

Program Overview & Eligibility

Completed by:

Case Id:

Name:

Address:

Program Overview & Eligibility

Please review the enclosed program information.



City of San Bernardino
HOME Owner Occupied
Rehab Program(OORP)

City of San Bernardino
909-384-5399
housing@sbcity.org

HOME (OORP): The objectives and intent of the HOME Program are to provide decent affordable housing to lower-income households; strengthen the ability of state and local governments to provide housing; expand the capacity of non-profit housing providers; and leverage private sector participation. The City of San Bernardino (City) is a HOME Participating Jurisdiction (PJ) and receives an annual formula allocation of HOME Program funds. Information regarding the use of HOME funds within the City may be found in the City's Five-Year Consolidated Plan or One Year Action Plan.

- HOME's flexibility empowers people and communities to design and implement strategies tailored to their own needs and priorities.
- HOME's emphasis on consolidated planning expands and strengthens partnerships among all levels of government and the private sector in the development of affordable housing.
- HOME's technical assistance activities and set-aside for qualified community-based nonprofit housing groups builds the capacity of these partners.
- HOME's requirement that Participating Jurisdictions (PJs) match 25 cents of every dollar in program funds mobilizes community resources in support of affordable housing.

The OORP Program provides assistance for improvements such as:

- Structural Issues (Foundation)
- Plumbing
- Electrical
- Roofing
- Heating/Cooling
- Landscaping
- Driveway repair/replacement
- Interior/exterior painting
- Bedroom/Bathroom additions to Relieve Overcrowding
- ADA Improvements
- Energy Efficiency Upgrades

The provisions of these guidelines will apply to the construction, alteration, demolition, repair and use of any building or structure within the scope of the program. It is not intended that every existing building within the scope of the program conforms, or be made to conform, to new construction requirements. Reasonable judgment must be exercised by the program participant in the rehabilitation of these buildings and application of building code standards relative to existing structures. Building permits shall be issued by the local jurisdiction having authority. The City may revise this manual from time to time and will give notice of significant program changes. Compliance with Federal Regulations and Applicable Laws Applicants must comply with all federal regulations, including the HOME regulations and other related laws and regulations. The City of San Bernardino intends to preserve housing units in full compliance with the following statutory and regulatory requirements:

- San Bernardino Municipal Code (adopted California Building Standards Code based on California Code of Regulations, Title 24)
- Most current Edition of the Uniform Building Code as published by the International Conference of Building Officials
- Most current Edition of the Uniform Mechanical Code as published by the International Conference of Building Officials
- Most current Edition of the Uniform Plumbing Code as published by the International Conference of Building Officials
- Most current Edition of the National Electrical Code as published by the National Fire Protection Agency.
- Most current State Title 24 Energy Standards
- Accessibility (24 CFR 92.251(b)(1)(iv))
- Disaster Mitigation (24 CFR 92.251(b)(1)(vi))
- The Lead-Based Paint Poisoning Prevention Act and Lead Safe Housing Rule (42 CFR Part 92 (92.355))
- Federal Housing Code: Housing Quality Standards;
- HOME Program Regulations: All rehabilitation that is performed using HOME funds must meet the requirements of 24 CFR 92.251 (b)(1)(i).

When manufacturers do not specifically cover any subject relating to installation of materials, fixtures, appliances, and/or apparatus, then the prevailing building code standards will apply. When there are no specifics to the application or installation, then reasonable, recognizable, and acceptable UL, IAMPO, ICBO or ASTM standards for installation will prevail.

In addition to these codes and standards, rehabilitation will include conformity with the Housing and Urban Development Housing Quality Standards and all applicable State Housing Laws. The regulations prohibit the use of lead-based paint in residential structures constructed or rehabilitated with federal assistance and require notification to homeowners, purchasers and tenants of such housing, of the hazards of lead-based paint and of the symptoms and treatment of lead-based paint poisoning.

A. Agency Information

Completed by:

Name:

Address:

A. Agency Information

Please provide the following information.

A.1. Organization Name

A.2. Address

A.3. Type of Organization

A.4. Project Title

A.5. Please select the primary applicant corporate status and complete the applicable section(s) below.

A.6. UEI Number

A.7. Are you submitting more than one (1) application to the Community Development Department for this funding cycle?

PRIMARY CONTACT INFORMATION

A.8. First Name

A.9. Last Name

A.10. Mailing Address

A.11. Contact Phone number

A.12. Email

CONSULTANT INFORMATION

A.13. Consultant Name

A.14. Mailing Address

A.15. Phone

A.16. Email

A.17. Does the applicant and/or the co-applicant have federal, state, and/or local debt, including any delinquent debt?

A.18. Does the applicant and/or the co-applicant have any unresolved federal, state and/or local audit or monitoring findings?

A.19. Is the applicant and/or the co-applicant delinquent on the filing of any federal or state tax returns?

POLICY INFORMATION

On November 15, 2021, President Biden signed into law the Infrastructure Investment and Jobs Act (IIJA), which includes the “Build America, Buy America Act” (the Act). This Act ensures that Federal infrastructure programs require the use of materials produced in the United States, increases the requirement for American-made content, and strengthens the waiver process associated with Buy American provisions.

A.20. Does your agency have a Build America Buy America (BABA) internal policy?

A.21. Would your agency be willing to implement a BABA policy if required?

The Section 3 program requires recipients of HUD funding to direct employment, training, and contracting opportunities to low-income individuals and the businesses that employ these persons within their community. Section 3 is a provision of the HUD Act of 1968 and is found at 12 U.S.C. 1701u. The regulations are found at 24 CFR Part 75.

Per this statutory language, recipients of HUD funds (i.e. grantees and contractors) ensure that “to the greatest extent feasible,” when certain HUD funds are used to assist housing and community development projects, preference for construction-related training, jobs, and contracting opportunities go to low- and very-low income people and to businesses that are owned by low- and very-low income persons or businesses that hire them. These opportunities are both gender and race neutral.

A.22. Does your agency have a section 3 policy in place?

*****If yes, policy enclosure/
attachment required*****

A.23. Would your agency be willing to implement a section 3 policy if required?

Many HUD programs require housing providers, housing developers, and contractors to comply with federal labor provisions. This includes paying federal prevailing wage rates on covered projects. HUD's Office of Davis-Bacon and Labor Standards (DBLS) is responsible for the administration and enforcement of federal labor standards and maintenance wage rate requirements in HUD programs. DBLS works with contractors, housing and community development industry groups, governmental agencies at the local, state, and tribal level, and organized labor groups to administer and enforce these federal labor provisions.

A.24. Does your agency have a Davis Bacon policy in place?

A.25. Would your agency be willing to implement a Davis Bacon policy if required?

The URA establishes the minimum Federal requirements for the acquisition of real property for Federally-funded programs and projects, and for the relocation of persons who must move from their homes, businesses, or farms as a direct result of acquisition, rehabilitation, or demolition for a Federally-funded program or project. 49 CFR Part 24 - Uniform Relocation Assistance and Real Property Acquisition for Federal and Federally-Assisted Programs

A.26. Does your agency have a URA Policy?

A.27. Would your agency be willing to implement a URA policy if required?

B. Project Information

Completed by:

Name:

Address:

B. Project Information

Please provide the following information.

Project Goals

How many residences/Homes do you anticipate to rehabilitate within the program year? How will you ensure these goals coincide with The City's needs? What previous experiences demonstrate this ability?

If any consultants are to be used in implementing the proposed project, describe the consultant service below and explain why this is needed.

Job descriptions of all staff to be paid under this project should be included as an attachment

C. Organizational Capacity

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Name:

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C. Organizational Capacity

Please provide the following information.

BOARD ENGAGEMENT

C.1. Board Meeting Schedule:

C.2. Is Board Approval Required for Annual Budget?

C.3. Will Board Review of Income/Expense Statements?

If yes, please state how often:

INDICATE BELOW IF THE ORGANIZATION HAS IN PLACE THE ITEMS LISTED.

C.4. An adopted Code of Ethics applicable to staff, Board and volunteers

C.5. An adopted Conflict of Interest Policy applicable to staff, Board and volunteers

C.6. Procedures to protect client confidentiality for staff and volunteers

C.7. Selection standards and training process for volunteers

C.8. Procedure/document information clients of their rights and responsibilities

C.9. An adopted grievance policy provided to clients at admission

C.10. For items not currently in place, or partially in place, explain in the space below the listing why these are not in place.

Non-Discrimination and Employment Opportunities

C.11. Do you notify the public that you do not discriminate based on race, color, religion, gender, sexual orientation, national origin, age or disabilities in hiring practices (for agencies with 15+ employees) or provision

of services (all organizations)?

C.12. If new jobs are created by the requested funding, will you be willing to adopt a hiring policy giving preference to low and/or moderate-income residents of the City of San Bernardino?

D. Management Systems

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Name:

Address:

D. Management Systems

Please provide the following information.

D.1. Does your organization/entity have experience managing grant funds, loans or other types of financial assistance?

| Financial Assistance Type | Y/N |
|---------------------------|-----|
| | |

D.2. Has your organization/entity had changes to key staff or positions in the past twelve (12) months?

| Position | Time Vacant |
|----------|-------------|
| | |

D.3. Has your organization/entity had changes to business systems in the past twelve (12) months?

| Business System Type | |
|----------------------|--|
| | |

D.4. Does your organization/entity have policies and procedures for the following?

**Financial Management Policies and Procedures include those specific to recording financial transactions, an accounting manual with chart of accounts, segregation of duties and authority for approving financial transactions, and maintenance of accounting records including secure access.*

D.5. Audit Reports and Findings: Did your organization/entity expend \$750,000 or more in federal grant funds in the past twenty-four (24) months?

D.6. Does your organization/entity anticipate expending \$750,000 or more in federal grant funds in the next twelve (12) months?

D.7. Has your organization/entity had an audit in the last twenty-four (24) months?

If yes, what type of audit?

List any audit findings received from an external entity within the last twenty-four (24) months. [Click here to enter text.](#)

D.8. Did your organization/entity have any monitoring visits by funders other than the city in the last twenty-four (24) months?

FINANCIAL STABILITY

D.9. Which of the following best describes your organization's/entity's accounting system?

D.10. Does your organization/entity have an accounting system in place to segregate expenditures by funding source?

If yes, what type of system?

D.11. Does the accounting system produce a budget vs. expenditures report?

D.12. Does your organization/entity maintain central files for grants, loans or other types of financial assistance?

D.13. Performance History: Has your organization/entity been awarded other grants, loans or other types of financial assistance in the past twelve (12) months?

If yes to any of the items above, please attach additional information.

E. Budget

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Name:

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E. Budget

Please provide the following information.

E.1. Current Projects with not only HUD funding, but all federal funds: List all currently funded projects using HUD grant funds, indicate originally scheduled completion dates. If delayed, explain delays and provide estimated new completion dates.

E.2. Projects Funding History: Detail all past monitoring findings or issues with previous funders, including HUD and other government agencies that have occurred within the past three years. Please be specific, including dates, organization's name and contact information, how issue was resolved, and current status of matter.

E.3. Debarred or Suspended: Has the agency been debarred, suspended, proposed for debarment, or declared ineligible for the award of contract by any Federal agency? If yes, provide a detailed information including dates

E.4. Please describe your organization's financial capacity as it relates to administering the proposed project in relation to current activities provided by the organization. Please provide the background and financial management experience of key leadership staff and their roles and responsibilities in relation to the implementation of the proposed project. Please describe the percentage and capacity that the organization's administrative staff will be dedicated to this project. Please provide the percentage of the organization's overall budget that is grant funded. Please describe any leverage funds that have been secured and/or are anticipated to be awarded by July 1, 2021 to support the proposed project.

E.5. Proposed Budget:

F. Documents

Completed by

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Address:

F. Documents

Please provide the following information.

If development application also upload:

- 990 Form (most recent two (2) years)
- Neighborhood Vicinity Map (illustrating property site within neighborhood)
- Google Map of each desirable site within 1/2 mile of project (Driving/Walking)
- Job Location Map - [On The Map](#)
- [QCT Map](#)
- [Policy Map](#) (Identify Qualified Opportunity Zones)
- Phase I Environmental
- Market Study
- If individual, Personal Financial Statement
- If individual, Tax Returns (1040) and Schedules for two (2) years
- If corporation or partnership, federal Tax Returns and Schedules for two (2) years

Documentation

EVALUATION RUBRIC

| A. | Agency Information | Maximum Points Possible |
|----|---|--------------------------------|
| 1 | Does the applicant have delinquent debt or audit findings? Do they provide all required documents for audit or monitoring findings? | 10 |
| 2 | requirements? Do policies already in place reflect compliance? | 15 |
| B. | Project Description | |
| 3 | Consolidated Plan – Does the applicant demonstrate how the proposal meets with the priorities outlined in the City of San Bernardino's 2020-2025 Consolidated Plan? Does the proposed project meet eligible HOME requirements per 24 CFR 92.206? | 10 |
| 4 | Project Goals/Objectives/Activities - Does the applicant provide a complete description of goals/objectives and their implementation? | 15 |
| C. | Organizational Capacity | |
| 5 | Agency/Program Experience – Does the applicant describe in detail the agency/program experience in developing, implementing and evaluating the proposed project or comparable projects? | 5 |
| 6 | Government Contracts - Does the applicant have any experience with government contracts for similar projects? Have there been any corrective actions and were they resolved? | 10 |
| 7 | Position Descriptions - Does the applicant provide a position description for all the proposed staffing of the project? Does the position description reflect the proposed project? Does the applicant provide a resume for the Executive Director/Chief Executive Officer? Does the resume demonstrate capacity/experience to support the | 10 |
| 8 | Organizational/Staffing - Did the applicant include an organizational/staffing chart? Does the chart illustrate organizational management, authority, and responsibility? Does the chart identify program staff (including title and FTE) and demonstrate the lines of accountability and reporting responsibility for the proposed project? | 5 |
| D. | Fiscal Capacity | |
| 9 | Match - Does the applicant provide evidence of funding Match? | 5 |
| 10 | Audited Financials - Does the applicant provide last two (2) fiscal years' audited financial statements of the entire organization with the applicable notes, Independent Auditor's Report on Compliance and Internal Control over Financial Reporting based on an audit of the financial statements in accordance with Government Accounting Standards and Independent Auditor's Statement of Findings and Questioned Costs? | 15 |

Submit

Completed by

Name:

Address:

Submit

Once an application is submitted, it can only be "Re-opened" by an Administrator.

I hereby certify that the information contained in this application is true and accurate to the best of my knowledge.

Signature

