248 E west Tulare CA. 93286

Russell Clark

120. West Calhoun

Ph 6274734

DELORES FOZHA

1443 1/2 N. Willis VSA.

**MINUTES OF THE RESIDENT COUNCIL  
HOUSING AUTHORITY OF THE COUNTY OF TULARE  
THURSDAY, FEBRUARY 19, 2009**

Members Present:

Patsy Holland  
Georgie Baugh  
Mayra Rojas

Staff Present:

Dawn Sandoval, Human Resources Manager  
Margaret Lowe, Deputy Executive Director

The minutes of the previous meeting were approved, as written.

Ms. Sandoval reviewed the scholarship program with the council, where scholarships are offered to graduating seniors. Letters were sent out January 26<sup>th</sup>, and are due back by March 6<sup>th</sup>. We have had eight applications requested so far, but it is too early to tell how many will be returned. Interviews will be held in April. Patsy Holland expressed sadness that she will not be able to participate in the process any longer, but Ms. Sandoval stated that Steve Saltzman from the Housing Authority board will be on the committee along with Manuel Cosio, an area manager who has been active in presenting the awards in the past. Mayra Rojas also expressed interest in being on the committee.

Margaret Lowe reviewed the Capital Fund plan for the agency for the coming fiscal year (2009-2010). This money is a "Fair Share" non-competitive allocation from HUD for modernization and rehabilitation of our 710 public-housing units. This is for work which will begin on July 1, 2009. This coming year the agency is expecting around \$1,600,000 and is planning to use some of the money for various administrative costs including upgrades to the computer system. The vast majority of the money will be spent on roofing, painting, landscaping, appliances, flooring windows, carpets, etc. It is planned to spend \$200,000 in the Visalia area, \$850,000 in Tulare including \$400,000 on roofing, \$100,000 in Porterville, and \$250,000 in the Dinuba area.

Ms. Lowe then brought up the Moving-to-Work (MTW) Agency Plan and the changes which were being proposed. She explained that one of the proposed changes would be to transition any able-bodied families who had been on either the Section 8 or Public Housing over to the MTW demonstration program starting with their first annual re-exam following approval by HUD of the proposed plan. She stated that since that time any family starting the program that was not elderly or disabled had automatically been put on the fixed rent or subsidy program with the time limit to encourage them to become self-sufficient. The

agency believes that families who started assistance before that time should be treated the same way and encouraged to go to work, too.

The next change discussed was the proposal to "Project Base" 30 housing vouchers in the City of Tulare. The city would like the agency's help in developing a new low-income housing project and needs the project-based funding to make it work. Since the agency has seen a drop in Section 8 contracts in the City of Tulare over the last five years, this would also be a way to increase housing choices for the Section 8 program.

The final change discussed as a proposed amendment to the MTW program which was sent by HUD which would allow changes to the way funding is used by the agency and open up opportunities which are not presently allowed.

There were no questions or suggested changes to the MTW Plan.

Under old business, Ms. Baugh asked if the agency is still planning to put a concrete wall around the dumpster at her complex, and was told that it is on the budget and should be worked on sometime in the next few months.

There was no business discussed.

The meeting was adjourned at 4:12 P.M.

Respectfully submitted,

HOUSING AUTHORITY OF THE COUNTY OF TULARE



By \_\_\_\_\_  
MARGARET LOWE  
Deputy Executive Director

MINUTES OF THE MOVING TO WORK  
PUBLIC HEARING

FEBRUARY 12, 2009

The Executive Director of the Housing Authority of the County of Tulare, Ken Kugler, opened the meeting at 3:05 P. M. with an introduction about the Moving To Work Program, and he explained the purpose of the MTW annual Plan and how the process works. He asked the attendees to identify whether they were on the Section 8 Voucher Program or the Public Housing Program, and it was fairly evenly divided. Mr. Kugler explained that HUD provides money through Capital Funding to modernize and upgrade Public Housing Units.

Mr. Kugler then went on to present the Capital Funding Plan for the 2009-2010 fiscal years. It is anticipated that the Agency will receive somewhere around \$1,600,000. The plan is to use this money for new roofing, landscaping, flooring, painting, appliances, etc. The plan shows \$200,000 will be spent in the Visalia area, \$850,000 in Tulare with \$400,000 going to a roofing project, \$100,000 to be spent in Porterville, and \$250,000 in the Dinuba area. Mr. Kugler then turned over the meeting to Margaret Lowe to explain the anticipated program changes.

Ms. Lowe explained that one of the proposed changes would be to transition any able-bodied families who had been on either the Section 8 or Public Housing over to the MTW demonstration program starting with their first annual re-exam following approval by HUD of the proposed plan. She stated that since that time any family starting the program that was not elderly or disabled had automatically been put on the fixed rent or subsidy program with the time limit to encourage them to become self-sufficient. The Agency believes that families who started assistance before that time should be treated the same way and encouraged to go to work, too.

The next change discussed was the proposal to "Project Base" 30 Housing Vouchers in the City of Tulare. The City would like the Agency's help in developing a new low income housing project and needs the project-based funding to make it work. Since the Agency has seen a drop in Section 8 contracts in the City of Tulare over the last 5 years, this would also be a way to increase housing choices for the Section 8 program.

The final change discussed as a proposed amendment to the MTW program which was sent by HUD which would allow changes to the way funding is used by the Agency and open up opportunities which are not presently allowed. The meeting was then opened up to questions.

The first question was "What is HUD, and how does it interface with the Housing Authority?" Ms. Lowe explained that the Department of Housing and Urban Development is part of the Federal Government which oversees a large number of different types of housing programs, including Public Housing and Section 8. She explained that the Housing Authority contracts with HUD to administer those programs in the jurisdiction.

The next question was whether the rules for families paying an income-based rent would change this year or in the future. Ms. Lowe explained that the only changes proposed for the coming year would be for those families who started assistance before May of 1999. She went on to explain that there could be changes in the future, but that those had not been worked out yet, but could include possible changes to the way utility allowances were handled. She stated that any such changes would be presented in future years this same way through the Agency Plan and the Public Hearing process.

A question was raised as to whether current families could participate in the Project based units in Tulare when they are built. Ms. Lowe stated if families were eligible for 3 bedroom units, they would be eligible to participate if they so chose.

Finally, it was asked how it was determined who would be on the MTW program vs. the income-based program. Ms. Lowe explained that families who are elderly or disabled are given a choice, but that able-bodied families are automatically put on to the MTW program.

All further questions were personal in nature and there were no suggestions for additions or changes to the Plan, so the meeting was adjourned at 3:43 P. M. and attendees were helped individually with their personal cases.



Margaret Lowe  
Margaret Lowe, Deputy Executive Director

# Certification for a Drug-Free Workplace

U.S. Department of Housing and Urban Development

Applicant Name

Housing Authority of the County of Tulare

Program/Activity Receiving Federal Grant Funding

Public and Section 8 Assistance Housing

Acting on behalf of the above named Applicant as its Authorized Official, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the sites listed below:

I certify that the above named Applicant will or will continue to provide a drug-free workplace by:

a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the Applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition.

b. Establishing an on-going drug-free awareness program to inform employees ---

(1) The dangers of drug abuse in the workplace;

(2) The Applicant's policy of maintaining a drug-free workplace;

(3) Any available drug counseling, rehabilitation, and employee assistance programs; and

(4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

c. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph a.;

d. Notifying the employee in the statement required by paragraph a. that, as a condition of employment under the grant, the employee will ---

(1) Abide by the terms of the statement; and

(2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

e. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph d.(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;

f. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph d.(2), with respect to any employee who is so convicted ---

(1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or

(2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs a. thru f.

2. **Sites for Work Performance.** The Applicant shall list (on separate pages) the site(s) for the performance of work done in connection with the HUD funding of the program/activity shown above: Place of Performance shall include the street address, city, county, State, and zip code. Identify each sheet with the Applicant name and address and the program/activity receiving grant funding.)

Check here  If there are workplaces on file that are not identified on the attached sheets.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official Ken Kugler	Title Executive Director
Signature <i>Ken Kugler</i>	Date 02/02/2009

form HUD-50070 (3/98)  
ref. Handbooks 7417.1, 7475.13, 7485.1 & .3

**Certification of Payments  
to Influence Federal Transactions**

**U.S. Department of Housing  
and Urban Development**  
Office of Public and Indian Housing

Applicant Name

Housing Authority of the County of Tulare

Program/Activity Receiving Federal Grant Funding

Public and Section 8 Housing Assistance

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

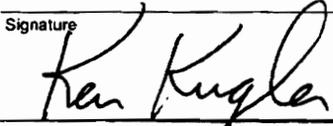
(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties.  
(18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official <b>Ken Kugler</b>	Title <b>Executive Director</b>
Signature 	Date (mm/dd/yyyy) <b>02/02/2009</b>

Previous edition is obsolete

**form HUD 50071 (3/98)**  
ref. Handbooks 7417.1, 7475.13, 7485.1, & 7485.3

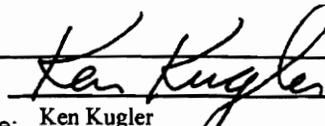
## DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

Approved by OMB

0348-0046

(See reverse for public burden disclosure.)

<b>1. Type of Federal Action:</b> <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	<b>2. Status of Federal Action:</b> <input type="checkbox"/> c. a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	<b>3. Report Type:</b> <input type="checkbox"/> na. a. initial filing <input type="checkbox"/> b. material change <b>For Material Change Only:</b> year _____ quarter _____ date of last report _____
<b>4. Name and Address of Reporting Entity:</b> <input type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, if known:  Housing Authority of the County of Tulare PO Box 791 Visalia CA 93279  Congressional District, if known: 4c	<b>5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:</b>   Congressional District, if known:	
<b>6. Federal Department/Agency:</b>	<b>7. Federal Program Name/Description:</b>  CFDA Number, if applicable: _____	
<b>8. Federal Action Number, if known:</b>	<b>9. Award Amount, if known:</b> \$ _____	
<b>10. a. Name and Address of Lobbying Registrant</b> (if individual, last name, first name, MI):	<b>b. Individuals Performing Services</b> (including address if different from No. 10a) (last name, first name, MI):	
<b>11.</b> Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Signature: <u></u> Print Name: <u>Ken Kugler</u> Title: <u>Executive Director</u> Telephone No.: <u>559-627-3700 ext 114</u> Date: <u>02/02/2009</u>	
<b>Federal Use Only:</b>		Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)

## APPENDIX A

## MTW HARDSHIP POLICY

The Housing Authority recognizes that substantial, unforeseen hardships may arise, such that families cannot pay their full rent. In such cases, the families may apply to the Housing Authority for relief. Relief may consist of deferral of a portion of the rent. The Housing Authority shall consider such a request, taking into consideration other local resources available to the family. Such requests must be in writing, stating the reason for the hardship, and the expected duration. Consideration will be given for hardship when a family has suffered a catastrophic change, which caused the death, illness or long-term disability of an adult family member, which resulted in the loss of income to the family. These families will be referred to CSET for an assessment of options and links to other community resources for recovery. A contract will be signed with the family stipulating the change to their Moving-to-Work assistance and the steps the family will take to work toward self-sufficiency. The contract will specify the amount by which the family's public housing program rent will be decreased, and for what duration. The amount by which the rent will be changed will be determined by Housing Authority staff on a case-by-case basis. If all possible wage earner(s) for a family become(s) permanently disabled, the family will be changed to a traditional income-based program with no time limit.

In cases where a CSET evaluation is not possible or productive, and where there are still possible wage earners, the hardship request will be presented to a Hardship Committee made up of community citizens who have sufficient knowledge of the MTW program to make informed decisions as to the disposition of rental assistance for such families. Decisions of the Hardship Committee will be final.

This policy is not intended to apply to seasonal-income fluctuations, nor minor or temporary reductions of income.

<b>Time-Out Hardship Requests Analysis</b>	
<b>As of 12/31/2008</b>	
Number of MtW Time-Outs	1092
Number of Hardships Requests	50
Percentage of Hardship Requests	5%
Hardship Requests Approved	34

## APPENDIX B

## VIOLENCE AGAINST WOMEN AND DEPARTMENT OF JUSTICE REAUTHORIZATION ACT OF 2005 COMPLIANCE

The Housing Authority of Tulare County has implemented the policies of the Violence Against Women and Department of Justice Reauthorization Act of 2005 (VAWA). Under those policies, Section 8 Program tenants and landlords are informed of the requirements of the law, both in letters and in the revised Section contracts and Tenancy Addendums. Any questions by landlords are referred to our attorney.

Our Public Housing staff is trained to watch for the effects of domestic violence, and to intervene where appropriate. When eviction notices are served for causes other than non-payment of rent, letters and certification forms informing tenants of their VAWA rights are given to the family members involved so that they can inform the Agency of any domestic violence, and the eviction can be bifurcated.

The Agency cooperates with the various shelters in the jurisdiction. When informed of domestic violence situations either by shelter staff or the tenants themselves, the families are informed where they can stay temporarily and get any legal help they may need. Agency policies include provisions to assist remaining family members while taking measures to evict or restrict the abuser from access to the unit or the complex.

## APPENDIX C

## **PROJECT-BASED VOUCHER PLAN**

### **INTRODUCTION**

This document contains HUD regulations and the Housing Authority of the County of Tulare (Hereinafter referred to as HATC) policies related to the project-based voucher (PBV) program.

#### Section I: General Requirements

General provisions of the PBV program including maximum budget authority requirements, and equal opportunity requirements.

#### Section II: PBV Owner Proposals

Policies related to the submission and selection of owner proposals for PBV assistance. It describes the factors the HATC will consider when selecting proposals, the type of housing that is eligible to receive PBV assistance, the cap on assistance at projects receiving PBV assistance, subsidy layering requirements, site selection standards, and environmental review requirements.

#### Section III: Rehabilitated and Newly Constructed Units

Describes requirements and policies related to the development and completion of newly constructed housing units that will be receiving PBV assistance.

#### Section IV: Dwelling Units

Describes requirements related to housing quality standards, the type and frequency of inspections, and housing accessibility for persons with disabilities.

#### Section V: Selection of PBV Program Participants/Wait List Process

Describes the requirements and policies governing how the HATC and the owner will select a family to receive PBV assistance.

#### Section VI: Housing Assistance Payments Contract

Describes HAP contract requirements and policies including the execution, term, and termination of the HAP contract. In addition, it describes how the HAP contract may be amended and identifies provisions that may be added to the HAP contract at the HATC's discretion.

#### Section VII: Occupancy

Describes occupancy requirements related to the lease, and describes under what conditions families are allowed or required to move. In addition, exceptions to the occupancy cap (which limits PBV assistance to 25 percent of the units in any project) are also discussed.

#### Section VIII: Determining Rent to Owner

This part describes how the initial rent to owner is determined, and how rent will be redetermined throughout the life of the HAP contract and rent reasonableness requirements.

Section IX: Payments to Owner

Describes the types of payments owners may receive under this program.

## **SECTION I: GENERAL REQUIREMENTS**

### **I.A. OVERVIEW [24 CFR 983.5]**

HATC Policy

*The HATC will operate a project-based voucher program using up to 30 units of its Housing Choice Voucher funds for project-based assistance. The specific number of vouchers to be made available annually will be established in the HATC MTW Plan. The HATC MTW Plan allows for numerous and/or specific regulatory relief from the standard 24 CFR regulations. Throughout this project-based voucher selection process, and in addition to the 24 CFR sections denoted in this document, the HATC will utilize the HATC MTW Plan provisions to determine eligibility, rents, and selection criteria.*

### **I.B. TENANT-BASED VS. PROJECT-BASED VOUCHER ASSISTANCE [24 CFR 983.2]**

Except as otherwise noted in this chapter, or unless specifically prohibited by PBV program regulations, the HATC policies for the tenant-based voucher program contained in this administrative plan also apply to the PBV program and its participants.

### **I.C. RELOCATION REQUIREMENTS [24 CFR 983.7]**

The HATC only plans to use PB Vouchers for new construction, relocation requirements will not apply.

### **I.D. EQUAL OPPORTUNITY REQUIREMENTS [24 CFR 983.8]**

The HATC must comply with all equal opportunity requirements under federal law and regulations in its implementation of the PBV program. This includes the requirements and authorities cited at 24 CFR 5.105(a). In addition, the HATC must comply with the HATC Plan certification on civil rights and affirmatively furthering fair housing, submitted in accordance with 24 CFR 903.7(o).

## SECTION II: PBV OWNER PROPOSALS

### II.A. OVERVIEW

The following describes the procedures for owner submission of PBV proposals and for HATC selection of PBV proposals [24 CFR 983.51]. Before selecting a PBV proposal, the HATC must determine that the PBV proposal complies with HUD program regulations and requirements, including a determination that the property is eligible housing [24 CFR 983.53 and 983.54], complies with the cap on the number of PBV units per building [24 CFR 983.56], and meets the site selection standards [24 CFR 983.57].

### II.B. OWNER PROPOSAL SELECTION PROCEDURES [24 CFR 983.51]

#### HATC Policy

*The HATC will solicit proposals by using a “Request for Proposals” to select projects on a competitive basis in response to the HATC request.*

#### ***Solicitation and Selection of PBV Proposals [24 CFR 983.51(b) and (c)]***

##### HATC Policy

*The HATC will advertise its request for proposals (RFP) for existing housing in the following newspapers and other trade journals:*

*Visalia Times Delta, Tulare Advanced Register*

*In addition, the HATC will post the notice inviting such proposal submission and the rating and ranking procedures on its electronic web site.*

*The HATC will publish its advertisement in the newspapers and trade journals mentioned above for at least one day per week for three consecutive weeks. The advertisement will specify the number of units the HATC estimates that it will be able to assist under the funding the HATC is making available.*

*The HATC will rate and rank proposals for newly constructed housing using the following criteria:*

*Owner experience and capability to build or rehabilitate housing as identified in the RFP (rehab or new construction);*

*Owner experience and ability to Market and manage the Project;*

*Project Feasibility and Readiness to begin Construction;*

*Experience in management and operation of affordable housing projects;*

*Experience as an owner in the tenant-based voucher program and owner compliance with the owner’s obligations under the tenant-based program;*

*Extent to which the project furthers the HATC goal of deconcentrating poverty and expanding housing and economic opportunities;*

*The location in a site designated for renovation through the City of Tulare Redevelopment District;*

*Location of units with respect to shopping, health care, schools, neighborhood recreational facilities and public transportation;*

*The site is suitable from the standpoint of facilitating and furthering Fair Housing Laws;*  
*The site meets HQS and is reasonably free from disturbing noises and reverberations and other dangers to the health, safety, and general welfare of the occupants;*  
*The site passes the Site and Neighborhood Review;*  
*The units are eligible for PBV assistance under 24 CFR 983.53 and 983.54;*  
*and*  
*The units are not owner occupied*

### ***HATC Notice of Owner Selection [24 CFR 983.51(d)]***

#### **HATC Policy**

*Notice of owner selection will be made after the rating/ranking process has been completed by the PBV Project Review Committee.*

*The HATC will notify the selected owner in writing of the owner's selection for the PBV program. The HATC will also notify in writing all owners that submitted proposals that were not selected and advise such owners of the name of the selected owner.*

*In addition, the HATC will publish its notice for selection of PBV proposals in the same newspapers the HATC used to solicit the proposals. The announcement will include the name of the owner that was selected for the PBV program. The HATC will also post the notice of owner selection on its electronic web site.*

*The HATC will make available to any interested party its rating and ranking sheets and documents that identify the HATC basis for selecting the proposal. These documents will be available for review by the public and other interested parties for one month after publication of the notice of owner selection. The HATC will not make available sensitive owner information that is privileged, such as financial statements and similar information about the owner.*

*The HATC will make these documents available for review at the HATC during normal business hours. The cost for reproduction of allowable documents will be \$.10 per page.*

### **II.C. HOUSING TYPE [24 CFR 983.52]**

The HATC will attach PBV assistance for newly constructed single family housing for a lease-to-own program.

The HATC choice of housing type shall be reflected in its solicitation for proposals.

### **II.D. PROHIBITION OF ASSISTANCE FOR CERTAIN UNITS**

#### **Ineligible Housing Types [24 CFR 983.53]**

The HATC will not accept RFP's or pay PBV assistance to shared housing units; units on the grounds of a penal reformatory, medical, mental, or similar public or private institution; nursing homes or facilities providing continuous psychiatric, medical, nursing services, board and care, or intermediate care, assisted living facilities; units that are owned or controlled by an educational institution or its affiliate and are designated for occupancy by students; manufactured homes; cooperative housing; and transitional housing.

The HATC will not accept RFP's or attach or pay PBV assistance for a unit occupied by an owner. The HATC will not select or enter into an agreement to enter into a HAP contract or HAP contract for a unit occupied by a family ineligible for participation in the PBV program.

**Subsidized Housing [24 CFR 983.54]**

A HATC will not attach or pay PBV assistance to units in any of the following types of subsidized housing:

- A public housing unit;
- A unit subsidized with any other form of Section 8 assistance;
- A unit subsidized with any governmental rent subsidy regardless of the level of subsidy;
- A unit subsidized with any governmental subsidy that covers all or any part of the operating costs of the housing;
- A unit subsidized with Section 236 rental assistance payments (except that a HATC may attach assistance to a unit subsidized with Section 236 interest reduction payments);
- A Section 202 project for non-elderly with disabilities;
- Section 811 project-based supportive housing for persons with disabilities;
- Section 202 supportive housing for the elderly;
- A Section 101 rent supplement project;
- A unit subsidized with any form of tenant-based rental assistance;
- A unit with any other duplicative federal, state, or local housing subsidy, as determined by HUD or the HATC in accordance with HUD requirements.

**II.E. SUBSIDY LAYERING REQUIREMENTS [24 CFR 983.55]**

The subsidy layering review is intended to prevent excessive public assistance by combining (layering) housing assistance payment subsidy under the PBV program with other governmental housing assistance from federal, state, or local agencies, including assistance such as tax concessions or tax credits.

The HATC shall submit the necessary documentation to HUD for a subsidy layering review. The HATC will not enter into an agreement to enter into a HAP contract or a

HAP contract until HUD has conducted any required subsidy layering review and determined that the PBV assistance is in accordance with HUD subsidy layering requirements.

The HAP contract must contain the owner's certification that the project has not received and will not receive (before or during the term of the HAP contract) any public assistance for acquisition, development, or operation of the housing other than assistance disclosed in the subsidy layering review in accordance with HUD requirements.

## **II.F. CAP ON NUMBER OF PBV UNITS IN EACH BUILDING**

### **25 Percent per Building Cap [24 CFR 983.56(a)]**

In general, the HATC will not select a proposal to provide PBV assistance for units in a building or enter into an agreement to enter into a HAP or a HAP contract to provide PBV assistance for units in a building, if the total number of dwelling units in the building that will receive PBV assistance during the term of the PBV HAP contract is more than 25 percent of the number of dwelling units (assisted or unassisted) in a project.

### **Exceptions to 25 Percent per Building Cap [24 CFR 983.56(b)]**

Exceptions are allowed and PBV units are not counted against the 25 percent per project cap if:

- The units are in a single-family building (one to four units);
- The units are *excepted units* in a multifamily building because they are specifically made available for elderly or disabled families or families receiving supportive services (also known as *qualifying families*).

### HATC Policy

*Because the HATC will be using PBV's for a rent-to-own program, the PVBs will be used only for single family units.*

## **II.G. SITE SELECTION STANDARDS/SITE AND NEIGHBORHOOD STANDARDS**

### **Compliance with PBV Goals, Deconcentration Policy, Civil Rights Requirements, and HQS Site Standards [24 CFR 983.57(b)]**

The HATC shall not select a proposal for existing, newly constructed, or rehabilitated PBV housing on a site or enter into an agreement to enter into a HAP contract or HAP contract for units on the site, unless the HATC has determined that PBV assistance for

housing at the selected site is consistent with the goal of deconcentrating poverty and expanding housing and economic opportunities as described in this section. In addition, prior to selecting a proposal, the HATC shall determine that the site is suitable from the standpoint of facilitating and furthering full compliance with the applicable Civil Rights Laws, regulations, and Executive Orders, and that the site meets the HQS site and neighborhood standards at 24 CFR 982.401(l).

HATC Policy

*It is the HATC goal to select sites for PBV housing that further the goals of the City of Tulare Redevelopment Agency, but also provide for deconcentrating poverty and expanding housing and economic opportunities. In complying with this goal the HATC will limit approval of sites for PBV housing in census tracts that have poverty concentrations of 20 percent or less.*

*However, the HATC may grant exceptions to the 20 percent standard where the HATC determines that the PBV assistance will complement other local redevelopment activities designed to deconcentrate poverty and expand housing and economic opportunities in census tracts with poverty concentrations greater than 20 percent, such as sites in:*

*A census tract in which the proposed PBV development will be located in a HUD-designated Enterprise Zone, Economic Community, or Renewal Community;*

*A census tract where the concentration of assisted units will be or has decreased as a result of public housing demolition and HOPE VI redevelopment;*

*A census tract in which the proposed PBV development will be located is undergoing significant revitalization as a result of state, local, or federal dollars invested in the area;*

*A census tract where new market rate units are being developed where such market rate units will positively impact the poverty rate in the area;*

*A census tract where there has been an overall decline in the poverty rate within the past five years; or*

*A census tract where there are meaningful opportunities for educational and economic advancement.*

*Under no circumstances will the HATC approve PBV assistance in a census tract with a concentration factor greater than 50 percent of the community-wide poverty rate.*

**Housing Site and Neighborhood Standards [24 CFR 983.57(d)]**

The HATC shall not enter into an agreement to enter into a HAP contract nor enter into a HAP contract for existing or rehabilitated housing until it has determined that the site complies with the HUD required site and neighborhood standards. The site must:

- Be adequate in size, exposure, and contour to accommodate the number and type of units proposed;
- Have adequate utilities and streets available to service the site;
- Promote a greater choice of housing opportunities and avoid undue concentration of assisted persons in areas containing a high proportion of low-income persons;
- Be accessible to social, recreational, educational, commercial, and health facilities and services and other municipal facilities and services equivalent to those found in neighborhoods consisting largely of unassisted similar units;
- Be located so that travel time and cost via public transportation or private automobile from the neighborhood to places of employment is not excessive;
- Promote a greater choice of housing opportunities and avoids undue concentration of assisted persons in areas containing a high proportion of low-income persons;
- Not be located in a neighborhood that is seriously detrimental to family life or in which substandard dwellings or other undesirable conditions predominate, unless there is actively in progress a concerted program to remedy the undesirable conditions;
- The site must not be located in an area of minority concentration unless the HATC determines that sufficient, comparable opportunities exist for housing for minority families in the income range to be served by the proposed project outside areas of minority concentration or that the project is necessary to meet overriding housing needs that cannot be met in that housing market area;
- Meet the HQS site standards at 24 CFR 982.401;and
- Be suitable from the standpoint of facilitating and furthering full compliance with the applicable provisions of the Fair Housing and Equal Opportunity laws as follows:
  - 1) Title VI of the Civil Rights Act of 1964 and HUD's implementing regulations at 24CFR Part 1;
  - 2) Title VIII of the Civil Rights Act of 1968 and HUD's implementing regulations at 24 CFR parts 100-199
  - 3) Executive Order 11063 and HUD's implementing regulations 24 CFR 107;
  - 4) The project site must meet the section 504 site selection requirements described in 24 CFR 8.4(b)(5).

## **II.H. ENVIRONMENTAL REVIEW [24 CFR 983.58]**

The HATC activities under the PBV program are subject to HUD environmental regulations in 24 CFR parts 50 and 58. The City of Tulare is the responsible entity, responsible for performing the federal environmental review under the National Environmental Policy Act of 1969 (42 U.S.C. 4321 et seq.). The HATC will not enter into an agreement to enter into a HAP contract nor enter into a HAP contract until it has complied with the environmental review requirements.

The HATC will not enter into an agreement to enter into a HAP contract or a HAP contract with an owner, construct real property or commit or expend program or local funds for PBV activities under this part, until the environmental review is completed.

The HATC shall supply all available, relevant information necessary for the responsible entity to perform any required environmental review for any site. The HATC shall require the owner to carry out mitigating measures required by the responsible entity (or HUD, if applicable) as a result of the environmental review.

### **SECTION III: NEWLY CONSTRUCTED UNITS**

Upon notice from the owner that the housing is completed, the HATC shall inspect to determine if the housing has been completed in accordance with HQS. The HATC shall also determine if the owner has submitted all required evidence of completion.

If the work has not been completed in accordance with HQS, the HATC will not enter into the HAP contract.

If the HATC determines the work has been completed in accordance with HQS and that the owner has submitted all required evidence of completion, the HATC shall submit the HAP contract for execution by the owner and execute the HAP contract.

### **SECTION IV: DWELLING UNITS/HQS INSPECTIONS PROTOCOL**

#### **IV.A. HOUSING ACCESSIBILITY FOR PERSONS WITH DISABILITIES**

The housing must comply with program accessibility requirements of section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794) and implementing regulations at 24 CFR part 8. The HATC shall ensure that the percentage of accessible dwelling units complies with the requirements of section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), as implemented by HUD's regulations at 24 CFR 8, subpart C.

Housing first occupied after March 13, 1991, must comply with design and construction requirements of the Fair Housing Amendments Act of 1988 and implementing regulations at 24 CFR 100.205, as applicable. (24 CFR 983.102)

## **IV.B. INSPECTING UNITS**

### **Pre-HAP Contract Inspections [24 CFR 983.103(b)]**

The HATC shall inspect each contract unit before execution of the HAP contract. The HATC will not enter into a HAP contract covering a unit until the unit fully complies with HQS.

### **Turnover Inspections [24 CFR 983.103(c)]**

Before providing assistance to a new family in a contract unit, the HATC shall inspect the unit. The HATC will not provide assistance on behalf of the family until the unit fully complies with HQS.

### **Annual Inspections [24 CFR 983.103(d)]**

At least annually during the term of the HAP contract, the HATC shall inspect all PBV units under HAP Contract in accordance with HQS requirements.

### **Special/Other Inspections [24 CFR 983.103(e)]**

The HATC shall inspect contract units whenever needed to determine that the contract units comply with HQS and that the owner is providing maintenance, utilities, and other services in accordance with the HAP contract. The HATC will take into account complaints and any other information coming to its attention in scheduling of special/other inspections.

The HATC will conduct follow-up inspections needed to determine if the owner (or, if applicable, the family) has corrected an HQS violation, and will conduct inspections to determine the basis for exercise of contractual and other remedies for owner or family violation of HQS.

### **Supervisory/Quality Control Inspections**

The HATC will include a representative sample of project-based units when conducting annual supervisory quality control inspections.

## **SECTION V: SELECTION OF PBV PROGRAM PARTICIPANTS**

### **V.A. OVERVIEW**

Many of the provisions of the tenant-based voucher regulations [24 CFR 982] also apply to the PBV program. Even with these similarities, there are requirements that are unique to the PBV program. This part describes the requirements and policies related to eligibility and admission to the PBV program.

### **V.B. ELIGIBILITY FOR PBV ASSISTANCE [24 CFR 983.251(a) and (b)]**

Applicants for PBV assistance must meet the same eligibility requirements as applicants for the tenant-based voucher program. Applicants must qualify as a family as defined by HUD and the HATC, have income at or below HUD-specified income limits, and qualify on the basis of citizenship or the eligible immigration status of family members [24 CFR 982.201(a) and 24 CFR 983.2(a)]. In addition, an applicant family must provide social security information for family members [24 CFR 5.216 and 5.218] and consent to the HATC's collection and use of family information regarding income, expenses, and family composition [24 CFR 5.230]. An applicant family must also meet HUD requirements related to current or past criminal activity.

HATC Policy

*The HATC will determine an applicant family's eligibility for the PBV program in accordance with the policies in Chapter 3. In addition, the family must qualify for a unit based on the HA's subsidy standard.*

**V.C. ORGANIZATION OF THE WAITING LIST [24 CFR 983.251(c)]**

HATC Policy

*The landlord for the PBV project will keep the waiting list for the complex, and submit applicant information to the HATC for final determination of eligibility. The HATC will inform all applicants of the opportunity to apply for the PBV complex.*

**V.D. PBV ASSISTANCE**

**Family Briefing**

When a family accepts an offer for PBV assistance, the HATC shall give the family an oral briefing. The briefing will include information on how the program works and the responsibilities of the family and owner. In addition to the oral briefing, the HATC will provide a briefing packet that explains how the HATC determines the total tenant payment for a family, the family obligations under the program, and applicable fair housing information.

**Persons with Disabilities**

If an applicant family's head or spouse is disabled, the HATC shall assure effective communication, in accordance with 24 CFR 8.6, in conducting the oral briefing and in providing the written information packet. This may include making alternative formats available (see Chapter 2). In addition, the HATC shall identify, give preference, and refer applicants (with a household member who has a mobility impairment), to accessible units.

**Persons with Limited English Proficiency**

The HATC will take reasonable steps to assure meaningful access by persons with limited English proficiency in accordance with Title VI of the Civil Rights Act of 1964 and Executive Order 13166 (see Chapter 2).

**V.E. OWNER SELECTION OF TENANTS**

The owner is responsible for developing written tenant selection procedures that are consistent with the purpose of improving housing opportunities for very low-income families and reasonably related to program eligibility and an applicant's ability to fulfill their obligations under the lease. *An owner must promptly notify in writing within 14 days any rejected applicant of the grounds for any rejection [24 CFR 983.253(b)].*

**Leasing [24 CFR 983.253(a)]**

During the term of the HAP contract, the owner must lease contract units to eligible families. The contract unit leased to the family must be the appropriate size unit for the size of the family, based on the HATC's subsidy standards.

#### **Reduction in HAP Contract Units Due to Vacancies [24 CFR 983.254(b)]**

If any contract units have been vacant for 120 or more days since owner notice of the vacancy, the HATC may give notice to the owner amending the HAP contract to reduce the number of contract units by subtracting the number of contract units (according to the bedroom size) that have been vacant for this period.

##### HATC Policy

*If any contract units have been vacant for 120 days, the HATC will give notice to the owner that the HAP contract will be amended to reduce the number of contract units that have been vacant for this period. The HATC will provide the notice to the owner within 10 business days of the 120<sup>th</sup> day of the vacancy. The amendment to the HAP contract will be effective the 1<sup>st</sup> day of the month following the date of the HATC's notice. This policy is subject to the conditions upon which the vacancy occurred and may not be enforced if the unit was vacant for any good-cause beyond the owner's ability to rent the unit.*

#### **V.F. TENANT SCREENING [24 CFR 983.255]**

##### **HATC Responsibility**

The HATC is not responsible or liable to the owner or any other person for the family's behavior or suitability for tenancy.

##### HATC Policy

*The HATC will not conduct screening to determine a PBV applicant family's suitability for tenancy.*

Upon request, the HATC shall provide the owner with an applicant family's current and prior address (as shown in HATC records) and the name and address (if known by the HATC) of the family's current landlord and any prior landlords.

In addition, the HATC may offer the owner other information the HATC may have about a family, including information about the tenancy history of family members or about drug trafficking and criminal activity by family members. The HATC will provide applicant families a description of the HATC policy on providing information to owners, and the HATC will give the same types of information to all owners.

##### HATC Policy

*The HATC will inform owners of their responsibility to screen prospective tenants, and will provide owners with the required known name and address information, at the time of the turnover HQS inspection or before. The HATC will provide any additional information to the owner, such as tenancy history, criminal history, if requested.*

##### **Owner Responsibility**

The owner is responsible for screening and selection of the family to occupy the owner's unit. When screening families the owner may consider a family's background with respect to the following factors:

- Payment of rent and utility bills;

- Caring for a unit and premises;
- Respecting the rights of other residents to the peaceful enjoyment of their housing;
- Drug-related criminal activity or other criminal activity that is a threat to the health, safety, or property of others; and
- Compliance with other essential conditions of tenancy.

## **SECTION VI: HOUSING ASSISTANCE PAYMENTS CONTRACT (HAP)**

### **VI.A. OVERVIEW**

The HATC shall enter into a HAP contract with an owner for units that are receiving PBV assistance. The purpose of the HAP contract is to provide housing assistance payments for eligible families. Housing assistance is paid for contract units leased and occupied by eligible families during the HAP contract term. The HAP contract shall be in the form required by HUD [24 CFR 983.202].

### **VI.B. HAP CONTRACT REQUIREMENTS**

#### **Contract Information [24 CFR 983.203]**

The HAP contract must specify the following information:

- The total number of contract units by number of bedrooms;
- The project's name, street address, city or county, state and zip code, block and lot number (if known), and any other information necessary to clearly identify the site and the building;
- The number of contract units in each building, the location of each contract unit, the area of each contract unit, and the number of bedrooms and bathrooms in each contract unit;
- Services, maintenance, and equipment to be supplied by the owner and included in the rent to owner;
- Utilities available to the contract units, including a specification of utility services to be paid by the owner (included in rent) and utility services to be paid by the tenant;
- Features provided to comply with program accessibility requirements of Section 504 of the Rehabilitation Act of 1973 and implementing regulations at 24 CFR part 8;
- The HAP contract term;
- The initial rent to owner for the first 12 months of the HAP contract term.

#### **Execution of the HAP Contract [24 CFR 983.204]**

##### **HATC Policy**

*The HA shall execute a HAP contract with the property owner upon HATC determining that:*

*All units pass HQS;*

*The Environmental Review is completed*

*The Rents and Utility Allowances have been approved and;*

*The Subsidy Layering Review is completed and approved.*

**Term of HAP Contract [24 CFR 983.205]**

*HATC Policy*

*The term of all PBV HAP contracts will be negotiated with the owner on a case-by-case basis and the initial term will be for 15 years*

**Termination by HATC [24 CFR 983.205(c)]**

The HAP contract shall provide that the term of the HATC's contractual commitment is subject to the availability of sufficient appropriated funding as determined by HUD or by the HATC in accordance with HUD instructions. For these purposes, sufficient funding means the availability of appropriations, and of funding under the ACC from such appropriations, to make full payment of housing assistance payments payable to the owner for any contract year in accordance with the terms of the HAP contract.

If it is determined that there may not be sufficient funding to continue housing assistance payments for all contract units and for the full term of the HAP contract, the HATC may terminate the HAP contract by notice to the owner. The termination must be implemented in accordance with HUD instructions.

**Termination by Owner [24 CFR 983.205(d)]**

If in accordance with program requirements the amount of rent to an owner for any contract unit is reduced below the amount of the rent to owner at the beginning of the HAP contract term, the owner may terminate the HAP contract by giving notice to the HATC. In this case, families living in the contract units shall be offered tenant-based assistance.

**Remedies for HQS Violations [24 CFR 983.207(b)]**

*HATC Policy*

*The HATC will abate and terminate PBV HAP contracts for non-compliance with HQS in accordance with the policies used in the tenant-based voucher program. These policies are contained in Section 8-II.G., Enforcing Owner Compliance. If a contract is terminated, the tenant will be offered tenant-based assistance*

**VI.C. AMENDMENTS TO THE HAP CONTRACT**

**Substitution of Contract Units [24 CFR 983.206(a)]**

At the HATC's discretion and subject to all PBV requirements, the HAP contract may be amended to substitute a different unit with the same number of bedrooms for a previously covered contract unit. Before any such substitution can take place, the HATC must inspect the proposed unit and determine the reasonable rent for the unit. If it is determined that there be a rent adjustment (increase or decrease), all units of same type shall have the rent adjustments made under the HAP Contract

**Addition of Contract Units [24 CFR 983.206(b)]**

HATC Policy

*The HATC will consider adding contract units to the HAP contract within three years of the HAP execution date, when the HATC determines that additional housing is needed to serve eligible low-income families. Circumstances may include, but are not limited to:*

*The local housing inventory is reduced due to a disaster (either due to loss of housing units, or an influx of displaced families); and*

*Voucher holders are having difficulty finding units that meet program requirements.*

*The adding of additional units shall be consistent with the original RFP. For example: if the RFP did not include Exception units then adding units would be limited to the 25% unit limitation.*

*The addition of units can not cause the HA to exceed 20% of the HA's funding for the Voucher Program.*

**VI.D. HAP CONTRACT YEAR, ANNIVERSARY AND EXPIRATION DATES [24 CFR 983.206(c) and 983.302(e)]**

The HAP contract year is the period of 12 calendar months preceding each annual anniversary of the HAP contract during the HAP contract term. The initial contract year is calculated from the first day of the first calendar month of the HAP contract term.

The annual anniversary of the HAP contract is the first day of the first calendar month after the end of the preceding contract year.

There is a single annual anniversary and expiration date for all units under a particular HAP contract, even in cases where contract units are placed under the HAP contract in stages (on different dates) or units are added by amendment. The anniversary and expiration dates for all units coincide with the dates for the contract units that were originally placed under contract.

**VI.E. OWNER RESPONSIBILITIES UNDER THE HAP [24 CFR 983.209]**

When the owner executes the HAP contract s/he certifies that at such execution and at all times during the term of the HAP contract:

- All contract units are in good condition and the owner is maintaining the premises and contract units in accordance with HQS;
- The owner is providing all services, maintenance, equipment and utilities as agreed to under the HAP contract and the leases;
- Each contract unit for which the owner is receiving HAP, is leased to an eligible family referred by the HATC, and the lease is in accordance with the HAP contract and HUD requirements;
- To the best of the owner's knowledge the family resides in the contract unit for which the owner is receiving HAP, and the unit is the family's only residence;

- The owner (including a principal or other interested party) is not the spouse, parent, child, grandparent, grandchild, sister, or brother of any member of a family residing in a contract unit;
- The amount of the HAP the owner is receiving is correct under the HAP contract;
- The rent for contract units does not exceed rents charged by the owner for comparable unassisted units;
- Except for HAP and tenant rent, the owner has not received and will not receive any other payment or consideration for rental of the contract unit; and
- The family does not own or have any interest in the contract unit.

## **VI.F. ADDITIONAL HAP REQUIREMENTS**

### **Housing Quality and Design Requirements [24 CFR 983.101(e) and 983.207(a)]**

#### HATC Policy

*The HATC will identify the need for any special features on a case-by-case basis depending on the intended occupancy of the PBV project. The HATC will specify any special design standards or additional requirements in the invitation for PBV proposals, and the HAP contract.*

## **SECTION VII: OCCUPANCY**

### **VII.A. OVERVIEW**

After an applicant has been selected and determined eligible by the HATC, the family will sign the lease and occupancy of the unit will begin.

### **VII.B. LEASE [24 CFR 983.256]**

The tenant must have legal capacity to enter a lease under state and local law. *Legal capacity* means that the tenant is bound by the terms of the lease and may enforce the terms of the lease against the owner.

#### **Form of Lease [24 CFR 983.256(b)]**

The tenant and the owner must enter into a written lease agreement that is signed by both parties. The lease must include a HUD-required tenancy addendum. The tenancy addendum must include, word-for-word, all provisions required by HUD.

The Owner will use the HATC model lease.

#### **Tenancy Addendum [24 CFR 983.256(d)]**

The tenancy addendum in the lease must state:

- The program tenancy requirements;
- The composition of the household as approved by the HATC (the names of family members and any HATC-approved live-in aide);
- All provisions in the HUD-required tenancy addendum must be included in the lease. The terms of the tenancy addendum prevail over other provisions of the lease.

**Initial Term and Lease Renewal [24 CFR 983.256(f) and 983.257(b)]**

The initial lease term must be for at least one year. Upon expiration of the lease, an owner may renew the lease, refuse to renew the lease for “good cause,” or refuse to renew the lease without good cause. If the owner refuses to renew the lease without good cause, the HATC shall provide the family with a tenant-based voucher and remove the unit from the PBV HAP contract.

**Changes in the Lease [24 CFR 983.256(e)]**

The owner must notify the HATC in advance of any proposed change in the lease regarding the allocation of tenant and owner responsibilities for utilities. Such changes may only be made if approved by the HATC and in accordance with the terms of the lease relating to its amendment. The HATC must redetermine reasonable rent, in accordance with program requirements, based on any change in the allocation of the responsibility for utilities between the owner and the tenant. The redetermined reasonable rent will be used in calculation of the rent to owner from the effective date of the change.

**Owner Termination of Tenancy [24 CFR 983.257]**

The owner of a PBV unit may terminate tenancy for the same reasons an owner may in the tenant-based voucher program (see Section 12-III.B. and 24 CFR 982.310). In the PBV program, terminating tenancy for “good cause” does not include doing so for a business or economic reason, or a desire to use the unit for personal or family use or other non-residential purpose.

**Tenant Absence from the Unit [24 CFR 983.256(g) and 982.312(a)]**

The family’s assistance must be terminated if they are absent from the unit for more than 180 consecutive days.

**Security Deposits [24 CFR 983.258]**

The owner will collect a security deposit from the tenant equal to one month’s contract rent.

When the tenant moves out of a contract unit, the owner, subject to state and local law, may use the security deposit, including any interest on the deposit, in accordance with the lease, as reimbursement for any unpaid tenant rent, damages to the unit, or other amounts owed by the tenant under the lease.

The owner must give the tenant a written list of all items charged against the security deposit and the amount of each item. After deducting the amount used to reimburse the owner, the owner must promptly refund the full amount of the balance to the tenant.

If the security deposit does not cover the amount owed by the tenant under the lease, the owner may seek to collect the balance from the tenant. The HATC has no liability or responsibility for payment of any amount owed by the family to the owner.

## **VII.C. MOVES**

### **Overcrowded, Under-Occupied, and Accessible Units [24 CFR 983.259]**

#### *HATC Policy*

*The HATC will notify the family and the owner of the family's need to move based on the occupancy of a wrong-size or accessible unit within 10 business days of the HATC's determination. The HATC will offer the family the following types of continued assistance in the following order, based on the availability of assistance:*

*PBV assistance in the same project;*

*or*

*Tenant-based voucher assistance.*

If the HATC offers the family a tenant-based voucher, the HATC shall terminate the housing assistance payments for a wrong-sized or accessible unit at expiration of the term of the family's voucher (including any extension granted by the HATC).

If the HATC offers the family another form of assistance that is not a tenant-based voucher, and the family does not accept the offer, does not move out of the PBV unit within a reasonable time as determined by the HATC, or both, the HATC must terminate the housing assistance payments for the unit at the expiration of a reasonable period as determined by the HATC.

#### *HATC Policy*

*When the HATC offers a family another form of assistance that is not a tenant-based voucher, the family will be given 30 days from the date of the offer to accept the offer and move out of the PBV unit. If the family does not move out within this 30-day time frame, the HATC will terminate the housing assistance payments at the expiration of this 30-day period.*

*The HATC may make exceptions to this 30-day period if needed for reasons beyond the family's control such as death, serious illness, or other medical emergency of a family member.*

### **Family Right to Move [24 CFR 983.260]**

The family may terminate the lease at any time after the first year of occupancy. The family must give advance written notice to the owner in accordance with the lease and provide a copy of such notice to the HATC.

## **SECTION VIII: DETERMINING RENT TO OWNER**

### **VIII.A. OVERVIEW**

The amount of the initial rent to an owner of units receiving PBV assistance is established at the beginning of the HAP contract term. During the term of the HAP contract, the rent to owner is redetermined at the owner's request in accordance with

program requirements, and at such time that there is a five percent or greater decrease in the published FMR.

#### **VIII.B. RENT LIMITS [24 CFR 983.301]**

Except for certain tax credit units (discussed below), the rent to owner must not exceed the lowest of the following amounts:

- An amount determined by the HATC, not to exceed 110 percent of the applicable fair market rent (or any HUD-approved exception payment standard) for the unit bedroom size minus any utility allowance;
- The reasonable rent; or
- The rent requested by the owner.

#### **Certain Tax Credit Units [24 CFR 983.301(c)]**

The rents for tax credit units cannot exceed the lesser of:

- the tax credit rent minus the utility allowance;
- the reasonable rent; or
- the rent requested by the owner.

*Tax credit rent* is the rent charged for comparable units of the same bedroom size in the building that also receive the low-income housing tax credit but do not have any additional rental assistance (e.g., tenant-based voucher assistance).

#### **Use of FMRs, Exception Payment Standards, and Utility Allowances [24 CFR 983.301(f)]**

When determining the initial rent to owner, the HATC shall use the most recently published FMR in effect and the utility allowance schedule in effect at execution of the HAP contract. When redetermining the rent to owner, the HATC shall use the most recently published FMR and the utility allowance schedule in effect at the time of redetermination. At its discretion, the HATC may for initial rent, use the amounts in effect at any time during the 30-day period immediately before the beginning date of the HAP contract, or for redeterminations of rent, the 30-day period immediately before the redetermination date.

The same utility allowance schedule applies to both the tenant-based and project-based voucher programs.

##### *HATC Policy*

*The HA will use the FMR and or utility allowances in effect on the effective date of the HAP contract. Upon written request by the owner, the HATC will consider using the FMR or utility allowances in effect during the 30-day period before the start date of the HAP, or redetermination of rent. The owner must explain the need to use the previous FMRs or utility allowances and include documentation in support of the request. The HATC will review and make a decision based on the circumstances and merit of each request.*

*In addition to considering a written request from an owner, the HATC may decide to use the FMR or utility allowances in effect during the 30-day period before the start date of the HAP, or redetermination of rent, if the HATC determines it is necessary due to HATC budgetary constraints.*

**The HATC may use a separate Payment Standard other than the HCV Payment Standards in effect for PBV units Redetermination of Rent [24 CFR 983.302]**

The HATC shall redetermine the rent to owner upon the owner's request or when there is a five percent or greater decrease in the published FMR.

**Rent Increase**

If an owner wishes to request an increase in the rent to owner from the HATC, it must be requested at the annual anniversary of the HAP contract (see Section V.D.). There are no provisions in the PBV program for special adjustments (e.g., adjustments that reflect increases in the actual and necessary expenses of owning and maintaining the units which have resulted from substantial general increases in real property taxes, utility rates, or similar costs).

*HATC Policy*

*An owner's request for a rent increase must be submitted to the HATC 60 days prior to the anniversary date of the HAP contract, and must include the new rent amount the owner is proposing.*

The HATC shall not approve and the owner may not receive any increase of rent to owner until and unless the owner has complied with requirements of the HAP contract, including compliance with HQS. The owner may not receive any retroactive increase of rent for any period of noncompliance.

**Rent Decrease**

If there is a decrease in the rent to owner, as established in accordance with program requirements such as a change in the FMR or exception payment standard, or reasonable rent amount, the rent to owner must be decreased regardless of whether the owner requested a rent adjustment.

**Notice of Rent Change**

The rent to owner is redetermined by written notice by the HATC to the owner specifying the amount of the redetermined rent. The HATC notice of rent adjustment constitutes an amendment of the rent to owner specified in the HAP contract. The adjusted amount of rent to owner applies for the period of 12 calendar months from the annual anniversary of the HAP contract.

**VIII.C. REASONABLE RENT [24 CFR 983.303]**

At the time the initial rent is established and all times during the term of the HAP contract, the rent to owner for a contract unit may not exceed the reasonable rent for the unit as determined by the HATC.

**When Rent Reasonable Determinations are Required**

The HATC shall redetermine the reasonable rent for a unit receiving PBV assistance whenever any of the following occur:

- There is a five percent or greater decrease in the published FMR in effect 60 days before the contract anniversary (for the unit sizes specified in the HAP contract) as compared with the FMR that was in effect one year before the contract anniversary date;
- The HATC approves a change in the allocation of responsibility for utilities between the owner and the tenant;
- The HAP contract is amended to substitute a different contract unit in the same building; or
- There is any other change that may substantially affect the reasonable rent.

#### **Determining Reasonable Rent**

The reasonable rent of a unit receiving PBV assistance must be determined by comparison to rent for other comparable unassisted units. When making this determination, the HATC must consider factors that affect market rent. Such factors include the location, quality, size, type and age of the unit, as well as the amenities, housing services maintenance, and utilities to be provided by the owner.

#### **Owner Certification of Reasonable Rent**

By accepting each monthly housing assistance payment, the owner certifies that the rent to owner is not more than rent charged by the owner for other comparable unassisted units in the premises. At any time, the HATC may require the owner to submit information on rents charged by the owner for other units in the premises or elsewhere.

### **VIII.D. EFFECT OF OTHER SUBSIDY AND RENT CONTROL**

In addition to the rent limits discussed in Section VIII.B above, other restrictions may limit the amount of rent to owner in a PBV unit. In addition, certain types of subsidized housing are not even eligible to receive PBV assistance (see Section 17-II.D).

#### **Other Subsidy [24 CFR 983.304]**

At its discretion, a HATC may reduce the initial rent to owner because of other governmental subsidies, including tax credit or tax exemption, grants, or other subsidized financing.

For units receiving assistance under the HOME program, rents may not exceed rent limits as required by that program.

For units in any of the following types of federally subsidized projects, the rent to owner may not exceed the subsidized rent (basic rent) or tax credit rent as determined in accordance with requirements for the applicable federal program:

- An insured or non-insured Section 236 project;
- A formerly insured or non-insured Section 236 project that continues to receive Interest Reduction Payment following a decoupling action;
- A Section 221(d)(3) below market interest rate (BMIR) project;
- A Section 515 project of the Rural Housing Service;
- A project receiving low-income housing tax credits;

- Any other type of federally subsidized project specified by HUD.

### ***Combining Subsidy***

Rent to owner may not exceed any limitation required to comply with HUD subsidy layering requirements.

## **SECTION IX: PAYMENTS TO OWNER**

### **IX.A. HOUSING ASSISTANCE PAYMENTS [24 CFR 983.351]**

During the term of the HAP contract, the HATC shall make housing assistance payments to the owner in accordance with the terms of the HAP contract. During the term of the HAP contract, payments must be made for each month that a contract unit complies with HQS and is leased to and occupied by an eligible family. The housing assistance payment shall be paid to the owner on or about the first day of the month for which payment is due, unless the owner and the HATC agree on a later date.

***The HATC shall not make any housing assistance payment to the owner for any month after the month when the family moves out of the unit (even if household goods or property are left in the unit).***

In order to receive housing assistance payments, the owner must comply with all provisions of the HAP contract. Unless the owner complies with all provisions of the HAP contract, the owner does not have a right to receive housing assistance payments.

### **IX.B. TENANT RENT TO OWNER [24 CFR 983.353]**

The tenant rent is the portion of the rent to owner paid by the family. The amount of tenant rent is determined by the HATC in accordance with MTW Policies. Any changes in the amount of tenant rent will be effective on the date stated in the HATC notice to the family and owner.

The family is responsible for paying the tenant rent. The amount of the tenant rent determined by the HATC is the maximum amount the owner may charge the family for rental of a contract unit. The tenant rent covers all housing services, maintenance, equipment, and utilities to be provided by the owner. The owner may not demand or accept any rent payment from the tenant in excess of the tenant rent as determined by the HATC. The owner must immediately return any excess payment to the tenant.

### **Tenant and HATC Responsibilities**

The family is not responsible for the portion of rent to owner that is covered by the housing assistance payment and the owner may not terminate the tenancy of an assisted family for nonpayment by the HATC.

Likewise, the HATC is responsible only for making the housing assistance payment to the owner in accordance with the HAP contract. The HATC is not responsible for paying tenant rent, or any other claim by the owner, including damage to the unit. The HATC may not use housing assistance payments or other program funds (including administrative fee reserves) to pay any part of the tenant rent or other claim by the owner.

## **IX.C. OTHER FEES AND CHARGES [24 CFR 983.354]**

### **Other Charges by Owner**

The owner may not charge extra amounts for items customarily included in rent in the locality or provided at no additional cost to unsubsidized tenants in the premises.

## APPENDIX D



**Tulare County, California**

**S1901. Income in the Past 12 Months (In 2007 Inflation-Adjusted Dollars)**

Data Set: **2005-2007 American Community Survey 3-Year Estimates**

Survey: **American Community Survey**

NOTE: For information on confidentiality protection, sampling error, nonsampling error, and definitions, see [Survey Methodology](#).

Subject	Households	Margin of Error	Families	Margin of Error	Married-couple families	Margin of Error	Nonfamily households	Margin of Error
<b>Total</b>	<b>121,457</b>	<b>+/-998</b>	<b>94,971</b>	<b>+/-1,393</b>	<b>68,056</b>	<b>+/-1,438</b>	<b>26,486</b>	<b>+/-1,378</b>
Less than \$10,000	7.6%	+/-0.7	6.4%	+/-0.7	3.2%	+/-0.7	16.0%	+/-2.1
\$10,000 to \$14,999	6.9%	+/-0.6	5.7%	+/-0.7	4.1%	+/-0.7	14.4%	+/-1.4
\$15,000 to \$24,999	14.5%	+/-0.8	13.8%	+/-0.8	11.8%	+/-0.9	18.9%	+/-2.1
\$25,000 to \$34,999	13.8%	+/-0.9	13.8%	+/-1.1	11.9%	+/-1.1	12.5%	+/-1.8
\$35,000 to \$49,999	16.0%	+/-1.0	16.3%	+/-1.1	16.5%	+/-1.2	13.6%	+/-1.8
\$50,000 to \$74,999	17.0%	+/-0.9	17.3%	+/-1.1	19.2%	+/-1.4	12.5%	+/-1.8
\$75,000 to \$99,999	10.8%	+/-0.8	11.5%	+/-0.9	13.8%	+/-1.2	6.6%	+/-1.4
\$100,000 to \$149,999	9.1%	+/-0.7	10.2%	+/-0.8	13.1%	+/-1.0	4.0%	+/-1.0
\$150,000 to \$199,999	2.4%	+/-0.3	2.8%	+/-0.4	3.5%	+/-0.5	1.0%	+/-0.5
\$200,000 or more	1.9%	+/-0.4	2.2%	+/-0.4	3.0%	+/-0.5	0.5%	+/-0.5
Median income (dollars)	41,837	+/-901	44,212	+/-1,109	52,501	+/-1,621	25,426	+/-1,645
Mean income (dollars)	56,280	+/-1,487	59,916	+/-1,818	68,973	+/-2,279	37,199	+/-1,996
<b>PERCENT IMPUTED</b>								
Household income in the past 12 months	34.9%	(X)	(X)	(X)	(X)	(X)	(X)	(X)
Family income in the past 12 months	(X)	(X)	35.2%	(X)	(X)	(X)	(X)	(X)
Nonfamily income in the past 12 months	(X)	(X)	(X)	(X)	(X)	(X)	30.7%	(X)

Source: U.S. Census Bureau, 2005-2007 American Community Survey

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see [Accuracy of the Data](#)). The effect of nonsampling error is not represented in these tables.

Notes:

- While the 2007 American Community Survey (ACS) data generally reflect the December 2006 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. The 2007 Puerto Rico Community Survey (PRCS) data generally reflect the December 2005 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in PRCS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities.
- Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

1. An '\*\*\*' entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.
2. An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.
3. An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.
4. An '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.
5. An '\*\*\*\*' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.
6. An '\*\*\*\*\*' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.
7. An 'N' entry in the estimate and margin of error columns indicates that data for this geographic area cannot be displayed because the number of sample cases is too small.
8. An '(X)' means that the estimate is not applicable or not available.

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**Fresno County, California**

**S1901. Income in the Past 12 Months (In 2007 Inflation-Adjusted Dollars)**

Data Set: **2005-2007 American Community Survey 3-Year Estimates**

Survey: **American Community Survey**

NOTE: For information on confidentiality protection, sampling error, nonsampling error, and definitions, see [Survey Methodology](#).

Subject	Households	Margin of Error	Families	Margin of Error	Married-couple families	Margin of Error	Nonfamily households	Margin of Error
<b>Total</b>	<b>276,929</b>	<b>+/-1,807</b>	<b>201,521</b>	<b>+/-2,485</b>	<b>138,609</b>	<b>+/-2,422</b>	<b>75,408</b>	<b>+/-2,263</b>
Less than \$10,000	7.8%	+/-0.5	6.2%	+/-0.6	2.1%	+/-0.4	15.2%	+/-1.2
\$10,000 to \$14,999	7.4%	+/-0.5	5.2%	+/-0.5	3.0%	+/-0.4	14.8%	+/-1.3
\$15,000 to \$24,999	13.1%	+/-0.6	12.4%	+/-0.8	8.9%	+/-0.7	16.1%	+/-1.2
\$25,000 to \$34,999	11.9%	+/-0.5	11.6%	+/-0.7	10.9%	+/-0.7	12.3%	+/-1.1
\$35,000 to \$49,999	14.4%	+/-0.6	14.0%	+/-0.7	13.9%	+/-0.8	14.2%	+/-1.2
\$50,000 to \$74,999	17.6%	+/-0.7	18.0%	+/-0.8	19.6%	+/-0.9	15.0%	+/-1.1
\$75,000 to \$99,999	11.9%	+/-0.6	13.6%	+/-0.7	16.5%	+/-1.0	5.9%	+/-0.9
\$100,000 to \$149,999	10.4%	+/-0.5	12.3%	+/-0.6	16.0%	+/-0.9	4.2%	+/-0.8
\$150,000 to \$199,999	3.2%	+/-0.3	3.6%	+/-0.3	5.0%	+/-0.5	1.5%	+/-0.6
\$200,000 or more	2.5%	+/-0.3	3.0%	+/-0.4	4.2%	+/-0.5	0.9%	+/-0.4
Median income (dollars)	44,979	+/-838	50,665	+/-1,049	63,789	+/-1,484	27,653	+/-1,215
Mean income (dollars)	60,112	+/-884	66,129	+/-1,188	78,776	+/-1,576	39,689	+/-1,580
<b>PERCENT IMPUTED</b>								
Household income in the past 12 months	33.9%	(X)	(X)	(X)	(X)	(X)	(X)	(X)
Family income in the past 12 months	(X)	(X)	34.6%	(X)	(X)	(X)	(X)	(X)
Nonfamily income in the past 12 months	(X)	(X)	(X)	(X)	(X)	(X)	28.4%	(X)

Source: U.S. Census Bureau, 2005-2007 American Community Survey

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see [Accuracy of the Data](#)). The effect of nonsampling error is not represented in these tables.

Notes:

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- Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

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7. An 'N' entry in the estimate and margin of error columns indicates that data for this geographic area cannot be displayed because the number of sample cases is too small.
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## Fresno County Profile

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### About this area:

Located in the fertile Central Valley, Fresno is the sixth-largest county in land area in the state, encompassing 6,000 square miles. To the west, Fresno shares its border with San Benito and Monterey counties. Other neighbors include Merced and Madera to the north, Mono and Inyo to the east, and Kings and Tulare to the south.

### Employment and Wages

#### Unemployment Rate and Labor Force (Not Seasonally Adjusted) [\[Top\]](#)

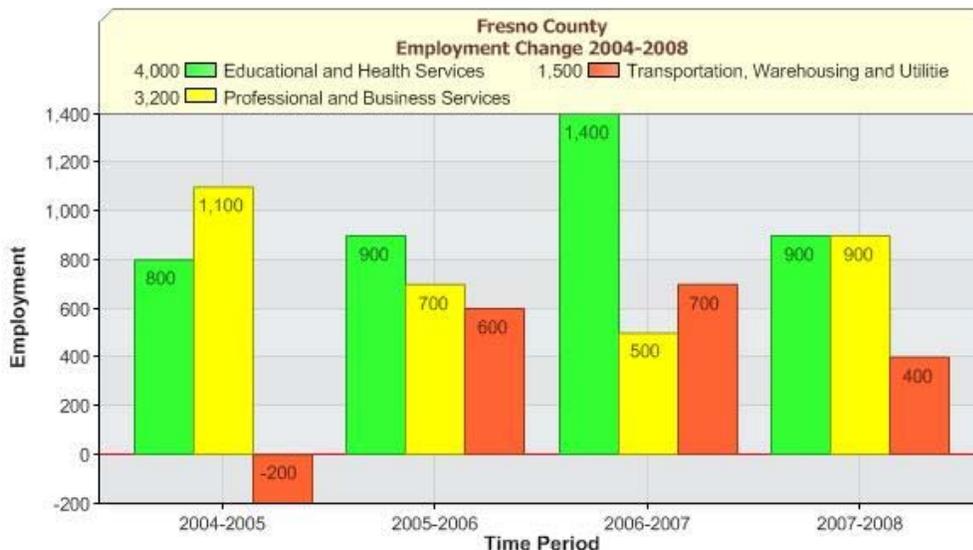
Area	Year	Time Period	Labor Force	No. of Employed	No. of Unemployed	Unemployment Rate
Fresno County	2009	May	439,100	371,500	67,700	15.4

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#### Employment by Industry (Not Seasonally Adjusted) [\[Top\]](#)

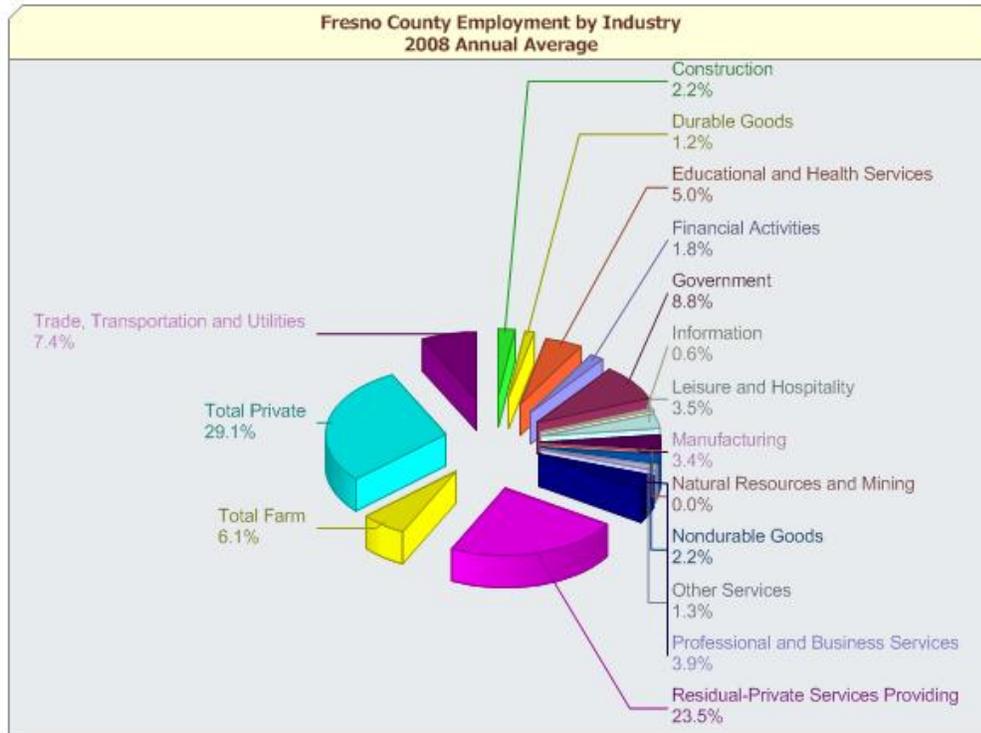
Year	Time Period	CES Industry Title	No. of Employed
2009	May	Total Wage and Salary	348,600
2009	May	Total Nonfarm	295,600
2009	May	Service Providing	254,700
2009	May	Total Private	223,900
2009	May	Residual-Private Services Providing	183,000

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**Occupations with Fastest Job Growth (% change)**

Occupation

- [Network Systems and Data Communications Analysts](#)
- [Computer Software Engineers, Applications](#)
- [Cargo and Freight Agents](#)
- [Security and Fire Alarm Systems Installers](#)
- [Pharmacy Technicians](#)
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Estimated Year - Projected Year	Employment		Employment Change	
	Estimated	Projected	Number	Percent
2006 - 2016	280	420	140	50.0
2006 - 2016	430	600	170	39.5
2006 - 2016	50	70	20	40.0
2006 - 2016	110	150	40	36.4
2006 - 2016	550	750	200	36.4

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**[Projections of Employment by Industry](#)**

**High Wage Occupations**

Occupation

Occupation	Year	Time Period	Hourly Mean	Hourly by Percentile		
				25th	Median	75th
<a href="#">Chief Executives</a>	2009	1st Qtr	\$73.17	\$48.66	\$64.83	N/A
<a href="#">Lawyers</a>	2009	1st Qtr	\$64.15	\$45.64	\$59.26	\$78.50
<a href="#">Pharmacists</a>	2009	1st Qtr	\$60.03	\$54.51	\$59.24	\$63.87
<a href="#">Psychologists, All Other</a>	2009	1st Qtr	\$55.67	\$42.73	\$46.27	\$49.99
<a href="#">General and Operations Managers</a>	2009	1st Qtr	\$51.94	\$31.05	\$42.66	\$64.05

[\[Top\]](#)

Data for Fresno County is not available. Data for Fresno MSA has been displayed for High Wage Occupations

**Economic Indicators**

**Building Permits (US Census Bureau)**

Type of Permit

Type of Permit	Year	Time Period	No. of Permits	Total Costs
Multi-Family	2008	Annual	309	\$31,189,309
Single Family	2008	Annual	1,540	\$270,236,745
Total all types construction permits	2008	Annual	1,849	\$301,426,054

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**Consumer Price Index (US BLS & Calif. DIR)**[\[Top\]](#)

Area	Consumer Price Index		2007	Time Period	2006	% Change
	Time Period	Annual				
United States	Annual	207.3	Annual	201.6	2.8	
California	Annual	217.4	Annual	210.5	3.3	

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Data for Fresno County is not available. Data for California has been displayed for Consumer Price Index (US BLS &amp; Calif. DIR)

**Median Price of Existing Homes Sold (Calif. Assoc. of Realtors)**[\[Top\]](#)

Year	Time Period	Type	Median Price
2009	Apr	Median Price of Homes Sold	\$149,000

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Tax Type Description	Year	Time Period	Tax Revenue
Alcoholic Beverage Taxes and Fees	2006	Annual	\$333,789,000
Bank and Corporation (Income) Taxes	2006	Annual	\$11,157,898,000
Cigarette Tax	2006	Annual	\$1,078,536,000
Horse Racing (Parimutuel) License Fees	2006	Annual	\$37,527,000
Estate, Inheritance and Gift Taxes	2006	Annual	\$6,348,000

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Data for Fresno County is not available. Data for California has been displayed for State Revenues by Source

**Taxable Sales (Calif. Board of Equalization)**[\[Top\]](#)

Year	Time Period	Sales Type Description	Sales
2007	Annual	Retail	\$12,308,257,000

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Area	Year	Time Period	Source	Population
Fresno County	2008	Annual	California Dept of Finance	931,098

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Income Type	Year	Time Period	Income	Population
Median Household Income - Small Area Income Estimates (Census Bureau)	2007	Annual	\$46,547	N/A

[More Areas](#) [Historical Data](#) [Get More Info \(Data Library\)](#)**County-to-County Commute Patterns (US Census Bureau)**[\[Top\]](#)

Year	Time Period	Area of Residence	Area of WorkPlace	Number of Workers
2000	Census	Fresno County , CA	Fresno County , CA	273,212
2000	Census	Madera County , CA	Fresno County , CA	9,765
2000	Census	Fresno County , CA	Madera County , CA	7,674
2000	Census	Tulare County , CA	Fresno County , CA	6,418
2000	Census	Fresno County , CA	Tulare County , CA	5,374

[More](#) [Historical Data](#)**Job Openings & Training Providers****Job Openings from JobCentral National Labor Exchange**[\[Top\]](#)[Job Openings](#)

**Training Providers in Area**[\[Top\]](#)

Provider Name	Provider Type	Location
<a href="#">Sanger Adult School</a>	Schools with Occupational Programs (ROP)	Sanger,CA
<a href="#">Fresno Adult School</a>	Schools with Occupational Programs (ROP)	Fresno,CA
<a href="#">California State University, Fresno</a>	University or College (four-year school)	Fresno,CA
<a href="#">Fresno City College - Training Institute</a>	Community Colleges (two-year school)	Fresno,CA
<a href="#">Fresno City College</a>	Community Colleges (two-year school)	Fresno,CA
<a href="#">More</a>		

**Related Links**[View Employers By Occupation](#)[View Employers By Industry](#)[Local Area Comparisons](#)**Related Articles and Publications**[New Career Resources - Info on Good-Paying, Hands-On Jobs, 12/23/2008](#)[Methodology for Generating Labor Force Data, 12/23/2008](#)[County-to-County Commute Patterns, 12/22/2008](#)[Ask an Economist.... 12/2/2008](#)[Why Does Civilian Employment Differ From Total Industry Employment?, 7/19/2006](#)



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## Tulare County Profile

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### About this area:

Tulare County is located in the San Joaquin Valley, near the geographic center of California. Fresno borders to the north, Inyo to the east, Kern to the south, and Kings borders to the west. Although primarily an agricultural county, almost half of Tulare's area is devoted to national parks and forests, including the popular Sequoia and Kings Canyon National Parks, and Inyo and Sequoia National Forests. These natural resources, among others, provide year-round recreational opportunities.

### Employment and Wages

#### Unemployment Rate and Labor Force (Not Seasonally Adjusted)

[\[Top\]](#)

Area	Year	Time Period	Labor Force	No. of Employed	No. of Unemployed	Unemployment Rate
Tulare County	2009	May	216,800	185,800	31,000	14.3

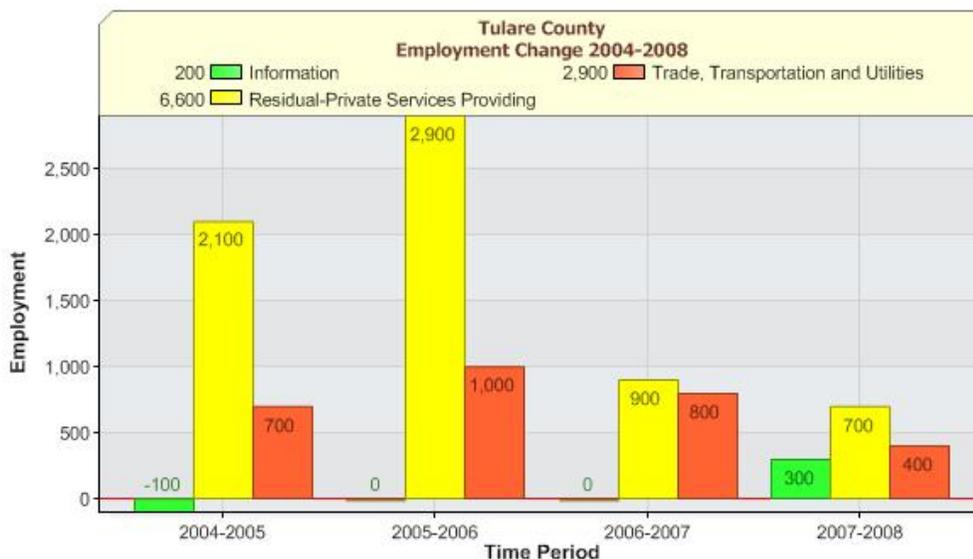
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#### Employment by Industry (Not Seasonally Adjusted)

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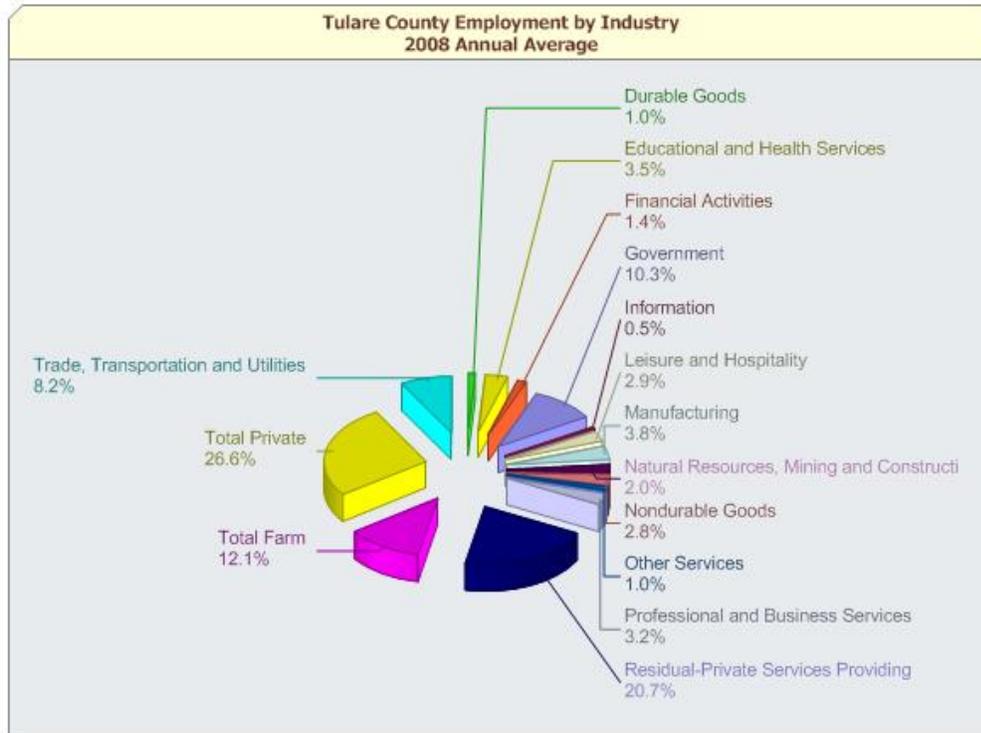
Year	Time Period	CES Industry Title	No. of Employed
2009	May	Total Wage and Salary	159,700
2009	May	Total Nonfarm	110,600
2009	May	Service Providing	94,100
2009	May	Total Private	78,300
2009	May	Residual-Private Services Providing	61,800

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**Occupations with Fastest Job Growth (% change)**

Occupation	Estimated Year - Projected Year	Employment		Employment Change	
		Estimated	Projected	Number	Percent
<a href="#">Advertising Sales Agents</a>	2006 - 2016	110	180	70	63.6
<a href="#">Network Systems and Data Communications Analysts</a>	2006 - 2016	60	90	30	50.0
<a href="#">Computer Science Teachers, Postsecondary</a>	2006 - 2016	60	90	30	50.0
<a href="#">Pharmacy Technicians</a>	2006 - 2016	280	410	130	46.4
<a href="#">Water and Liquid Waste Treatment Plant Workers</a>	2006 - 2016	90	130	40	44.4

**Projections of Employment by Industry**

**High Wage Occupations**

Occupation	Year	Time Period	Hourly Mean	Hourly by Percentile		
				25th	Median	75th
<a href="#">Internists, General</a>	2009	1st Qtr	\$76.21	\$66.72	\$74.30	N/A
<a href="#">Family and General Practitioners</a>	2009	1st Qtr	\$64.34	\$46.02	\$64.35	\$78.73
<a href="#">Pharmacists</a>	2009	1st Qtr	\$59.60	\$56.80	\$60.56	\$64.33
<a href="#">Chief Executives</a>	2009	1st Qtr	\$58.30	\$11.10	\$59.36	N/A
<a href="#">Education Administrators, All Other</a>	2009	1st Qtr	\$56.85	\$40.18	\$59.12	\$69.13

Data for Tulare County is not available. Data for Visalia-Porterville MSA has been displayed for High Wage Occupations

**Economic Indicators**

**Building Permits (US Census Bureau)**

Type of Permit	Year	Time Period	No. of Permits	Total Costs
Multi-Family	2008	Annual	212	\$16,383,060
Single Family	2008	Annual	1,275	\$221,877,023
Total all types construction permits	2008	Annual	1,487	\$238,260,083

[More Areas](#) [Historical Data](#)

**Consumer Price Index (US BLS & Calif. DIR)**[\[Top\]](#)

Area	Consumer Price Index		2007	2006	% Change	
	Time Period		Time Period			
United States	Annual		207.3	Annual	201.6	2.8
California	Annual		217.4	Annual	210.5	3.3

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Data for Tulare County is not available. Data for California has been displayed for Consumer Price Index (US BLS &amp; Calif. DIR)

**Median Price of Existing Homes Sold (Calif. Assoc. of Realtors)**[\[Top\]](#)

Year	Time Period	Type	Median Price
2009	Apr	Median Price of Homes Sold	\$125,250

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Tax Type Description	Year	Time Period	Tax Revenue
Alcoholic Beverage Taxes and Fees	2006	Annual	\$333,789,000
Bank and Corporation (Income) Taxes	2006	Annual	\$11,157,898,000
Cigarette Tax	2006	Annual	\$1,078,536,000
Horse Racing (Parimutuel) License Fees	2006	Annual	\$37,527,000
Estate, Inheritance and Gift Taxes	2006	Annual	\$6,348,000

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Data for Tulare County is not available. Data for California has been displayed for State Revenues by Source

**Taxable Sales (Calif. Board of Equalization)**[\[Top\]](#)

Year	Time Period	Sales Type Description	Sales
2007	Annual	Retail	\$4,897,164,000

[More Areas](#) [Historical Data](#)**Population and Census Data****Population**[\[Top\]](#)

Area	Year	Time Period	Source	Population
Tulare County	2008	Annual	California Dept of Finance	435,254

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Income Type	Year	Time Period	Income	Population
Median Household Income - Small Area Income Estimates (Census Bureau)	2007	Annual	\$40,444	N/A

[More Areas](#) [Historical Data](#) [Get More Info \(Data Library\)](#)**County-to-County Commute Patterns (US Census Bureau)**[\[Top\]](#)

Year	Time Period	Area of Residence	Area of WorkPlace	Number of Workers
2000	Census	Tulare County , CA	Tulare County , CA	115,300
2000	Census	Tulare County , CA	Fresno County , CA	6,418
2000	Census	Fresno County , CA	Tulare County , CA	5,374
2000	Census	Tulare County , CA	Kern County , CA	3,603
2000	Census	Tulare County , CA	Kings County , CA	3,340

[More](#) [Historical Data](#)**Job Openings & Training Providers****Job Openings from JobCentral National Labor Exchange**[\[Top\]](#)[Job Openings](#)

**Training Providers in Area**[\[Top\]](#)

Provider Name	Provider Type	Location
<a href="#">Tulare Co Office of Education/SEE</a>	Schools with Occupational Programs (ROP)	Visalia,CA
<a href="#">Truck Driving Academy - Tulare</a>	Apprenticeship, Business, Career, & Tech Schools	Tulare,CA
<a href="#">Chapman University - Visalia</a>	University or College (four-year school)	Visalia,CA
<a href="#">Golden State College</a>	Apprenticeship, Business, Career, & Tech Schools	Visalia,CA
<a href="#">Community Services &amp; Employment Training</a>	Apprenticeship, Business, Career, & Tech Schools	Visalia,CA
<a href="#">More</a>		

**Related Links**

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[View Employers By Industry](#)  
[Local Area Comparisons](#)

**Related Articles and Publications**

[New Career Resources - Info on Good-Paying, Hands-On Jobs, 12/23/2008](#)

[Methodology for Generating Labor Force Data, 12/23/2008](#)

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STATE:CALIFORNIA

-----I N C O M E L I M I T S-----

PROGRAM	1 PERSON	2 PERSON	3 PERSON	4 PERSON	5 PERSON	6 PERSON	7 PERSON	8 PERSON
Bakersfield, CA MSA								
FY 2009 MFI: 52200								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
Chico, CA MSA								
FY 2009 MFI: 55700								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
El Centro, CA MSA								
FY 2009 MFI: 45100								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
Fresno, CA MSA								
FY 2009 MFI: 53100								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
Hanford-Corcoran, CA MSA								
FY 2009 MFI: 51700								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
Los Angeles-Long Beach-Santa Ana, CA MSA								
Los Angeles-Long Beach, CA HMFA								
FY 2009 MFI: 62100								
30% OF MEDIAN	16650	19050	21400	23800	25700	27600	29500	31400
VERY LOW INCOME	27750	31700	35700	39650	42800	46000	49150	52350
LOW-INCOME	44400	50750	57100	63450	68550	73600	78700	83750
Orange County, CA HMFA								
FY 2009 MFI: 86100								
30% OF MEDIAN	19550	22300	25100	27900	30150	32350	34600	36850
VERY LOW INCOME	32550	37200	41850	46500	50200	53950	57650	61400
LOW-INCOME	52100	59500	66950	74400	80350	86300	92250	98200
Madera, CA MSA								
FY 2009 MFI: 52600								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
Merced, CA MSA								
FY 2009 MFI: 50400								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
Modesto, CA MSA								
FY 2009 MFI: 59600								
30% OF MEDIAN	12550	14300	16100	17900	19350	20750	22200	23650
VERY LOW INCOME	20850	23850	26800	29800	32200	34550	36950	39350
LOW-INCOME	33400	38150	42950	47700	51500	55350	59150	62950

STATE:CALIFORNIA

-----I N C O M E L I M I T S-----

PROGRAM	1 PERSON	2 PERSON	3 PERSON	4 PERSON	5 PERSON	6 PERSON	7 PERSON	8 PERSON
San Jose-Sunnyvale-Santa Clara, CA MSA								
San Benito County, CA HMFA								
FY 2009 MFI: 80400								
30% OF MEDIAN	16850	19300	21700	24100	26050	27950	29900	31800
VERY LOW INCOME	28150	32150	36200	40200	43400	46650	49850	53050
LOW-INCOME	44800	51200	57600	64000	69100	74250	79350	84500
San Jose-Sunnyvale-Santa Clara, CA HMFA								
FY 2009 MFI: 102500								
30% OF MEDIAN	22300	25500	28650	31850	34400	36950	39500	42050
VERY LOW INCOME	37150	42450	47750	53050	57300	61550	65800	70050
LOW-INCOME	59400	67900	76400	84900	91650	98450	105250	112050
San Luis Obispo-Paso Robles, CA MSA								
FY 2009 MFI: 70800								
30% OF MEDIAN	14900	17000	19150	21250	22950	24650	26350	28050
VERY LOW INCOME	24800	28300	31850	35400	38250	41050	43900	46750
LOW-INCOME	39650	45300	51000	56650	61200	65700	70250	74800
Santa Barbara-Santa Maria-Goleta, CA MSA								
FY 2009 MFI: 70400								
30% OF MEDIAN	16350	18700	21000	23350	25200	27100	28950	30800
VERY LOW INCOME	27250	31100	35000	38900	42000	45100	48250	51350
LOW-INCOME	43600	49800	56050	62250	67250	72200	77200	82150
Santa Cruz-Watsonville, CA MSA								
FY 2009 MFI: 83800								
30% OF MEDIAN	19450	22250	25000	27800	30000	32250	34450	36700
VERY LOW INCOME	32450	37100	41700	46350	50050	53750	57450	61200
LOW-INCOME	51900	59300	66750	74150	80100	86000	91950	97900
Santa Rosa-Petaluma, CA MSA								
FY 2009 MFI: 80200								
30% OF MEDIAN	16850	19250	21650	24050	25950	27900	29800	31750
VERY LOW INCOME	28050	32100	36100	40100	43300	46500	49700	52950
LOW-INCOME	44800	51200	57600	64000	69100	74250	79350	84500
Stockton, CA MSA								
FY 2009 MFI: 63600								
30% OF MEDIAN	13350	15300	17200	19100	20650	22150	23700	25200
VERY LOW INCOME	22250	25450	28600	31800	34350	36900	39450	42000
LOW-INCOME	35650	40700	45800	50900	54950	59050	63100	67200
Vallejo-Fairfield, CA MSA								
FY 2009 MFI: 79400								
30% OF MEDIAN	16650	19050	21400	23800	25700	27600	29500	31400
VERY LOW INCOME	27800	31750	35750	39700	42900	46050	49250	52400
LOW-INCOME	44450	50800	57150	63500	68600	73650	78750	83800
Visalia-Porterville, CA MSA								
FY 2009 MFI: 47200								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950
Yuba City, CA MSA								
FY 2009 MFI: 55400								
30% OF MEDIAN	11750	13400	15100	16750	18100	19450	20750	22100
VERY LOW INCOME	19550	22300	25100	27900	30150	32350	34600	36850
LOW-INCOME	31250	35700	40200	44650	48200	51800	55350	58950