



Oakland Housing Authority

Board of Commissioners

ANNE GRIFFITH, CHAIR
GREGORY D HARTWIG, VICE CHAIR
JANNY CASTILLO
LYNETTE JUNG-LEE
BARBARA MONTGOMERY
MARK J TORTORICH
WILLIAM J MAYES

Executive Director

Patricia Wells

In accordance with Article III, Section 1 and 2, of the Oakland Housing Authority Bylaws, NOTICE IS HEREBY GIVEN that the **Regular Meeting** of the Board of Commissioners has been called. The meeting will be held as follows:

**HOUSING AUTHORITY
OF THE CITY OF OAKLAND, CALIFORNIA**

Regular Meeting

Monday, October 23, 2023 at 6:00 PM



Oakland Housing
Authority

AGENDA
Regular Meeting
October 23, 2023, 6:00 PM

Zoom Information

To participate via teleconference, please use the zoom link below.

Join Zoom Meeting Online:

<https://oakha-org.zoom.us/j/82349243500?pwd=dk9ZU0s4NDczUVV6YkFuVVlydjJlVUT09>

Meeting ID (access code): 823 4924 3500

Meeting Password: 583884

Closed Caption – provided through the link.

To participate by Telephone:

Meeting ID (access code): 823 4924 3500

Meeting Password: 583884

1. Pledge of Allegiance

2. Roll Call

(AB 2449 Compliance) The Chair/Clerk of the Board will confirm that there are 4 Commissioners in the same, properly noticed meeting room within the jurisdiction of the City of Oakland, accessible to the public. Each Commissioner who is accessing the meeting remotely must disclose verbally whether they are requesting to meet remotely under AB2449 due to: (1) just cause (notice required), or (2) emergency circumstances. For “emergency circumstances” the request must be approved by a majority vote of the Board of Commissioners for the emergency circumstance to be used as a justification to participate remotely. All Commissioners meeting remotely must provide a general description of the circumstances relating to need to appear remotely at the given meeting. A Commissioner must also publicly disclose at the meeting, prior to any action, whether any other individuals 18 years or older are present in the room with the member at the remote location, and the general nature of the member’s relationship with such individuals.

3. Approval of Minutes

3.1 2023-939 Approval of the Board of Commissioners September 25, 2023 Regular Meeting

Attachment(s)

[Draft Minutes - September 25 2023 Regular Board Meeting](#)

4. Recognition of people wishing to address the Commission

If you need special assistance to participate in the meetings of the Oakland Housing Authority Board of Commissioners, please contact (510) 874-1510 (TDD: 800-618-4781). Notification 48 hours prior to the meeting will enable the Oakland Housing Authority Board of Commissioners to make reasonable arrangements to ensure accessibility.

All public comment on action items will be taken at the public comment portion of the meeting. You may comment via zoom by “raising your hand” or by submitting an e-mail to publiccomments@oakha.org or call using the zoom participant number.

- *You may request to make a public comment by “raising your hand” through Zoom’s video conference or phone feature, as described below. Requests will be received only during the designated times in which to receive such requests and only for eligible Agenda items. Public comments will be subject to the appropriate time limit of three (3) minutes.*
- *To comment by Zoom video conference, click the “Raise Your Hand” button to request to speak when Public Comment is being taken on the eligible Agenda item. You will then be unmuted, during your turn, and allowed to make public comments. After the allotted time of three (3) minutes, you will then be re-muted. Instructions on how to “Raise Your Hand” is available at: <https://support.zoom.us/hc/en-us/articles/205566129> - Raise-Hand-In-Webinar.*
- *To comment by phone, please call on one of the phone numbers listed below. You will be prompted to “Raise Your Hand” by pressing “*9” to request to speak when Public Comment is being taken on the eligible Agenda Item. You will then be unmuted, during your turn, and allowed to make public comments. After the allotted time of three (3) minutes, you will then be re-muted. Please unmute yourself by pressing *6. Instructions of how to raise your hand by phone are available at: <https://support.zoom.us/hc/en-us/articles/201362663> - Joining-a-meeting-by-phone.*

5. Old or Unfinished Business

6. Modifications to the Agenda

(Allows for any change in the order of business or the announcement of the postponement or continuation of agenda items.) The Board can only take action on items listed on this agenda unless a finding is made that an emergency exists.

7. New Business

7.1 **2023-938** Executive Director Acknowledgement.

7.2 **2023-918** Adopt a resolution authorizing the Executive Director to execute a contract with American Global Security to provide Unarmed Security Services at multiple Oakland Housing Authority administrative offices in an amount not to exceed \$1,667,250, with a 5-year term.

Attachment(s)

[23-022 CCGS Review Memo.docx.pdf](#)

[Resolution Unarmed Security Guards.docx](#)

7.3 **2023-920** Adopt a resolution authorizing the Executive Director to amend (i) the Commercial Bridge Loan Agreement (Mandela Gateway) entered into between the Housing Authority of the City of Oakland and Mandela Gateway Commercial, LLC dated December 1, 2020, and (ii) the

Mandela Gateway Commercial Bridge Loan Promissory Note (Mandela Gateway) in the amount of \$810,000 provided by the Housing Authority of the City of Oakland to Mandela Gateway Commercial, LLC, dated December 1, 2020, to extend the original three year loan term in both documents for an additional three years (total six years), from December 1, 2023 to a new maturity date of December 1, 2026; CEQA exempt.

Attachment(s)

[Resolution 4941.pdf](#)

[Resolution - Mandela Gateway Commercial Loan](#)

- 7.4 **2023-928** Adopt a resolution authorizing the Executive Director to approve a conditional commitment for a Development Loan of MTW funds in an amount not to exceed \$9,850,000 and a Rental Assistance Subsidy (RAS) of MTW funds in an amount not to exceed \$3,615,000, subject to clearance under the National Environmental Policy Act (NEPA), and authorizing the negotiation and execution of documents related to the provision of the loan and RAS for the development of East 12th Street – Lakehouse by East 12th Street Housing, L.P., an affiliate of East Bay Asian Local Development Corporation, in partnership with Jordan Real Estate Investments.

Attachment(s)

[PPT Presentation - BoC - Lakehouse 10-23-23](#)

[Reso - BoC East 12th Street Lakehouse EBALDC](#)

- 7.5 **2023-929** Adopt a resolution authorizing the Executive Director to purchase a Low-Income Housing Tax Credit Recapture Guarantee Surety Bond for an amount not to exceed \$120,000 and Pay Berkadia Fees for the Lion Creek Crossings Phase IV Limited Partner Buyout in an amount not to exceed \$30,000.

Attachment(s)

[Reso 5147 LCC Phase IV LP Buyout 02.27.23](#)

[Resolution LCC IV Recapture Bond](#)

- 7.6 **2023-930** Adopt a resolution authorizing the Executive Director to execute and submit a Rental Assistance Demonstration Application to the U.S. Department of Housing and Urban Development, including a Certification and Board Approval for the conversion of the Public Housing units in Lion Creek Crossings Phase I and II (AMP CA003000119) to RAD Project-Based Vouchers and Section 18 Tenant Protection Vouchers.

Attachment(s)

[RAD Board Presentation](#)

[Resolution LCC I II RAD Application](#)

- 7.7 **2023-919** Informational presentation on the Fiscal Year 2023 Moving to Work Annual Report.

Attachment(s)

[CA003 FY 2023 MTW Annual Report-Final.pdf](#)
[Presentation - MTW Annual Report 2023.pdf](#)

- 7.8 **2023-940** Creation of Executive Director Evaluation Ad Hoc Committee, and Assignment of Commissioners to Executive Director Evaluation Ad Hoc Committee by Chairperson pursuant to Oakland Housing Authority Bylaws and Commission Rules & Procedures.

8. Consent Agenda

Items on the Consent Agenda are considered routine and do not require separate discussion. If a Commissioner wishes to have discussion, or if a member of the public wishes to comment on any consent item, the item may be removed from the consent agenda and considered separately. Questions or clarifications may be considered by the Commission without removal from the Consent Agenda. The Consent Agenda is adopted in one motion.

- 8.1 **2023-894** Adopt a resolution authorizing the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 004 Loc 1021 SEIU MAINT Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

Attachment(s)

[Reso 004 LOC 1021 SEIU MAINT UNIT.2024](#)

- 8.2 **2023-902** Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 001 Unrepresented Group, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

Attachment(s)

[Reso_001_UNREPRESENTED.2024 \(4\)](#)

- 8.3 **2023-903** Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 002 Alameda Co Bldg Construct Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

Attachment(s)

[Reso 002 ALAMEDA CO BLDG CONSTRUCT](#)

- 8.4 **2023-905** Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 005 Loc 1021 SEIU APA/HAR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

Attachment(s)

[Reso 005 LOC 1021 SEIU APA](#)

- 8.5 **2023-906** Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 006 Loc 29 OPEIU Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

Attachment(s)

[Reso 006 LOC 29 OPEIU.2024](#)

- 8.6 [2023-907](#) Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 701 Unrepresented ICMA RETR Group, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

Attachment(s)

[Reso 701 UNREPRESENTED ICMA RETR.2024](#)

- 8.7 [2023-908](#) Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 702 Alameda Co Bldg. ICMA RETR, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

Attachment(s)

[Reso 702 ALAMEDA CO BLDG ICMA RETR.2024](#)

- 8.8 [2023-909](#) Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 706 Loc 29 OPEIU ICMA RETR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

Attachment(s)

[Reso 706 LOC 29 OPEIU ICMA RETR.2024](#)

- 8.9 [2023-923](#) Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 704 Loc 1021 SEIU ICMA RETR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

Attachment(s)

[Reso 704 LOC 1021 MAINT ICMA RETR.2024](#)

- 8.10 [2023-934](#) Adopt a resolution authorizing the Executive Director to purchase commercial property insurance from the HAI Group for the period of November 11, 2023 to November 11, 2024, and to make payment of the annual premiums in the amount not to exceed \$350,000.

Attachment(s)

[Commercial Property Insurance Resolution](#)

9. Written Communications Departments' Monthly Report

- 9.1 2023-932 01 - Family & Community Partnerships

Attachment(s)

[01 - Family and Community Partnerships](#)

- 9.2 2023-935 02 - Leased Housing September Monthly Report

Attachment(s)

[02 - Leased Housing September Monthly Report](#)

9.3 2023-926 03 - Office of Property Operation

Attachment(s)

[03 - Office of Property Operations](#)

9.4 2023-924 04 - Capital Improvements

Attachment(s)

[04 - Capital Improvements](#)

9.5 2023-931 05 – Office of Real Estate Development

Attachment(s)

[05 - Office of Real Estate Development](#)

9.6 2023-917 06 - Asset Management

Attachment(s)

[06 - Asset Management](#)

10. Executive Director's report regarding matters of special interest to the Commission occurring since the last meeting of the Commission

10.1 2023-933 Executive Director's report regarding matters of special interest to the Commission occurring since the last meeting of the Commission.

Attachment(s)

[October ED Report](#)

11. Reports of Commission Committees

12. Announcements by Commissioners

13. Adjournment of Public Session

DocuSigned by:

Patricia Wells

722CF180EE194A1

Patricia Wells, Secretary / Executive Director



Oakland Housing
Authority

MINUTES OF THE SPECIAL MEETING
BOARD OF COMMISSIONERS
HOUSING AUTHORITY OF THE
CITY OF OAKLAND, CALIFORNIA

[Meetings are recorded and are accessible through our website: www.oakha.org]

Monday, September 25, 2023
Regular Meeting

The Oakland Housing Authority Board of Commissioners convened a Regular Meeting via Zoom software platform online and via teleconference, providing access to the public and enabling submission of public comment by zoom, phone and/or by email.

Secretary Wells called the meeting to order at 6:03 P.M.

1. **Pledge of Allegiance**
2. **Roll Call**

(AB 2449 Compliance) The Chair/Clerk of the Board will confirm that there are 4 Commissioners in the same, properly noticed meeting room within the jurisdiction of the City of Oakland, accessible to the public. Each Commissioner who is accessing the meeting remotely must disclose verbally whether they are requesting to meet remotely under AB2449 due to: (1) just cause (notice required), or (2) emergency circumstances. For "emergency circumstances" the request must be approved by a majority vote of the Board of Commissioners for the emergency circumstance to be used as a justification to participate remotely. All Commissioners meeting remotely must provide a general description of the circumstances relating to need to appear remotely at the given meeting. A Commissioner must also publicly disclose at the meeting, prior to any action, whether any other individuals 18 years or older are present in the room with the member at the remote location, and the general nature of the member's relationship with such individuals.

Present 7 - Anne Griffith, Chair, Gregory Hartwig, Vice Chair, Janny Castillo, Lynette Jung-Lee, Barbara Montgomery, Mark Tortorich, William Mayes

3. **Approval of Minutes**

- 3.1 Draft Minutes to be Approved from the August 28, 2023, Regular Board Meeting

Commissioner Mayes requested that the minutes be modified to spell his

name correctly. This was noted for the record.

Commissioner Hartwig moved to approve the minutes of the Regular Meeting of August 28, 2023, as amended, which was seconded by Commissioner Mayes. The motion passed by the following vote:

Ayes 7 – Griffith, Hartwig, Castillo, Jung-Lee, Mayes, Montgomery, and Tortorich

4. Recognition of people wishing to address the Commission

There were no persons wishing to address the Board.

5. Old or Unfinished Business

5.1 Informational Update on Vehicle Purchases Made under Resolution 5144

Chief Hopkins and Staff presented a summary of vehicle purchases including the Capital Outlay Budget for this item. Staff also presented an overview the current OHA fleet inventory.

The Commission initiated a discussion with staff regarding the use of the current vehicles and the benefit to staff productivity by increasing the fleet.

6. Modifications to the Agenda

(Allows for any change in the order of business or the announcement of the postponement or continuation of agenda items.) The Board can only take action on items listed on this agenda unless a finding is made that an emergency exists.

The Board Meeting paused at 6:16 pm to correct technological difficulties at and resumed at 6:19pm

7. New Business

7.1 Summary of the OAHPI Master Planning Process to Date

Chief Officer of Real Estate Development Thomas Deloye, Chief Housing Operations Officer Michelle Hasan, and Sandi Stroud of Urban Focus LLC presented the Draft Presentation of the OAHPI Master Plan that will be shared with stakeholders including staff, residents, elected and community stakeholders.

Staff presented to the Board the details and purpose of the OAHPI Master Plan, the strategic goals and development timeline, and the impact of the OAHPI Master Plan as it relates to the OAHPI Rehabilitation Plan.

Executive Director Wells highlighted that anticipated future procurements will allow OHA to increase our contribution in addressing the city's need for more affordable housing.

The Commission and staff discussed the years of planning that resulted in this important milestone, and the future planning that will be required to realize the goals. It was recommended that an expert be consulted to evaluate how today's market and funding will impact the project development.

The Commission and staff discussed several enhancements to the plan, including terminology and data used in the draft presentation, providing suggestions that would best convey the true intentions.

There were no further questions from the Board of Commissioners.

- 7.2 Adopt a resolution authorizing the Executive Director to execute a five-year contract with Yardi Systems, Inc. for software licenses to their cloud property management system in an amount not to exceed \$2,550,000.

Director of IT Brandon White and Assistant Director of IT Rose Marie Griffin presented current YARDI PHA Solutions systems that are being used by OHA and future software needs that YARDI will support. General Counsel Jhaila Brown added that this presentation is to amplify the impact of YARDI on OHA operations, and that the YARDI contract was previously approved.

The Commission initiated conversation with staff on software and cybersecurity on mobile devices.

Having no further questions from the Board, Commissioner Hartwig motioned to approve Item 7.2., which was seconded by Commissioner Castillo. The item passed unanimously by the following vote:

Ayes 7 – Griffith, Hartwig, Castillo, Jung-Lee, Montgomery, Tortorich, and Mayes

- 7.3 Adopt a resolution authorizing the Executive Director to execute a two-year contract with Amplify Consulting Partners Inc. for consulting services in the amount not to exceed \$1,300,000.

Director of IT Brandon White and Assistant Director of IT Rose Marie Griffin presented details on the contract with Amplify Consulting Partners Inc, who assists with project management for OHA for IT and other software implementation.

Assistant Director Griffin providing information regarding the launch of the intranet and its capabilities.

Having no further questions from the Board, Commissioner Hartwig motioned to approve Item 7.3., which was seconded by Commissioner

Tortorich. The item passed unanimously by the following vote:

Ayes 7 – Griffith, Hartwig, Castillo, Jung-Lee, Montgomery, Tortorich, and Mayes

8. Consent Agenda

Items on the Consent Agenda are considered routine and do not require separate discussion. If a Commissioner wishes to have discussion, or if a member of the public wishes to comment on any consent item, the item may be removed from the consent agenda and considered separately. Questions or clarifications may be considered by the Commission without removal from the Consent Agenda. The Consent Agenda is adopted in one motion.

8.1 Adopt a resolution authorizing Executive Director to write off \$14,084 in Tenant Account Receivables for public housing tenants vacated third party-managed properties during the period of time between January 1, 2023. and June 30, 2023

8.2 Adopt a resolution authorizing the Executive Director to write off Tenant Account Receivables for vacated tenants incurred by the OHA- managed public housing portfolio and deemed to be uncollectible for the period of March 1, 2022 – August 31, 2023, in an amount not to exceed \$96,669.78

Having no further questions from the Board, Commissioner Tortorich motioned to approve Item 8.1 and Item 8.2, which was seconded by Commissioner Mayes. The item passed unanimously by the following vote:

Ayes 7 – Griffith, Hartwig, Castillo, Jung-Lee, Montgomery, Tortorich, and Mayes

9. Written Communications Departments' Monthly Report

9.1 Written Communication Departments' Monthly Report

There were no further questions from the Board of Commissioners

10. Executive Director's report regarding matters of special interest to the Commission occurring since the last meeting of the Commission

Secretary Wells briefed the Commission on the following matters:

- The OHA Owner's Appreciation Day
- ACORN Woodland/EnCompass Academy Elementary Campus/Oakland Undivided connectivity event

- Jobs Plus East Oakland Works Program at Lockwood Garden
- 16 National Night Out
- Holiday Splendor

11. Reports of Commission Committees

There were no reports of Commission Committees

12. Announcements by Commissioners

- Commissioner Castillo announced Healthy Living Festival at Oakland Zoo
- Commissioner Mayes announced the RAB Halloween Program for over 10 site and 600 kids.

13. Adjournment of Public Session, to Closed Session

The Commission recessed to closed session at 8:17 pm.

14. Closed Session

Closed session concluded at 9:46pm with no items to report out. Public Session reconvened.

15. Adjournment

Having no further questions from the Board, Commissioner Hartwig motioned to Adjourn, which was seconded by Commissioner Tortorich. The item passed unanimously by the following vote:

Ayes 7 – Griffith, Hartwig, Castillo, Jung-Lee, Montgomery, Tortorich, and Mayes

The meeting adjourned at 9:46 pm.

Anne Griffith, Chair of Board of Commissioners

Patricia Wells, Secretary / Executive Director



Oakland Housing Authority

TO: Board of Commissioners
FROM: Patricia Wells, Executive Director ^{DS} PW
SUBJECT: Executive Director Acknowledgement.
DATE: October 23, 2023

Type: Informational

2023-938

FISCAL IMPACTS/CONSIDERATION

There is no fiscal impact for this item.

BACKGROUND

On October 8th, 2023 the Executive Director successfully completed her term as the National President for the National Association of Housing Redevelopment Officials (NAHRO). This nationally leadership term included several unique historic events and circumstances which OHA and the greater NAHRO community successfully navigated. The Executive Director wishes to acknowledge sincere appreciation for the Oakland Housing Authority's Board of Commissioners and Authority staff for their contributions in the support of the local, national and global efforts during the 2021-2023 Administration.



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

^{DS}
PW

SUBJECT: Adopt a resolution authorizing the Executive Director to execute a contract with American Global Security to provide Unarmed Security Services at multiple Oakland Housing Authority administrative offices in an amount not to exceed \$1,667,250, with a 5-year term.

DATE: October 23, 2023

Type: Action

2023-918

RECOMMENDATION

Authorizing the Executive Director to execute a contract with American Global Security to provide Unarmed Security Services at multiple City of Oakland Housing Authority administrative offices in an amount not to exceed \$1,667,250.

FISCAL IMPACTS/CONSIDERATION

The contract of \$333,450 per year funding is included in the fiscal year 2023/2024 budget, which was approved by the Board of Commissioners on June 26, 2023 and will be included in future budget requests.

BACKGROUND

For the purpose of maintaining a higher level of security at selected facilities, the City of Oakland Housing Authority issued a Request for Proposals for Unarmed Security Guards at multiple administrative offices. An evaluation committee consisting of City of Oakland Housing Authority staff recommended American Global Security receive the award. The contract has a maximum term of five (5) years.

The locations where the unarmed security guard will be assigned are: 1327 65th Ave, Oakland, CA 94621, 935 Union Street, Oakland, CA 94607, 1540 Webster Street, Oakland, CA 94608, and 1619 Harrison St, Oakland, CA 94612. Additional sites may be added on an as needed basis.

ANALYSIS

The Oakland Housing Authority issued RFP #23-022 for Unarmed Security Guard Services in

accordance with the Authority's Procurement Policy. A total of 942 vendors received notification of issuance of the RFP through the agency's bidding systems, Economic Engine and Infolane. Eleven (11) companies responded by the deadline of July 20, 2023.

An evaluation panel comprised of three City of Oakland Oakland Housing Authority employees convened September 1, 2023, to evaluate and rate the 11 responsive proposals. All panelist scores were averaged, resulting in one final score for each company. The panel recommended awarding a contract to the highest-ranked firm, American Global Security.

The Oakland Housing Authority's Contract and General Services Department (CCGS) confirmed submitted a responsive and responsible proposal, and confirmed American Global Security has not been debarred or limited from participating in federally funded projects.

ACTION REQUESTED

Staff recommends that the Board of Commissioners adopt a resolution authorizing the Executive Director to execute a contract with American Global Security to provide Unarmed Security Services at multiple City of Oakland Housing Authority administrative offices in an amount not to exceed \$1,667,250.00.

Attachments:

[23-022 CCGS Review Memo.docx.pdf](#)

[Resolution Unarmed Security Guards.docx](#)



CONTRACT COMPLIANCE & GENERAL SERVICES
1619 Harrison Street, Oakland CA 94612 * (510) 587-2166 / (510) 587-2124 FAX

INTEROFFICE MEMORANDUM

To: Patricia Wells, Executive Director

Through: Duane Hopkins, Chief Officer of Program and Finance Administration 
Alan Love, Chief of Police 
Loretta Lovell, Special Advisor of CCGS 
Courtney Sharif, Contract Specialist 

From: Jamie Walters, Contract Specialist, CCGS 

Subject: Requesting Approval of CCGS Review Memo and Draft Contract for RFP #23-022
Unarmed Security Guard Services

Date: September 25, 2023

This memo is to advise you that evaluations have been completed for RFP #23-022 Unarmed Security Guard Services. After all proposals were reviewed and scored, American Global Security is the highest-ranked firm and is being recommended for award.

Background

The Authority issued RFP #23-022 in accordance with the Authority’s Procurement Policy. A total of 942 vendors received notification of issuance of the RFP through the agency’s bidding systems, Economic Engine and Infolane. Eleven (11) companies responded by the deadline of July 20, 2023.

Evaluation

A panel comprised of three OHA Employees convened September 1, 2023, to evaluate and rate the 11 responsive proposals. All panelist scores were averaged, resulting in one final score for each company. The Evaluation Committee recommended awarding a contract to the highest-ranked firm, American Global Security.

Recommendation

It is recommended that the Authority proceeds with awarding to the highest-ranked company, American Global Security.

Debarment: The recommended company has not been debarred or limited from participating in federally funded projects.

Insurance Requirement: Copies of Commercial, General, Automobile, and Errors and Omissions Liability Insurance (naming the Oakland Housing Authority as additionally insured) along with Workers' Compensation Insurance shall be requested and received by CCGS for this project. The contracted firm shall be responsible for collecting and forwarding all insurance documents from its subcontractors to CCGS.

Approved:

Not Approved:

DocuSigned by:
Patricia Wells
722CF180EE194A1...

Patricia Wells
Executive Director

9/27/2023

Date

Patricia Wells
Executive Director

Date

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER:

AUTHORIZING THE EXECUTIVE DIRECTOR TO EXECUTE A CONTRACT WITH AMERICAN GLOBAL SECURITY FOR UNARMED SECURITY GUARD SERVICES AT THE CITY OF OAKLAND HOUSING AUTHORITY ADMINISTRATIVE OFFICES IN THE AMOUNT NOT TO EXCEED \$1,667,250 FOR A CONTRACT TERM MAXIMUM OF FIVE YEARS.

WHEREAS, the Authority seeks to provide our participants with the highest level of customer service, and its the safest work environment possible; and

WHEREAS, the Authority believes that unarmed security services will provide a higher level of security for staff and participants, improve customer service, as well as to provide a visual deterrent to those wishing to disrupt normal operations; and

WHEREAS, in order to enhance the security and well-being of participants and staff, the Authority wishes to provide unarmed security services at several of its office locations including the East District Office, West District Office, and Downtown Offices; and

WHEREAS, the most effective way to provide these services is through a contract with an experienced and reliable company; and

WHEREAS, the City of Oakland Housing Authority issued a Request for Proposals (RFP) No. 23-022 in accordance with the Authority's procurement policy for the contracting of unarmed security guards at Authority administrative office locations; and

WHEREAS, notification of issuance was sent to 942 vendors through the agency's bidding systems, Economic Engine and Infolane; and

WHEREAS, eleven bids were received by the deadline of July 20, 2023 and the most responsive and responsible proposal was received from American Global Security; and

WHEREAS, the total project cost shall not exceed \$1,667,250.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE CITY OF OAKLAND HOUSING AUTHORITY, CALIFORNIA:

THAT, the Board of Commissioners authorizes the Executive Director to execute a contract with American Global Security for unarmed Security services in the amount not to exceed \$1,667,250; and

THAT, the Executive Director is further authorized to renew the contract for the second and third year, for a cost not to exceed \$333,450 per year; and

THAT, the Executive Director, on behalf of the Authority, is hereby authorized to take all necessary actions to implement the foregoing resolution; and

THAT, this resolution shall take effect immediately.

I hereby certify that the foregoing resolution is a full, true and correct copy of a resolution passed by the Commissioners of the City of Oakland Housing Authority, California on October 23, 2023.

Executive Director

ADOPTED:

RESOLUTION NO.



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director DS
PW

SUBJECT: Adopt a resolution authorizing the Executive Director to amend (i) the Commercial Bridge Loan Agreement (Mandela Gateway) entered into between the Housing Authority of the City of Oakland and Mandela Gateway Commercial, LLC dated December 1, 2020, and (ii) the Mandela Gateway Commercial Bridge Loan Promissory Note (Mandela Gateway) in the amount of \$810,000 provided by the Housing Authority of the City of Oakland to Mandela Gateway Commercial, LLC, dated December 1, 2020, to extend the original three year loan term in both documents for an additional three years (total six years), from December 1, 2023 to a new maturity date of December 1, 2026; CEQA exempt.

DATE: October 23, 2023

Type: Action

2023-920

RECOMMENDATION

This action authorizes the Executive Director to amend (i) the Commercial Bridge Loan Agreement (Mandela Gateway) entered into between the Housing Authority of the City of Oakland and Mandela Gateway Commercial, LLC dated December 1, 2020, and (ii) the Mandela Gateway Commercial Bridge Loan Promissory Note (Mandela Gateway) in the amount of \$810,000 provided by the Housing Authority of the City of Oakland to Mandela Gateway Commercial, LLC, dated December 1, 2020, to extend the original three year loan term for an additional three years (total six years), with a new maturity date of December 1, 2026 under the same loan terms. The loan will continue to preserve Mandela Gateway Commercial's position financially and enhance BRIDGE Economic Development Corporation, it's general partner's interest in maintaining commercial space for the benefit of the tenants and community. The loan maturity date will be amended from December 1, 2023 to December 1, 2026; CEQA exempt.

FISCAL IMPACTS/CONSIDERATION

The term of the loan in the amount of \$810,000 will be extended by an additional three-years, for a total term of six-years, and shall accrue the same interest rate of one percent (1%) per annum. The loan shall be payable in full at the end of the term or if the rental housing or commercial improvements are refinanced. No funds are required as this action is just the extension of the existing loan term.

BACKGROUND

The Housing Authority of the City of Oakland (“Authority”) owns that certain real property located in the City of Oakland, identified as Assessor’s Parcel No. 004-0109-003, located at 1432 7th Street, Oakland, CA 94607 (“Property”).

The Authority and Mandela Gateway Commercial, LLC (MGC), a California limited liability company (“Borrower”) whose managing member is BRIDGE Economic Development Corporation (BRIDGE), a California nonprofit public benefit corporation, entered into that certain Ground Lease dated on or about February 1, 2003 (“Ground Lease”) wherein Authority leased the Property to Borrower for a period of 30 - years (“Leasehold”) and Borrower constructed thereon approximately 13,063 square feet of commercial space (retail and parking) (“Commercial Improvements”) on the Property. The Commercial Improvements are part of a mixed-use project known as Mandela Gateway, which includes a 168-unit affordable housing development.

The Commercial Improvements were placed in service in 2005 and lease-up of the retail space occurred in 2006. Borrower owns a fee interest in the Commercial Improvements for the term of the Ground Lease.

The Authority holds an option to purchase the Commercial Project twenty (20) years after the project received a certificate of occupancy which occurred on January 1, 2005. The Authority’s option period currently extends an additional two years from January 1, 2025, through January 1, 2027.

The Commercial Project was refinanced in 2015 for the purpose of making improvements to further support the leasing of the commercial space with a \$1,218,842 loan from Heritage Bank of Commerce (Commercial Loan). The Commercial Loan was structured to mature and require full repayment on December 13, 2020, which was the time the property was originally eligible for repositioning. The final loan payment at that time was estimated to be \$956,911. However, the lender had required \$150,000 cash collateral to be held during the term of Commercial Loan which was subsequently applied to the pay-off.

The larger of the two commercial spaces was originally occupied by the 99 Cent Only store and the smaller space was leased by the Self-Help Credit Union. The 99 Cent Only store closed at the end of their lease in January of 2017. BRIDGE has been working to secure a tenant to replace the 99 Cent Only store since that time but negotiations with two potential tenants have been unsuccessful. The Self-Help Credit Union is still occupying the smaller space, but the lease income generated by the credit union was not sufficient to refinance the existing commercial loan. Given the inability to lease the large space or refinance the Rental Project, BRIDGE requested the Authority’s assistance to pay off the Commercial Loan by December 13, 2020.

On October 8, 2020, under the Resolution Number 4941, Oakland Housing Authority Board of Commissioners authorized the Executive Director to execute a 36-month bridge loan for up to \$810,000 with MGC. The loan was used by MGC to pay, in full, the outstanding loan from Heritage Bank of Commerce.

Pursuant to the MGC Bridge Loan Promissory Note, the current loan maturity date is

December 1, 2023. However, due to challenges with the commercial market in the area, MGC has been operating in a deficit as income generated from the commercial space is not sufficient to cover operating expenses. The commercial space has only been 15.53% leased from 2020 to August 2022 and the property has experienced substantial negative cash flow over the past three years.

The commercial space is currently fully leased (as of August 2022). The incoming commercial tenant is currently in the process of completing tenant improvements that are scheduled to be finalized in December of 2023. With the addition of the new commercial lease MGC expects to have positive cash flow starting in December of 2023 and beyond. MGC continues to explore ways to improve operating cash flow, which will require partnership with OHA. MGC is requesting an extension to the original MGC loan term for an additional three years to mature on December 1, 2026, with the same interest rate and payment terms. This extension will allow MGC time to formulate a long-term strategy to improve the Project's financial position and develop prepayment options for MGC's existing loan from the Authority.

Authority staff propose to amend the loan with MGC. MGC will be required to make payments during the new term of the loan annually from surplus cash generated by the Commercial Project. If either the Rental Project or Commercial Project are refinanced MGC will be required pay the loan in full before distributing proceeds generated through a refinance transaction.

ACTION REQUESTED

It is recommended that the Board of Commissioners adopt a resolution authorizing the Executive Director to amend (i) the Commercial Bridge Loan Agreement (Mandela Gateway) entered into between the Housing Authority of the City of Oakland and Mandela Gateway Commercial, LLC dated December 1, 2020, and (ii) the Mandela Gateway Commercial Bridge Loan Promissory Note (Mandela Gateway) in the amount of \$810,000 provided by the Housing Authority of the City of Oakland to Mandela Gateway Commercial, LLC, dated December 1, 2020, to extend the original three year loan term for an additional three years (total six years), from December 1, 2023 to a new maturity date of December 1, 2026.

Attachments:

[Resolution 4941.pdf](#)

[Resolution - Mandela Gateway Commercial Loan](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner: Anne Griffith

Seconded by Commissioner: Barbara Montgomery

and approved by the following vote:

AYES: Griffith, Montgomery, Hartwig, Jung-Lee, Tortorich, Wright, Castillo

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER: 4941

**RESOLUTION AUTHORIZING THE EXECUTIVE DIRECTOR TO EXECUTE A LOAN
WITH MANDELA GATEWAY COMMERCIAL, LLC FOR UP TO \$810,000 TO BE
USED TO PAY OFF A LOAN FROM HERITAGE BANK OF COMMERCE**

WHEREAS, in the Mandela Gateway HOPE VI revitalization, 46 public housing units on a former public housing development site called Westwood Gardens were demolished; the Oakland Housing Authority (the "Authority") purchased a number of parcels adjacent to Westwood Gardens and assembled a development parcel large enough to build 168 new units (the "Rental Project") in 2002; and

WHEREAS, the Authority owns the Mandela Gateway land and leased it to Mandela Gateway Associates, L.P the owner and operator of the Rental Project; and

WHEREAS, the following entities serve as partners in Mandela Gateway Associates, L.P.: Investor Limited Partner: Alden Torch (99.98%); Managing General Partner: BRIDGE Housing Ventures, Inc. ("BRIDGE") (.009%); Special Limited Partners: Chestnut Linden, Inc. (.001%) and RCHP SLP III LP (.01%); and

WHEREAS, the Authority holds an option to purchase the Rental Project from Mandela Gateway Associates, L.P. until July 2021; and

WHEREAS, the original Investor Limited Partner sold their interest to an investor, Alden Torch; and

WHEREAS, until the Authority successfully acquires the Rental Project or the investors' interest in the Rental Project, the Project cannot be refinanced; and

WHEREAS, Mandela Gateway also includes 20,922 square feet of retail space, with 7,859 square feet owned by Mandela Gateway Associates and 13,063 square feet of retail and parking (the "Commercial Project"), made up of two commercial spaces – 11,112sf and 1,822sf, owned by Mandela Gateway Commercial LLC ("MGC"); and

WHEREAS, MGC was formed as a California limited liability company on December 11, 2002, to construct and operate the Commercial Project; and

WHEREAS, the Commercial Project was built on land owned by and leased from the Authority under the terms of a 30-year ground lease agreement dated February 1, 2003 (the "Commercial Ground Lease"); and

WHEREAS, the Authority holds an option to purchase the Commercial Project that extends from January 1, 2025 through January 1, 2027; and

WHEREAS, the Commercial Project was refinanced in 2015 for the purpose of making improvements to further support the leasing of the commercial space with a \$1,218,842 loan from Heritage Bank of Commerce (the "Commercial Loan"); and

WHEREAS, the Commercial Loan was designed to balloon at the time the property was eligible for repositioning and is payable in full on December 13, 2020; and

WHEREAS, the final loan payment is estimated to be \$956,911.89; and

WHEREAS, \$150,000 cash collateral held during the term of Commercial Loan will be applied to the pay-off; and

WHEREAS, the larger of the two commercial spaces had been occupied by the 99 Cent Only store and the smaller space is leased by the Self-Help Credit Union; and

WHEREAS, the 99 Cent Only store closed at the end of their lease on January 31, 2017 and the larger space has been vacant since that time; and

WHEREAS, the Self-Help Credit Union is still occupying the smaller space but the lease income generated by the credit union is not sufficient to refinance the existing commercial loan; and

WHEREAS, given the inability to lease the large space or refinance the Rental Project until after the investor exits the Partnership, BRIDGE requested the Authority's assistance to pay off the Commercial Loan by December 13, 2020.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA;

THAT, the Board hereby authorizes the Executive Director to execute a bridge loan for up to \$810,000 with Mandela Gateway Commercial, LLC; and

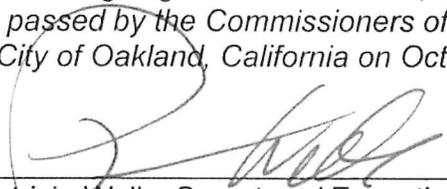
THAT, the proceeds of the loan are to be used by MGC to pay, in full, an outstanding loan from Heritage Bank of Commerce; and

THAT, the loan will have a term of 36 months with the potential for a six-month extension, early repayment requirements if the rental or commercial improvements are refinanced and requires BRIDGE to demonstrate good faith efforts to activate the vacant commercial space; and

THAT, the Authority will charge an interest rate not to exceed one percent; and

THAT, the Executive Director is authorized to take all steps necessary to implement this resolution.

I certify that the foregoing resolution is a full, true and correct copy of a resolution passed by the Commissioners of the Housing Authority of the City of Oakland, California on October 26, 2020.



Patricia Wells, Secretary / Executive Director

ADOPTED: October 26, 2020

RESOLUTION NO. 4941

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER:

AUTHORIZING THE EXECUTIVE DIRECTOR TO AMEND (I) THE COMMERCIAL BRIDGE LOAN AGREEMENT (MANDELA GATEWAY) ENTERED INTO BETWEEN THE HOUSING AUTHORITY OF THE CITY OF OAKLAND AND MANDELA GATEWAY COMMERCIAL, LLC DATED DECEMBER 1, 2020, AND (II) THE MANDELA GATEWAY COMMERCIAL BRIDGE LOAN PROMISSORY NOTE (MANDELA GATEWAY) IN THE AMOUNT OF \$810,000 PROVIDED BY THE HOUSING AUTHORITY OF THE CITY OF OAKLAND TO MANDELA GATEWAY COMMERCIAL, LLC, DATED DECEMBER 1, 2020, TO EXTEND THE ORIGINAL THREE YEAR LOAN TERM FOR AN ADDITIONAL THREE YEARS (TOTAL SIX YEARS), WITH A NEW MATURITY DATE OF DECEMBER 1, 2026;CEQA EXEMPT

WHEREAS, the Housing Authority of the City of Oakland (“Authority”) owns that certain real property located in the City of Oakland, identified as Assessor’s Parcel No. 004-0109-003, located at 1432 7th Street, Oakland, CA 94607 (“Property”); and

WHEREAS, the Authority and Mandela Gateway Commercial, LLC, a California limited liability company (“Borrower”) whose managing member is BRIDGE Economic Development Corporation, a California nonprofit public benefit corporation, entered into that certain Ground Lease dated on February 1, 2003 (“Ground Lease”) wherein Authority leased the Property to Borrower for a period of 30 years (“Leasehold”) and Borrower constructed thereon approximately 13,063 square feet of commercial space (retail and parking) (“Commercial Improvements”) on the Property. The Commercial Improvements are part of a mixed-use project known as Mandela Gateway, which includes a 168-unit affordable housing development; and

WHEREAS, The Commercial Improvements were placed in service in 2005 and lease-up of the retail space occurred in 2006. Borrower owns a fee interest in the Commercial Improvements for the term of the Ground Lease; and

WHEREAS, the Commercial Improvements were refinanced in 2015 for the purpose of making improvements to further support the leasing of the commercial space with a \$1,218,842 loan from Heritage Bank of Commerce (Commercial Loan); and

WHEREAS, on October 8, 2020, pursuant to Resolution Number 4941, the Authority Board of Commissioners authorized the Executive Director to provide a bridge loan to Borrower for up to \$810,000, to pay, in full, an outstanding loan from Heritage Bank of Commerce that was due on December 13, 2020 (“Authority Commercial Loan”); and

WHEREAS, the Authority Commercial Loan was memorialized in that certain Commercial BRIDGE Loan Agreement (Mandela Gateway) between Authority and Borrower, dated December 1, 2020 (“Authority Loan Agreement”), and evidenced by that certain Mandela Gateway Commercial BRIDGE Loan Promissory Note dated December 20, 2020, and executed by Borrower in favor of the Authority (“Authority Note”). The Authority Note is secured by that certain Deed of Trust executed by Borrower for the benefit of Authority, dated December 20, 2020, and recorded in the Official Records of Alameda County as Document No.2020348032 (“Authority Deed of Trust”) as an encumbrance against the Leasehold. The Authority Loan Agreement, Authority Promissory Note and Authority Deed of Trust, are collectively referred to as the “Authority Loan Documents”; and

WHEREAS, the term of the existing Authority Note is three years, with a maturity date of December 1, 2023. Per Borrower, due to challenges with the commercial market in the area, Borrower has been operating in a deficit as income generated from the commercial space is not sufficient to cover operating expenses; and

WHEREAS, Borrower is respectfully requesting an extension to the term of the Authority Commercial Loan for additional three years to mature on December 1, 2026, with the same interest rate and payment terms, allowing Borrower time to formulate a long-term strategy to improve the project’s financial position and develop prepayment options for the Authority Commercial Loan; and

WHEREAS, the Authority has reviewed and determined that the proposed amendment to the Authority Loan Documents to extend the term of the Authority Commercial Loan an additional 3-years, for a total 6-year term, is categorically exempt from California Environmental Quality Act (“CEQA”) pursuant to CEQA Guidelines, Common Sense Exemption, 14 CCR 15061 (b) (3), because it can be seen with certainty that there is no possibility that the proposed amendment to the Authority Loan Documents to extend the term of the Authority Commercial Loan may have a significant effect on the environment.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA:

THAT, the recitals set forth above are true and correct and incorporated herein by this reference; and

THAT, the Board of Commissioners, based upon a review of the evidence and information presented on the matter, as it relates to the amendment of the Authority Loan Documents to extend the term of the Authority Commercial Loan, has determined that the proposed amendment is categorically exempt from CEQA pursuant to State CEQA Guidelines Section 15061(b)(3) because it can be seen with certainty that there is no possibility that the activity in question will have a significant effect on the environment because the amendment is merely an extension of the loan term, the amendment will not prompt or require any construction activities and would not lead to any direct or reasonably foreseeable indirect physical environmental impacts; and

THAT, that the Board of Commissioners hereby approve the extension of the term of the Authority Commercial Loan issued to Mandela Gateway Commercial, LLC, term for an additional three years, for a total term of six years, with a new maturity date of December 1, 2026, with the same interest rate and payment terms; and

THAT, the Board of Commissioners hereby authorize and approve the Executive Director to amend the Authority Promissory Note, Authority Loan Agreement, and any other related documents, to only extend the term of the Authority Commercial Loan issued to Mandela Gateway Commercial, LLC, for an additional three years, for a new total term of six years, with a new maturity date of December 1, 2026, with the same interest rate and payment terms. No other changes shall be made; and

THAT, the Executive Director, on behalf of the Housing Authority of the City of Oakland, is hereby authorized to take all actions necessary to implement the foregoing resolution.

I hereby certify that the foregoing is a full, true and correct copy of a resolution passed by the Commissioners of the Housing Authority of the City of Oakland, California on October 23, 2023

Secretary

ADOPTED: October 23, 2023

RESOLUTION NO.



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

DS
PW

SUBJECT: Adopt a resolution authorizing the Executive Director to approve a conditional commitment for a Development Loan of MTW funds in an amount not to exceed \$9,850,000 and a Rental Assistance Subsidy (RAS) of MTW funds in an amount not to exceed \$3,615,000, subject to clearance under the National Environmental Policy Act (NEPA), and authorizing the negotiation and execution of documents related to the provision of the loan and RAS for the development of East 12th Street – Lakehouse by East 12th Street Housing, L.P., an affiliate of East Bay Asian Local Development Corporation, in partnership with Jordan Real Estate Investments.

DATE: October 23, 2023

Type: Action

2023-928

RECOMMENDATION

This action will authorize the Executive Director to execute a conditional commitment for a Development Loan in an amount not to exceed \$9,850,000 and a Rental Assistance Subsidy (RAS) in an amount not to exceed \$3,615,000 in MTW funding, subject to clearance under the National Environmental Policy Act (NEPA), to facilitate the development and construction of East 12th Street - Lakehouse located at 121 East 12th Street in Oakland.

FISCAL IMPACTS/CONSIDERATION

This action seeks to conditionally commit a Development Loan in an amount not to exceed \$9,850,000 and a RAS in an amount not to exceed \$3,615,000 for a total of \$13,465,000 in MTW funding for the purposes of developing and newly constructing 91 units of affordable housing located at 121 East 12th Street. The funding for East 12th Street - Lakehouse is available for this Project from “New TBD Projects” in FY2024 Capital Budget under #5510-00-000.

BACKGROUND

On January 31, 2023, the City of Oakland’s Housing and Community Development Department (HCDD) published its 2023-24 Notice of Funding Availability (NOFA) for New Construction of Multifamily Affordable Rental Housing. The East Bay Asian Local Development Corporation (EBALDC) and Jordan Real Estate Investments (JREI) submitted

an application dated March 30, 2023 for the new construction of East 12th Street – Lakehouse located at 121 East 12th Street in Oakland. On May 18, 2023, the City of Oakland selected the project for a conditional award of loan funds in the amount of \$15,500,000 pursuant to Resolution No. 89646 C.M.S. (see attached). In accordance with 24 CFR 983.51(b)(2) and the Oakland Housing Authority’s Moving to Work (MTW) Agreement, the Authority may award funding to projects using another entity’s competitive procurement solicitation. HCDD conducted a competitive solicitation process, and the Authority will use this competition as the basis for evaluating the Project for a potential investment.

East 12th Street - Lakehouse (Project or Lakehouse), located at 121 East 12th Street, will provide a total of 91 units of affordable apartments (including one manager’s unit), 23 of which will provide permanent supportive housing for formerly homeless families and individuals whose incomes are at or below 30% of the Area Median Income (AMI). The remaining 68 non-supportive housing units will serve families and individuals whose incomes are between 40% and 60% of AMI. Lakehouse will also include approximately 425 square feet of ground floor commercial space intended for either a non-profit services or arts and cultural organization and will be leased at below market rates.

The Project sponsor is a joint venture between East Bay Asian Local Development Corporation (EBALDC) and Jordan Real Estate Investments (JREI). As a nonprofit community development corporation, EBALDC has served the Oakland community for 48 years. EBALDC was founded in Chinatown a few blocks from the Project site and now owns and manages more than 35 residential and commercial developments.

JREI is an “emerging affordable developer” led by CEO Wayne Jordan. Established in 1998, JREI is an Oakland-based privately held commercial real estate investment firm but is new to affordable housing. Mr. Jordan is also a co-founder and current Board Treasurer and Secretary of the Akonadi Foundation, a philanthropic organization whose mission is to support the development of social change movements to eliminate structural racism. For the past two decades, the Foundation has awarded \$43 million to racial justice programs that seek to end the criminalization of black youth and youth of color in the City of Oakland and throughout Alameda County.

EBALDC has been working to execute Lakehouse on City-owned land known as the “remainder parcel” since 2016. The current proposal is the second iteration of the Project – the original development plan contemplated a 361-unit mixed income joint venture between the City, Urban Core LLC, and EBALDC. It consisted of a 270-unit market rate tower and a 91-unit midrise by EBALDC. EBALDC received an allocation of state and federal tax credits and bonds in Spring 2020, which enabled an initial closing process. However, when the overall project stalled in Fall 2020 due to the pandemic, and the market-rate developer could not regain project viability, the City Council voted to terminate the site control agreement for the mixed-income project between UrbanCore and EBALDC. In Summer 2022, City Council unanimously approved an EBALDC-only option agreement for a 100% affordable project on half of the “remainder parcel” for low- and extremely low-income families (including formerly homeless households). The other half of the site will be redeveloped by Satellite Affordable Housing Associates as a separate affordable housing community in the coming years.

Lakehouse will be developed, owned and operated by East 12th Street Housing, L.P., which includes the to-be-determined tax credit investor limited partner and two general partners: East 12th Street Housing LLC as the Managing General Partner and affiliate of EBALDC, and

101 E. 12th St Venture, LLC as the Administrative General Partner and affiliate of JREI. The site is currently owned by the City of Oakland. East 12th Street Housing, L.P. entered into a Lease Disposition and Development Agreement with the City on February 1, 2023 and expects to enter into a long term ground lease with the City at construction closing.

The other members of the development team are:

- Architect: Pyatok Architects
- General Contractor: J.H. Fitzmaurice
- Property Management: EBALDC
- Services Provider: EBALDC

To date, EBALDC has secured capital funding from the City, the State of California's Affordable Housing and Sustainable Communities (AHSC) and Infill Infrastructure Grant (IIG) programs, and the CA Debt Limit Allocation Committee (CDLAC) and CA Tax Credit Allocation Committee (TCAC) for allocations of tax-exempt bonds and 4% Low Income Housing Tax Credits respectively. The Project has also received a 20-year operating subsidy commitment for resident services from the Alameda County Health Care Services Agency (HCSA). As a condition to accepting the tax-exempt bond allocation from CDLAC, EBALDC is required to close all construction financing and issue a Notice to Proceed to start construction no later than March 4, 2024.

Additional Project Information

The Project is located in Oakland's Eastlake neighborhood adjacent to Peralta Park and the eastern edge of Lake Merritt on East 12th Street, between 2nd Avenue and Lake Merritt Boulevard.

The Project is proposed as a six-story structure with five levels of Type III construction above a Type I parking garage and first floor level. The building consists of 42 studios, 29 one-bedroom units, 15 two-bedroom units, 4 three-bedroom units, and one manager's unit. Amenities will include a ground floor lobby with a mail area, a community room with a kitchen, two resident services offices, a bike room, two property management offices, a copy room, and a conference room. Additionally, the Project offers a central laundry room on level 6 of the building with 10 washers and 10 dryers. And the Project will offer a landscaped exterior courtyard on level 2 and an at-grade courtyard along the Project's north-west edge.

The site location provides future residents of Lakehouse access to many neighborhood amenities. Within a one-mile radius, there are 13 public parks (including Lake Merritt two blocks away), two public library branches, 14 grocery stores / neighborhood markets, five public schools, four college campuses, one social service facility, four medical clinics, three pharmacies, and a significant number of public transit stations, including three BART stations: 19th Street Oakland, 12th Street Oakland City Center, and Lake Merritt.

And finally, the Project's close proximity to EBALDC's core portfolio will afford residents the opportunity to take advantage of activities, educational events, and some services such as the asset-building and job development services offered at nearby EBALDC properties as well as a wide range of support services that will be offered on site.

ANALYSIS

The Project was reviewed against the evaluation criteria and priorities established by the Board of Commissioners including the provision of adequate resident support services, integration into the surrounding community, proximity to public transportation and grocery(ies), a sound financing plan, and alignment with the Authority's mission.

The total development cost is \$103,206,772. This includes \$62.3 million in construction costs as well as site acquisition, design and engineering, legal, building permits, developer fee, financing costs, and builders risk insurance. The total development cost per unit is \$1,134,140.

Staff's primary underwriting objective is to determine project financial need. The Developer has been actively negotiating with several equity investors since early September. Based on bid responses, the Developer is seeing significantly lower equity pricing than originally projected resulting in a reduction of tax credit equity of approximately \$4,800,000. In addition, construction costs related to labor, materials, temporary power, and construction staging complications have increased at much higher rates than previous estimated and have exacerbated the budget shortfall by over \$4,000,000. And finally, higher construction loan interest costs will require notably higher interest reserves. Staff have reviewed the project budgets and background documentation and find that the \$9,850,000 requested Development Loan is appropriate to meet the Project's minimum financing needs.

In January 2023, Lakehouse was awarded an operating subsidy from Alameda County HCSA.

However, the subsidy's use is restricted for services for the 23 formerly homeless residents only. As such, the County's HCSA subsidy is insufficient to cover the total annual operating deficits which includes the portion that is a result of the extremely low rents for the units set aside for the formerly homeless residents whose actual incomes are projected to be less than 20% of AMI (or \$20,720 for a single person). The total requested RAS of \$3,615,000 is deemed to be appropriate to maintain Project viability. Should the Authority approve this request, its total contribution would be \$13,465,000 or \$147,967 per unit.

Documentation of the Loan

The proposed \$9,850,000 loan will be structured as a soft loan, accruing 3% simple interest, repayable from project excess cash flow, with a term of 55 years. The loan will be documented by a Loan Agreement, Promissory Note, Deed of Trust, and Regulatory Agreement. The Regulatory Agreement will require that 49% of the units shall remain affordable for the term of the loan and be consistent with MTW requirements. Given that the City of Oakland will maintain ownership of the land and will enter into a long-term ground lease with the limited partnership, it is expected that the Authority's deed of trust and regulatory agreements, and other lender regulatory and security documents, will be recorded against the Partnership's leasehold interest. The Authority will seek to mitigate the risk that it's regulatory requirements, including the affordability covenants, are not terminated by negotiating the addition of secured lender protections in the City's ground lease, and securing the recordation of the Authority Regulatory Agreement in a position that is most beneficial to the Authority.

In addition, the Authority will seek to negotiate the Option and Right of First Refusal to purchase the limited partner's 99.99% interest (the City requires that JREI have the First Option pursuant to the NOFA) at the end of the tax credit compliance period.

The RAS will be evidenced by a Rental Assistance Subsidy Agreement, a 55-year RAS Regulatory Agreement, and a RAS Security Agreement between the Project owner and the Authority, among other ancillary documents. Documents will include all applicable MTW requirements.

California Environmental Quality Act (CEQA)

The Project is not subject to CEQA pursuant to AB 2162 as a project providing supportive housing.

MTW Requirements

The award of MTW funding is consistent with the Authority's mission to "further the expansion of affordable housing in Oakland". Any award of MTW funds will be conditioned based upon the Project's receipt of clearances and authorizations to use federal funds.

National Environmental Protection Act (NEPA)

The execution of grant documents or other documents legally committing the Authority to fund shall be expressly conditioned on compliance with the requirements of NEPA.

Davis Bacon Wages

The Authority's funds are expected to be used for project development and construction purposes and as such, Davis Bacon wages are required under Section 12 of the U.S. Housing Act of 1937.

Section 3

Applicable Section 3 requirements will be included in the loan and RAS agreements to be executed.

Housing Quality Standards

The project must meet Housing Quality Standards prior to any disbursement of RAS funds.

ACTION REQUESTED

Staff recommends that the Board of Commissioners adopt a resolution authorizing the Executive Director to approve a conditional commitment for a Development Loan of MTW funds in an amount not to exceed \$9,850,000 and Rental Assistance Subsidy of MTW funds in an amount not to exceed \$3,615,000, subject to clearance under the National Environmental Policy Act (NEPA), and authorizing the negotiation and execution of documents related to the provision of the Loan and RAS for the development of East 12th Street – Lakehouse by East 12th Street Housing, L.P., an affiliate of East Bay Asian Local Development Corporation, in partnership with Jordan Real Estate Investments.

Attachments:

[PPT Presentation - BoC - Lakehouse 10-23-23](#)

[Reso - BoC East 12th Street Lakehouse EBALDC](#)



Oakland Housing Authority Board of Commissioners

Office of Real Estate Development

East 12th Street – Lakehouse
East Bay Asian Local Development Corporation
Jordan Real Estate Investments

October 23, 2023







East 12th Street – Lakehouse

- Located: 121 East 12th Street (“Remainder Parcel, City-owned), Eastlake neighborhood
- Sponsor / Developer: EBALDC and Jordan Real Estate Investments
 - Property Management and Services Provider: EBALDC
 - EBALDC: Managing General Partner with 0.008% ownership
 - EBALDC will also provide Property Management and Resident Support Services
 - JREI: Administrative General Partner with 0.002%; 50% of Developer Fee and cash flow; Right of First Refusal to purchase LP interests
 - TBD Investor: Limited Partner with 99.99%
- 91 units
 - 23 units set aside for formerly homeless residents
 - 67 units for families between 40% and 60% AMI
- TDC: 103.2M (1.134M / unit)
- Secured all financing, including tax exempt bonds and 4% credits – required to close all financing and issue NTP by 3/4/24



East 12th Street – Lakehouse

- EBALDC's Funding Request
 - Gap Loan: \$9,850,000 at 0-3% simple interest, repayable from surplus cashflow, 55-year term
 - Rental Assistance Subsidy: \$3,615,000
 - Total: \$13,465,000 or \$147,967 per unit
- Post-CDLAC allocation (8/23/23) financing challenges
 - Lower tax credit equity
 - Higher construction costs
- City will maintain ownership of land; long term ground lease to limited partnership
 - Anticipate OHA's deed of trust and regulatory agreement recorded against leasehold interest
 - Staff will negotiate the addition of OHA protections in the ground lease
- Staff Recommendation
 - Gap Loan: \$9,850,000
 - Rental Assistance Subsidy: \$3,615,000
 - Total OHA Contribution: \$13,465,000



East 12th Street – Lakehouse

Questions & Discussion

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

And approved by the following vote:

AYES:

NAYS:

ABSTAIN:

EXCUSED:

ABSENT:

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER:

AUTHORIZING THE APPROVAL OF A CONDITIONAL COMMITMENT FOR A DEVELOPMENT LOAN OF MTW FUNDS IN AN AMOUNT NOT TO EXCEED \$9,850,000, AND RENTAL ASSISTANCE SUBSIDY (RAS) OF MTW FUNDS IN AN AMOUNT NOT TO EXCEED \$3,615,000, SUBJECT TO CLEARANCE UNDER THE NATIONAL ENVIRONMENTAL POLICY ACT (NEPA), AND AUTHORIZING THE NEGOTIATION AND EXECUTION OF DOCUMENTS RELATED TO THE PROVISION OF THE LOAN AND RAS FOR THE DEVELOPMENT OF EAST 12TH STREET - LAKEHOUSE BY EAST 12TH STREET HOUSING, L.P.

WHEREAS, on January 31, 2023, the City of Oakland's Housing and Community Development Department (HCDD) published its 2023-24 Notice of Funding Availability for New Construction of Multifamily Affordable Rental Housing; and

WHEREAS, the East Bay Asian Local Development Corporation (EBALDC) and Jordan Real Estate Investments (JREI) submitted an application dated March 30, 2023 for the new construction of East 12th Street – Lakehouse (Project or Lakehouse) located at 121 East 12th Street in Oakland; and

WHEREAS, on May 18, 2023, HCDD selected the project for a conditional award of loan funds in the amount of \$15,500,000 pursuant to Resolution No. 89646 C.M.S.; and

WHEREAS, in accordance with 24 CFR 983.51(b)(2) and the Oakland Housing Authority's Moving to Work (MTW) Agreement, the Authority may award funding to projects using another entity's competitive procurement solicitation; and

WHEREAS, HCDD conducted a competitive solicitation process, and the Authority will use this competition as the basis for evaluating the Project for a potential investment; and

WHEREAS, the Project will provide a total of 91 units of affordable apartments (including one manager's unit), approximately 23 of which will provide permanent supportive housing for formerly homeless families and individuals whose incomes are at or below 30% of the Area Median Income (AMI); and

WHEREAS, the Project will be developed, owned and operated by East 12th Street Housing, L.P., which includes a to-be-determined tax credit investor limited partner and two general partners: East 12th Street Housing LLC as the Managing General Partner and affiliate of EBALDC, and 101 E. 12th St Venture, LLC as the Administrative General Partner and affiliate of JREI; and

WHEREAS, the site is currently owned by the City of Oakland; and

WHEREAS, East 12th Street Housing, L.P. has entered into a Lease Disposition and Development Agreement with the City dated February 1, 2023 and expects to enter into a long term ground lease with City at construction closing; and

WHEREAS, in addition to the City funds, the Project has been awarded funds from the State of California's Affordable Housing and Sustainable Communities (AHSC) and Infill Infrastructure Grant (IIG) programs, and the California Debt Limit Allocation Committee (CDLAC) and Tax Credit Allocation Committee (TCAC) for allocations of tax-exempt bonds and 4% Low Income Housing Tax Credits respectively, and has a commitment for a 20-year operating subsidy from Alameda County Health Care Services Agency; and

WHEREAS, the Project was reviewed against the Authority's evaluation criteria including the provision of adequate resident support services, integration into the surrounding community, proximity to public transportation and groceries, a sound financing plan, and alignment with the Authority's mission; and

WHEREAS, staff have reviewed the Project budgets and background documentation and find that the Project has a documented need for both development and operating funds; and

WHEREAS, the Authority desires to assist the Project with a conditional commitment of a Development Loan of Moving to Work (MTW) funds in an amount not to exceed \$9,850,000 to fill the Project's financing gap and a conditional commitment of Rental Assistance Subsidy of Moving to Work funds in an amount not to exceed \$3,615,000 in order to allow the Project to move forward; and

WHEREAS, the proposed \$9,850,000 Development Loan will be offered as a 55 year loan, with a below market rate interest rate, and deferred repayments from residual receipts, and evidenced by a Loan Agreement, Promissory Note secured by a recorded Deed of Trust, and also evidenced by a recorded Regulatory Agreement requiring a percentage of the units to be affordable for the term of the loan; and

WHEREAS, the Authority will seek to negotiate an Option and/or Right of First Refusal to purchase the limited partner's 99.99% interest in the limited partner owner at the end of the tax credit compliance period; and

WHEREAS, the requested \$3,615,000 RAS will be evidenced by a Rental Assistance Subsidy Agreement, a 55-year RAS Regulatory Agreement, and a RAS Security Agreement, among other ancillary documents; and

WHEREAS, the total funding for the Project in an amount not to exceed \$13,465,000 in MTW funding is available from "New TBD Projects" in the FY2024 Capital Budget under GL code #5510,00-000; and

WHEREAS, this award of MTW funding is consistent with the Authority's mission to "further the expansion of affordable housing in Oakland" as set forth in the Authority's MTW Plan; and

WHEREAS, this commitment of federal funds is conditioned upon compliance with the requirements of the National Environmental Protection Act (NEPA); and

WHEREAS, the Project is not subject to the California Environmental Quality Act pursuant to AB 2162 as a project providing supportive housing ; and

WHEREAS, the Authority's funds are expected to be used for Project construction purposes and as such, Davis Bacon wages will be required under Section 12 of the U.S. Housing Act of 1937; and

WHEREAS, all applicable Section 3 requirements will be included in the loan documents; and

WHEREAS, the Project must meet all Housing Quality Standards prior to any disbursement of RAS funds.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA;

THAT, the Board of Commissioners hereby finds and determines that the above recitals are true and correct, and serve, together with the Board Memorandum, as the basis of the actions of the Board of Commissioners set forth below; and

THAT, the Board of Commissioners approves the conditional commitment for a Development Loan of MTW funds in an amount not to exceed \$9,850,000 to East 12th Street Housing, L.P. for East 12th Street – Lakehouse, subject to clearance under the National Environmental Policy Act; and

THAT, the Board of Commissioners approves the conditional commitment for a Rental Assistance Subsidy of MTW funds in an amount not to exceed \$3,615,000 to East 12th

Street Housing, L.P. for East 12th Street – Lakehouse, subject to clearance under the National Environmental Policy Act; and

THAT, the Executive Director or designee, on behalf of the Authority, is hereby authorized to negotiate and execute the Development Loan Documents, the RAS Documents and the Option documents, with the advice of counsel; and

THAT, the Executive Director or designee, on behalf of the Authority, is hereby authorized to negotiate and execute any other necessary documents, with the advice of counsel, and take all actions, necessary to implement the foregoing resolution.

I certify that the foregoing resolution is a full, true and correct copy of a resolution passed by the Commissioners of the Housing Authority of the City of Oakland, California on October 23, 2023.

Secretary

ADOPTED: October 23, 2023

RESOLUTION NO.



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director 

SUBJECT: Adopt a resolution authorizing the Executive Director to purchase a Low-Income Housing Tax Credit Recapture Guarantee Surety Bond for an amount not to exceed \$120,000 and Pay Berkadia Fees for the Lion Creek Crossings Phase IV Limited Partner Buyout in an amount not to exceed \$30,000.

DATE: October 23, 2023

Type: Action

2023-929

RECOMMENDATION

Authorize the Executive Director to purchase a Low-Income Housing Tax Credit Recapture Guarantee Surety Bond for an amount not to exceed \$120,000 and pay the Berkadia fees for the Lion Creek Crossings Phase IV Limited Partner buyout in an amount not to exceed \$30,000

FISCAL IMPACTS/CONSIDERATION

Funds included in the Fiscal Year 2023-2024 approved Agency budget in budget line-item number 5510-00-000 will be used for the bond premium and Berkadia fees.

BACKGROUND

Lion Creek Crossing Phase IV (the Project, LCC Phase IV) is a 72-unit tax-credit affordable housing development with 21 public housing units located in the block bounded by Lion Way, 69th Avenue, Snell Avenue and 70th Avenue. The Project is owned and operated by Village-Side Housing Partners, L.P.

The Oakland Housing Authority (the Authority) is nearing completion of the purchase of the Investor Limited Partner and Special Limited Partner (collectively, the Limited Partners) interest in the Project from Bank of America. The Board of Commissioners authorized this transaction under Resolution No. 5147, adopted on February 27, 2023. Resolution No. 5147 authorized the Authority or its affiliate OHA Development LLC to acquire the Limited Partners' interest in the project for an amount not to exceed \$1,000 plus the Limited Partners' actual legal costs, not to exceed a combined total of \$20,000. OHA expects to complete the transaction on or around October 31, 2023. The Limited Partners' interest will be purchased by OHA Development LLC, a limited liability company with the Authority as its sole member.

Limited Partner buyouts in tax credit projects are often completed after the end of a project's 15 year tax credit compliance period. The tax credit compliance period for LCC Phase IV ends on December 31, 2026. As a result of the operations of the property over time, the Limited Partners will owe significant capital gains taxes when they sell their interest in the property. The amount of taxes they will owe is likely to increase by approximately \$300,000 each year that the buyout is delayed. As a result, Bank of America would be likely to demand a higher purchase price if the buyout is not completed until after the end of the tax credit compliance period. If OHA completed the Limited Partner buyout after the end of the tax credit compliance period and Bank of America negotiated for repayment of all of their exit taxes through the buyout price, the Limited Partner buyout price could be approximately \$1 million. Instead, Bank of America has agreed to accept an early buyout for only \$1,000. For comparison purposes, there were significant capital gains taxes owed by the Limited Partner in Lion Creek Crossings Phase I, and OHA paid \$1 million to purchase the Phase I Limited Partner's interest in the Phase I partnership.

Recapture Bond

Until the end of the tax credit compliance period, there is a risk that the Internal Revenue Service (IRS) could recapture the tax credits if the Project fails to meet all of the compliance requirements. In exchange for agreeing to exit the partnership before the end of the compliance period, Bank of America is requiring the Authority to purchase a bond to provide insurance against recapture of the tax credits.

The Authority's risk management consultants researched the market for tax credit recapture bonds and determined that this type of bond is only provided through one insurance company, CMR Risk & Insurance Services (CMR). CMR has agreed to provide a recapture bond for LCC Phase IV. The premium for this bond will be \$92,628 if the transaction closes on October 31, 2023. The bond premium may change slightly if the closing date changes.

In conjunction with the recapture bond, CMR requires an Indemnity Agreement from the Authority and OHA Development LLC agreeing to indemnify the insurance company against expenses related to executing or procuring the bond. It is unlikely that there will be any tax credit recapture and liability under the indemnity, as Related and EBALDC are experienced owners and property managers who have been operating the property without any tax credit recapture for the past 12 years in compliance with tax credit requirements. LCC IV is stable and fully leased, so it is likely that there will not be a change in operations that triggers a tax credit recapture in the remaining three years of the compliance period.

In the event that there is liability under this indemnity, the Authority and OHA Development LLC are protected by guarantees provided by the Managing General Partner, which is an entity controlled by EBALDC, to the Limited Partner under the Limited Partnership Agreement for the Project. The Limited Partnership Agreement obligates the Managing General Partner to reimburse the Limited Partner if there is a loss of tax benefits due to the disallowance or recapture of any tax benefits. EBALDC also provided a Guaranty to the Partnership for the payment and performance of the obligations of the General Partners of the Partnership, and the Guaranty continues for the benefit of the successors of the original Limited Partners. As part of the Limited Partner buyout transaction, EBALDC is executing a Reaffirmation of Guaranty Agreement reaffirming that the Guaranty in the Limited Partnership Agreement remains in full force and effect.

Berkadia Transfer Fee

Berkadia Commercial Mortgage LLC is servicing the Project's first mortgage on behalf of Citibank. Consent from Berkadia is required for the transfer of the Limited Partners' interest. In exchange for reviewing the transaction and providing consent, Berkadia will charge a \$15,000 transfer fee and charge for reimbursement of their legal fees and other costs associated with the transfer.

ACTION REQUESTED

Adopt the attached resolution authorizing the Executive Director to purchase a Low-Income Housing Tax Credit Recapture Guarantee Surety Bond for an amount not to exceed \$120,000 and pay the Berkadia fees for the Lion Creek Crossings Phase IV Limited Partner buyout in an amount not to exceed \$30,000.

Attachments:

[Reso 5147 LCC Phase IV LP Buyout 02.27.23](#)

[Resolution LCC IV Recapture Bond](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner: Gregory Hartwig

Seconded by Commissioner: Lynette Jung-Lee

and approved by the following vote:

AYES: Griffith, Hartwig, Castillo, Jung-Lee, Montgomery, Tortorich, Mayes

NAYS: 0

ABSTAIN: 0

ABSENT: 0

EXCUSED: 0

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER: 5147

ADOPT A RESOLUTION AUTHORIZING THE EXECUTIVE DIRECTOR TO ACQUIRE THE LIMITED PARTNER INTEREST IN LION CREEK CROSSINGS PHASE IV FOR AN AMOUNT NOT TO EXCEED \$20,000, AND AUTHORIZATION TO EXECUTE A CONTINUING PROJECT OPERATIONS AND EXCLUSIVE NEGOTIATION RIGHTS AGREEMENT WITH THE ADMINISTRATIVE AND MANAGING GENERAL PARTNERS INCLUDING PROVISIONS TERMINATING ANY RIGHTS OF THE MANAGING GENERAL PARTNER TO PURCHASE THE PROJECT, PROVIDING AN OPTION FOR THE AUTHORITY TO PURCHASE THE GENERAL PARTNER INTERESTS FOR A FEE OF \$100 PLUS UP TO \$50,000 TO REIMBURSE THE GENERAL PARTNERS FOR STAFF TIME AND THIRD-PARTY COSTS RELATED TO ATTEMPTING TO REPOSITION THE PROJECT, AND AGREEING TO ENGAGE IN GOOD FAITH NEGOTIATIONS BEFORE THE AUTHORITY EXERCISES ITS RIGHTS TO PURCHASE THE PROJECT

WHEREAS, Lion Creek Crossing Phase IV (the "Project") is a 72-unit tax credit affordable housing development with 21 public housing units located in the block bounded by Lion Way, 69th Avenue, Snell Avenue and 70th Avenue; and

WHEREAS, the Project is owned and operated by Village-Side Housing Partners, L.P. (the "Partnership"); and

WHEREAS, the following entities serve as partners in the Partnership: Investor Limited Partner, Bank of America, N.A.; Special Limited Partner, Banc of America CDC Special Holding Company, Inc.; Class B Special Limited Partner, OHA Coliseum LLC;

Administrative General Partner, Related/Oakland Coliseum IV Development Co. LLC (“Related”); Managing General Partner, Lion Creek IV, LLC (“EBALDC”); and

WHEREAS, the Authority holds an option to purchase the Project from the Partnership (Authority Option) pursuant to a Purchase Option Agreement dated November 1, 2010 (Option Agreement), and a right of first refusal pursuant to a Right of First Refusal Agreement dated November 1, 2010; and

WHEREAS, the Authority Option period extends from January 1, 2023, to June 30, 2030; and

WHEREAS, if the Authority does not exercise its option by June 30, 2030, EBALDC has the second option to purchase the Project; and

WHEREAS, exercising the option to purchase the Project would allow the Authority or EBALDC to own the project outright; however, this action would result in the dissolution of the Limited Partnership and the distribution of the project’s operating and replacement reserves to the members of the Partnership; and

WHEREAS, a preferred method for the Authority to assert its right to control the Project, and allow for the Investor to exit the Partnership is for an affiliate of the Authority, OHA Development LLC, to acquire the Investor and Special Limited Partners’ interest in the Partnership; and

WHEREAS, the Investor and Special Limited Partners have agreed to sell their interest to the Authority for a nominal amount \$1,000 plus reimbursement of their legal fees from the transaction; and

WHEREAS, the legal fees are estimated to be approximately \$7,000; and

WHEREAS, an allowance of up to \$20,000 for the purchase price plus legal fees is included in this resolution because actual attorney fees are unknown at this time; and

WHEREAS, the Authority intends to have its affiliate, OHA Development LLC, purchase the Investor and Special Limited Partner interests and become a Limited Partner in the Project; and

WHEREAS, the Authority seeks to enter into a Continuing Project Operations and Exclusive Negotiation Rights Agreement to govern the ongoing roles of the Authority, Related, and EBALDC in Lion Creek Crossings Phase IV.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA:

THAT, the Oakland Housing Authority or its affiliate OHA Development LLC is authorized to acquire the Investor Limited Partner and Special Limited Partner interest in Lion Creek Crossings Phase IV for an amount not to exceed \$1,000 plus the Investor

Limited and Special Limited Partners' actual legal costs, not to exceed a combined total amount of \$20,000; and

THAT, the Executive Director is authorized to execute a Continuing Property Operations and Exclusive Negotiation Rights Agreement with Related and EBALDC to govern the ongoing roles of the Authority, Related, and EBALDC in Lion Creek Crossings Phase IV; and

THAT, the Executive Director, on behalf of the Authority, is hereby authorized to take all actions necessary to implement the foregoing resolution.

I certify that the foregoing resolution is a full, true and correct copy of a resolution passed by the Commissioners of the Housing Authority of the City of Oakland, California on February 27, 2023.



Secretary

ADOPTED: February 27, 2023

RESOLUTION NO. 5147

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER:

**RESOLUTION AUTHORIZING THE EXECUTIVE DIRECTOR TO PURCHASE A
LOW-INCOME HOUSING TAX CREDIT RECAPTURE GUARANTEE SURETY BOND
FOR AN AMOUNT NOT TO EXCEED \$120,000 AND PAY THE BERKADIA
FEES FOR THE LION CREEK CROSSINGS PHASE IV LIMITED PARTNER BUYOUT
IN AN AMOUNT NOT TO EXCEED \$30,000**

WHEREAS, the Housing Authority of the City of Oakland (“Authority”) is duly created, established and authorized to transact business and exercise its powers, all under and pursuant to the provision of the Housing Authorities Law which is Part 2 of Division 24 of the California Health and Safety Code commencing with Section 34200 et seq.; and

WHEREAS, Lion Creek Crossing Phase IV (the Project, LCC Phase IV) is a 72-unit tax-credit affordable housing development with 21 public housing units located in the block bounded by Lion Way, 69th Avenue, Snell Avenue and 70th Avenue; and

WHEREAS, the Oakland Housing Authority (the Authority) is nearing completion of the purchase of the Investor Limited Partner and Special Limited Partner (collectively, the Limited Partners) interest in the Project from Bank of America; and

WHEREAS, the Board of Commissioners authorized this transaction under Resolution No. 5147, adopted on February 27, 2023; and

WHEREAS, the Limited Partners’ interest will be purchased by OHA Development LLC, a limited liability company with the Authority as its sole member; and

WHEREAS, the purchase of the Limited Partners’ interest will take place before the end

of the Project's tax credit compliance period; and

WHEREAS, until the end of the tax credit compliance period, there is a risk that the Internal Revenue Service (IRS) could recapture the tax credits if the Project fails to meet all of the compliance requirements; and

WHEREAS, in exchange for agreeing to exit the partnership before the end of the compliance period, Bank of America is requiring the Authority to purchase a bond to provide insurance against recapture of the tax credits; and

WHEREAS, the Authority's risk management consultants researched the market for tax credit recapture bonds and determined that this type of bond is only provided through one insurance company, CMR Risk & Insurance Services (CMR); and

WHEREAS, CMR has agreed to provide a recapture bond for LCC Phase IV; and

WHEREAS, in conjunction with the recapture bond, CMR requires an Indemnity Agreement from the Authority and OHA Development LLC agreeing to indemnify the insurance company against expenses related to executing or procuring the bond; and

WHEREAS, Berkadia Commercial Mortgage LLC is servicing the Project's first mortgage on behalf of Citibank; and

WHEREAS, consent from Berkadia is required for the transfer of the Limited Partners' interest; and

WHEREAS, in exchange for reviewing the transaction and providing consent, Berkadia will charge a \$15,000 transfer fee and charge for reimbursement of their legal fees and other costs associated with the transfer.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA:

THAT, the above referenced recitals are true and correct and incorporated herein by reference; and

THAT, the Board of Commissioners, hereby authorizes the Executive Director to purchase a Low-Income Housing Tax Credit Recapture Guarantee Surety Bond (Bond) through CMR Risk & Insurance Services for an amount currently estimated at \$92,628 and not to exceed \$120,000; and

THAT, the Board of Commissioners, hereby authorizes the Executive Director to execute a General Indemnity Agreement for the benefit of the insurance company executing the Bond; and

THAT, the Board of Commissioners, hereby authorizes the Executive Director to pay Berkadia Commercial Mortgage LLC a \$15,000 transfer fee and their actual legal fees

and other costs associated with the transfer in a combined amount not to exceed \$30,000;
and

THAT, the Executive Director, on behalf of the Authority, is hereby authorized to take all actions necessary to implement the foregoing resolution; and

THAT, if any section, paragraph, or provision of this Resolution shall be held to be invalid or unenforceable for any reason, such invalidity or unenforceability shall not affect any remaining provisions hereof; and

THAT, this Resolution shall take effect from and after its adoption.

*I certify that the foregoing resolution is a full, true and correct copy
of a resolution passed by the Commissioners of the Housing Authority
of the City of Oakland, California on October 23, 2023.*

Secretary

ADOPTED:

RESOLUTION NO.



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director DS
PW

SUBJECT: Adopt a resolution authorizing the Executive Director to execute and submit a Rental Assistance Demonstration Application to the U.S. Department of Housing and Urban Development, including a Certification and Board Approval for the conversion of the Public Housing units in Lion Creek Crossings Phase I and II (AMP CA003000119) to RAD Project-Based Vouchers and Section 18 Tenant Protection Vouchers.

DATE: October 23, 2023

Type: Action

2023-930

RECOMMENDATION

Authorize the Executive Director to execute and submit a Rental Assistance Demonstration Application to the U.S. Department of Housing and Urban Development, including a Certification and Board Approval for the Public Housing Units in Lion Creek Crossings Phase I and II

FISCAL IMPACTS/CONSIDERATION

Impacts of a RAD conversion of the Public Housing units in Lion Creek Crossings Phase I and II on OHA's revenue are discussed below.

BACKGROUND

Lion Creek Crossings Background

Lion Creek Crossings Phase I (881 and 915 69th Avenue, Oakland, California, APNs 41-4212-4 and 41-4212-5) and Phase II (910 66th Avenue and 6865 Leona Creek Drive, Oakland, California, APNs 41-4212-10-1 and 41-4212-11) are two communities of the five-phase Lion Creek Crossings development near the Coliseum in East Oakland. Lion Creek Crossings redeveloped the former Coliseum Gardens Public Housing site into a mixed-finance property with 567 total units. Lion Creek Crossings was financed with Housing Opportunities for People Everywhere (HOPE VI) grants from the U.S. Department of Housing and Urban Development (HUD) which were loaned to the project by the Oakland Housing Authority (OHA), additional OHA loans, Public Housing subsidy and Project-Based Vouchers from OHA, Low-Income Housing Tax Credits (LIHTC), loans and grants from the City of Oakland and State of California, and mortgage loans.

Lion Creek Crossings was developed through a partnership of OHA, Related California (Related), and the East Bay Asian Local Development Corporation (EBALDC). Each phase of Lion Creek Crossings is owned by a separate limited partnership. An entity controlled by EBALDC is the Managing General Partner and an entity controlled by Related is the Administrative General Partner of each partnership. OHA continues to own the land at Lion Creek Crossings and ground leases it to each of the limited partnerships. See below for a table summarizing the units in the five phases of Lion Creek Crossings.

Phase	Year Comp.	Pop. Served	Total Units	Public Housing Units	PBV Units
1	2005	Families	115	45	0
2	2007	Families	146	54	18
3	2008	Families	106	37	16
4	2011	Families	72	21	10
5	2014	Seniors	128	0	127
Total			567	157	171

Initially, a tax credit investor was the Limited Partner in each partnership. In developments financed with LIHTC, it is customary for the General Partner or another entity with a long-term interest in the property to acquire the property or the Limited Partner's interest in the partnership at the end of the 15-year tax credit compliance period. For each phase, OHA had, or currently has, the first option to acquire the property at the end of the compliance period. In lieu of acquiring the properties outright, OHA has acquired the Limited Partners' interest to become the Limited Partner in Phases I and II, and it is currently completing the process to acquire the Limited Partner interests in Phases III and IV. The tax credit compliance period for Phase V runs through 2028. OHA will explore acquiring the property or the Limited Partner interest in Phase V as the end of the compliance period approaches.

Phase I and II Rehab and Resyndication

In the past, owners of affordable housing developments often used 4% LIHTC to finance major rehabilitations of the property after completion of the initial tax credit compliance period. For example, OHA has been involved with tax credit-financed rehabs of Keller Plaza and Oak Grove North and South.

In order to use 4% LIHTC for a project, it is required that a portion of the project costs are financed with tax-exempt bonds. Tax-exempt bonds are awarded by the California Debt Limit Allocation Committee (CDLAC). There is a statewide annual cap on tax-exempt bond authority. Prior to 2019, California did not use all of its bond authority and bond allocations were available to qualifying rehab projects on a non-competitive basis. Since 2019, demand for tax exempt bonds has exceeded the annual cap. CDLAC instituted a competitive process for allocating bonds to projects. Also, CDLAC allocated an extremely limited amount of bonds to rehab projects and owners reduced the number of rehab projects they pursued.

CDLAC typically awards bonds to projects through three application rounds each year. In 2023, new construction projects could not use all of the bonds available in Round 1 and 2. On July 26, 2023, CDLAC changed its regulations to allow rehab projects to use remaining bonds available in Round 3. Approximately \$1 billion in bond authority carried over from Round 1 and 2 to Round 3.

With the unusual availability of tax-exempt bonds and tax credits for rehab projects, Related and EBALDC evaluated potential rehab needs for Lion Creek Crossings Phase I and II. They commissioned a Facility Condition Assessment for each development. These assessments identified rehab needs including, but not limited to, balcony repairs due to moisture intrusion, repairs to exterior stair connections to balconies, new roofs, and replacement of outdated boilers and HVAC equipment. The replacement reserves held by the partnerships are approximately \$400,000 for Phase I and \$452,000 for Phase II, which is not sufficient to fund the rehab needs of the properties.

Related and EBALDC determined that a tax credit-financed rehab of the project could be feasible and desirable to finance the considerable rehab needs of the properties. Obtaining new tax credit financing for a property that was previously financed with tax credits is referred to as “resyndication.” Through resyndication, a construction budget of approximately \$12.2 million for Phase I and \$11.6 million for Phase II could be funded. Related and EBALDC submitted applications to CDLAC and the California Tax Credit Allocation Committee (TCAC) for 4% tax credits and tax-exempt bonds for Lion Creek Crossings Phase I and II on September 6, 2023.

If the applications are successful, CDLAC will make an award at its meeting on December 6, 2023, and the projects would be required to begin rehabilitation approximately six months from the date of the award. Based on preliminary scoring information that has been released by CDLAC, it appears likely that both Phase I and Phase II will receive an allocation of tax credits and bonds.

OHA submitted non-binding letters of support for inclusion in the CDLAC/TCAC applications and acknowledging the role that OHA may play in the resyndication transactions, including assigning the ground leases to new tax credit partnerships, selling the improvements to the new partnerships, and assigning its existing loans to the new partnerships and extending the term of the loans. OHA has not made any binding commitments to support the resyndication transactions, and future approval from the Board of Commissioners is required before OHA enters into agreements related to the resyndication transactions. OHA, Related and EBALDC will continue to negotiate on the terms of OHA’s involvement in the transactions.

RAD Conversion

The Rental Assistance Demonstration (RAD) is a HUD program to allow for the conversion of Public Housing units to units with Section 8 Project-Based Vouchers (PBVs) or Project-Based Rental Assistance. RAD PBVs are new vouchers provided to the Housing Authority that are project-based at the converting property or another property. RAD PBVs have a level of funding approximately equal to the amount of funding HUD provided to the Public Housing units. The level of HUD funding and contract rent for RAD PBVs is lower than that provided for non-RAD PBVs. OHA’s current payment standard, which is the maximum monthly assistance payment for a family in the Section 8 voucher program, is 120% of the 2022 HUD Fair Market Rent for Oakland.

RAD/Section 18 Blend

Section 18 is another program under which HUD permits the conversion of Public Housing units to PBV units. Under Section 18, HUD provides Tenant Protection Vouchers (TPVs), which are funded at the same level as “standard” PBVs. There are a number of ways that Public Housing properties can qualify for disposition under Section 18. The most common is

obsolescence which is evidenced by having high rehab costs.

HUD provides “RAD/Section 18 blends” for projects that do not qualify for a full Section 18 conversion, but still have significant rehab costs. In a RAD/Section 18 blend, TPVs are provided for a portion of the units and RAD PBVs are provided for the remainder. Both types of vouchers are provided through a single RAD application process. For Lion Creek Crossings Phase I and II, the planned rehab construction costs would qualify the projects to receive Section 18 TPVs for 20 percent of the Public Housing units, or nine units in Phase I and 10 units in Phase II. The inclusion of the TPVs in the project will increase the income generated by Lion Creek Crossings Phase I and II.

OHA, Related, and EBALDC wish to pursue a RAD conversion for the Public Housing units in Lion Creek Crossings Phase I and II in conjunction with the resyndication and rehab of the properties. Completing a RAD conversion will improve the properties’ cash flow, allowing them to support a larger mortgage to finance the resyndication and rehab transaction. It will also streamline compliance responsibilities of both OHA and the property management company by converting Public Housing units, which have separate eligibility and compliance requirements, to the PBV platform. RAD PBVs may have more stable and predictable funding over time than Public Housing units. RAD contract rents are adjusted annually based on the HUD Operating Cost Adjustment Factor (OCAF) formula, while Public Housing subsidies are determined by the amount of funding Congress provides to the Public Housing program through annual appropriations. Funding for the Section 8 Voucher Program, including RAD PBVs and TPVs, is also subject to annual appropriation; however, these programs have typically been fully funded by Congress while the Public Housing Program has not been fully funded.

To receive approval for a RAD conversion, the project must conduct a capital needs assessment and demonstrate that it is completing work to meet the immediate capital needs of the project and that the project will be able to fund its projected capital needs for the next 20 years. For this reason, RAD conversions are often completed at the same time that projects are resyndicated and rehabbed.

The RAD program has a number of provisions designed to minimize the impact of the conversion on tenants. Under both the Public Housing and Section 8 Voucher programs, the tenant portion of rent is based on 30% of the tenant’s adjusted gross income, so the amount of rent paid by the tenant will not change. Existing Public Housing tenants are not rescreened for eligibility at conversion to RAD.

There are extensive tenant relocation protections with RAD conversions, including the tenants’ right to return to a unit in the converted project. In the Lion Creek Crossings Phase I and II rehabs, it is anticipated that there will be minimal relocation needed, and all relocations will be short-term. It is not expected that any residents will be asked to move to different units as a result of the resyndication and rehab or the RAD conversion.

RAD Application

The Public Housing Authority is required to submit an application to HUD to initiate the RAD conversion process. The project sponsors, Related and EBALDC, will assist OHA with the application and conversion process. The application, review, and approval process can take six to nine months. Therefore, OHA, Related and EBALDC would like to submit the application as soon as it can be completed and before finding out if the projects will receive a bond and

tax credit award in December. A Board approval is required to be submitted with the RAD application, providing that the Executive Director has the authority to submit the application on behalf of the Authority and making various certifications regarding the RAD program. For this reason, approval of the attached resolution authorizing the RAD application is requested at tonight's meeting, while other approvals related to the resyndication transaction will not be requested until future meetings.

Financial Impacts of RAD Conversion

RAD conversions are designed to be approximately revenue-neutral to the Housing Authority. However, there are some financial impacts of a RAD conversion.

HUD funds Public Housing units through Operating Subsidy and Capital Fund Program (CFP) Grants. OHA retains five percent of the operating subsidy as an Oversight Fee. In 2022, OHA's oversight fee was \$19,776 for Phase I and \$23,731 for Phase II, or \$43,507 for both phases. OHA would not continue to earn the Oversight Fee after a RAD conversion.

For mixed-finance projects like Lion Creek Crossings, OHA provides the Operating Subsidy to the project but retains the CFP Grant. With a RAD conversion, both the Operating Subsidy and CFP Grant amounts are included in the RAD contract rent. OHA would no longer receive CFP Grants for Lion Creek Crossings Phase I and II. In 2022, the CFP Grant for Lion Creek Crossings Phase I and II was \$206,862.

Partially offsetting these reductions in income, HUD would increase the Section 8 Administrative Fee (Admin. Fee) paid to OHA to administer the 99 additional PBVs that converted from Public Housing at the two properties. OHA's 2022 Admin. Fee for additional vouchers was \$133.99 per voucher per month. The current Admin. Fee is funded at approximately 90%, therefore HUD would provide approximately \$143,262 per year in Admin. Fee.

As shown below, the net financial impact of the RAD conversion to OHA would be a loss of approximately \$107,000 in income per year.

Net Financial Impacts to OHA of RAD Conversion

Oversight Fee (Loss)	(\$43,507)
CFP Grant (Loss)	(\$206,862)
Section 8 Admin Fee (Gain)	\$143,262)
Net Financial Impact (Loss)	(\$107,107)

OHA, Related, and EBALDC will negotiate other fees to be paid to OHA by the project post-resyndication. OHA may be able to recoup some of this amount through such other fees and cash flow distributions.

ACTION REQUESTED

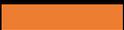
Adopt the resolution authorizing the Executive Director to execute and submit a Rental Assistance Demonstration Application to the U.S. Department of Housing and Urban Development, including a Certification and Board Approval for the Public Housing Units in Lion

Creek Crossings Phase I and II.

Attachments:

[RAD Board Presentation](#)

[Resolution LCC I II RAD Application](#)



What is RAD?

Lion Creek Crossings Phase I & II
Authorization for RAD Application

October 23, 2023





What is RAD?

- HUD Rental Assistance Demonstration
- There are three types of units at Lion Creek Crossings:
 - Unsubsidized Tax Credit Units
 - Units with HUD Rental Assistance
 - Public Housing
 - Section 8 Project Based Vouchers
- With RAD, Public Housing units convert to Section 8 Project Based Vouchers.
- HUD provides funding for RAD PBVs at the same level it funded the Public Housing



RAD Background

- Created in 2012
- Initially capped at 60,000 Public Housing units. Current cap is 455,000 units.
- 221,000 units in 1,600 properties have been converted and 55,000 units are in the HUD pipeline.
- Tool to address deterioration and underfunding of capital needs for Public Housing
 - Approximately \$35 billion in estimated capital needs for 1 million Public Housing units
 - RAD allows additional funding sources to be brought in to finance rehab or replacement: loans, tax credit equity, grants
- Some PHAs have converted 100% of Public Housing through RAD.



RAD/Section 18 Blends

- Section 18
 - Program for disposition of Public Housing units
 - Multiple ways to qualify – most common is “obsolescence” – high rehab costs
 - OHA examples: Oak Grove North & South, Harrison Tower
 - Funding for replacement units is provided through Tenant Protection Vouchers (TPVs)
 - With TPVs, HUD funding and contract rents are higher than RAD
- RAD/Section 18 Blends
 - TPVs are provided for a portion of the units in a RAD conversion based on rehab costs



Blend Amounts

- Percentage of PBVs is based on rehab construction costs as a percentage of the HUD "Housing Construction Cost" limit for the project

Required HCC Threshold	RAD / Section 18 Blend Percent
>30%	80% RAD / 20% Section 18
>60%	60% RAD / 40% Section 18
>90%	40% RAD / 60% Section 18
>90% + in high-cost area	20% RAD / 80% Section 18



Lion Creek Crossings HCC

Phase I				Phase II			
	Units	HCC Limit/ Unit	Total HCC Limit		Units	HCC Limit/ Unit	Total HCC Limit
1 BR	15	\$151,057	\$2,265,855	1 BR	28	\$151,057	\$4,229,596
2 BR	32	191,408	6,125,056	2 BR	62	191,408	11,867,296
3 BR	49	252,419	12,368,531	3 BR	43	252,419	10,854,017
4 BR	16	312,908	5,006,528	4 BR	5	312,908	1,564,540
5 BR	<u>3</u>	352,652	<u>1,057,956</u>	5 BR	<u>7</u>	352,652	<u>2,468,564</u>
Total	115		\$26,823,926		145		\$30,984,013
Rehab Costs			\$11,630,938				\$11,630,938
% of HCC Limit			43%				38%



Lion Creek Crossings Blend Amounts

- Rehab is 43% of HCC limit for Phase I, 38% for Phase II

Required HCC Threshold	RAD / Section 18 Blend Percent
>30%	80% RAD / 20% Section 18
>60%	60% RAD / 40% Section 18
>90%	40% RAD / 60% Section 18
>90% + in high-cost area	20% RAD / 80% Section 18

	Phase I	Phase II
Public Housing Units	45	54
% Section 18	20%	20%
Section 18 TPVs	9	10
% RAD	80%	80%
RAD PBVs	36	44



Financial Impacts to OHA from LCC RAD

- With no more Public Housing units, OHA would no longer receive Public Housing Oversight Fee
 - 5% of Public Housing Operating Subsidy
- With RAD conversion, OHA would no longer receive Capital Fund Program Grant
 - Currently retained by OHA. CFP shifts to RAD Contract Rents
- With RAD conversion, OHA would receive Section 8 Admin. Fee for 99 new PBVs

Oversight Fee (Loss)	(\$43,507)
Capital Fund Grant (Loss)	(\$206,862)
Section 8 Admin. Fee (Gain)	<u>\$143,262</u>
Net Financial Impact (Loss)	(\$107,107)

- Additional fees or ground lease rent post-conversion may be negotiated to offset loss



Resident Rights and Protections

- Initial written notification – RAD Information Notice
- Resident meetings prior to the RAD application and through the process
- Relocation
 - If relocation is required due to construction, tenants have the right to return to their unit or another unit in the property.
 - If relocation is required, tenants are entitled to relocation assistance.
 - With the planned rehab work at Lion Creek Crossings, short-term relocation for a small number of units is expected. Related/EBALDC will manage relocation and provide relocation benefits with OHA oversight.
- Residents have the right to establish and operate a resident organization and to receive resident participation funding.



- What will change for tenants?
 - New lease
 - Section 8 briefing with OHA
 - Income certifications with OHA Leased Housing Department
 - Access to Housing Choice Voucher
 - “Choice Mobility” – Tenant may request a Housing Choice Voucher after one year with a Project Based Voucher
- What won't change for tenants?
 - Eligibility for housing – no rescreening at conversion
 - Rent amount – Public Housing and Section 8 rents are both based on 30% of Adjusted Gross Income

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER:

**RESOLUTION AUTHORIZING THE EXECUTIVE DIRECTOR TO EXECUTE AND
SUBMIT A RENTAL ASSISTANCE DEMONSTRATION APPLICATION TO THE U.S.
DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT, INCLUDING A
CERTIFICATION AND BOARD APPROVAL FOR THE CONVERSION OF THE
PUBLIC HOUSING UNITS IN LION CREEK CROSSINGS PHASE I AND II (AMP
CA003000119) TO RAD PROJECT-BASED VOUCHERS AND SECTION 18 TENANT
PROTECTION VOUCHERS**

WHEREAS, the Housing Authority of the City of Oakland (“Authority”) is duly created, established and authorized to transact business and exercise its powers, all under and pursuant to the provision of the Housing Authorities Law which is Part 2 of Division 24 of the California Health and Safety Code commencing with Section 34200 et seq.; and

WHEREAS, Oakland Coliseum Housing Partners LP is a California Limited Partnership that owns the 115 unit affordable housing complex at 881 and 915 69th Avenue, Oakland, California (APNs 41-4212-4 and 41-4212-5), commonly known as “Lion Creek Crossings Phase I”; and

WHEREAS, Lion Way Housing Partners LP, is a California Limited Partnership that owns the 146 unit affordable housing complex at 910 66th Avenue and 6865 Leona Creek Drive, Oakland, California (APNs 41-4212-10-1 and 41-4212-11), commonly known as “Lion Creek Crossings Phase II”; and

WHEREAS, Lion Creek Crossings Phase I and II (the Properties) are two components of the five-phase Lion Creek Crossings development near the Coliseum in East Oakland;

and

WHEREAS, Lion Creek Crossings was developed through a partnership of the Authority, Related California (Related), and the East Bay Asian Local Development Corporation (EBALDC); and

WHEREAS, each phase of Lion Creek Crossings is owned by a separate limited partnership in which an entity controlled by EBALDC is the Managing General Partner and an entity controlled by Related is the Administrative General Partner; and

WHEREAS, the Authority owns the land at Lion Creek Crossings and ground leases it to each of the limited partnerships; and

WHEREAS, Related and EBALDC determined that a tax credit-financed rehabilitation of the Properties could be feasible and desirable to finance the considerable rehab needs of the Properties; and

WHEREAS, Related and EBALDC submitted applications to the California Debt Limit Allocation Committee and the California Tax Credit Allocation Committee for 4% tax credits and tax-exempt bonds for a resyndication of the Properties; and

WHEREAS, there are 99 Public Housing units in the Properties among the 261 total units; and

WHEREAS, the Rental Assistance Demonstration (RAD) is a U.S. Department of Housing and Urban Development (HUD) program to allow for the conversion of Public Housing units to units with Section 8 Project-Based Vouchers (PBVs) or Project-Based Rental Assistance; and

WHEREAS, the Authority, Related, and EBALDC wish to pursue a RAD conversion for the Public Housing units in Lion Creek Crossings Phase I and II in conjunction with the resyndication and rehabilitation of the Properties; and

WHEREAS, it is anticipated that completing a RAD conversion will improve the Properties' cash flow, allowing them to support a larger mortgage to finance the resyndication and rehab transaction and streamline compliance responsibilities of both the Authority and the property management company; and

WHEREAS, HUD provides "RAD/Section 18 Blends" for projects that do not qualify for a full Section 18 conversion, but still have significant rehab costs, where Tenant Protection Vouchers (TPVs) are provided for a portion of the units and RAD PBVs are provided for the remainder; and

WHEREAS, for Lion Creek Crossings Phase I and II, the planned rehabilitation construction costs are expected to qualify the projects to receive Section 18 TPVs for 20 percent of the Public Housing units, or nine units in Phase I and 10 units in Phase II; and

WHEREAS, it is anticipated that the inclusion of the TPVs in the Properties will increase the income generated by Lion Creek Crossings Phase I and II; and

WHEREAS, the Authority desires to submit a RAD application to HUD to assist in the financing of the rehabilitation of the Properties and as part of the RAD application, HUD requires a certification that that submission of the application by the Authority has been authorized, and that the Authority agrees to comply with the applicable requirements of the RAD program.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA:

THAT, the above referenced recitals are true and correct and incorporated herein by reference and serve, together with the Board Memorandum, as the basis of the actions of the Board of Commissioners set forth below; and

THAT, the Board of Commissioners, hereby authorizes the submission of a RAD Program Application to the U.S. Department of Housing and Urban Development; and

THAT, the Executive Director or designee, is authorized to execute the RAD Program Application and certification that the Authority agrees to comply with all requirements of the RAD Program and applicable HUD notices; and

THAT, if RAD Program application should be approved by HUD, this Resolution also authorizes the execution of all applicable award agreements including, but not limited to, a Mixed Finance Affidavit, RAD Conversion Commitment, RAD Use Agreement, and RAD Housing Assistance Payment Contract; and the implementation of the RAD Program Plan as described in the application; and

THAT, the Executive Director, on behalf of the Authority, is hereby authorized to take all actions necessary to implement the foregoing resolution; and

THAT, if any section, paragraph, or provision of this Resolution shall be held to be invalid or unenforceable for any reason, such invalidity or unenforceability shall not affect any remaining provisions hereof; and

THAT, this Resolution shall take effect from and after its adoption.

I certify that the foregoing resolution is a full, true and correct copy of a resolution passed by the Commissioners of the Housing Authority of the City of Oakland, California on October 23, 2023.

Secretary

ADOPTED:

RESOLUTION NO.



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director 

SUBJECT: Informational presentation on the Fiscal Year 2023 Moving to Work Annual Report.

DATE: October 23, 2023

Type: Informational 2023-919

RECOMMENDATION

This item provides an overview of the Oakland Housing Authority's Moving to Work (MTW) program performance for the year, compliance with MTW statutory requirements, and a synopsis of the contents of the Authority's Fiscal Year (FY) 2023 MTW Annual Report submission.

FISCAL IMPACTS/CONSIDERATION

No funding is required.

BACKGROUND

The U.S. Department of Housing and Urban Development (Department) requires the Oakland Housing Authority (Authority) to submit the FY 2023 MTW Annual Report, which details the performance outcomes for the activities conducted by the Authority from July 1, 2022 to June 30, 2023. The Annual Report provides an overview of the outcomes for program activities implemented under the Authority's MTW Agreement and verifies that the Authority met the five statutory requirements:

1. Ensure that at least 75 percent of the families assisted by the Authority are very low-income families; and
2. Assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and
3. Maintain a comparable mix of families (by family size), as would have been provided had the amounts not been used under the demonstration.
4. Ensure that all housing assisted under the MTW demonstration meets Housing Quality Standards (HQS) or other standards for housing integrity approved by the Secretary; and
5. Establish a reasonable rent policy.

The MTW Annual Report provides the Department with sufficient information, along with electronic data submissions, to determine the Authority's compliance with statutory obligations, such as whether it served the required baseline number of families during the fiscal year. The Authority does not report on non-MTW programs like Veteran's Affairs Supportive Housing (VASH) or Mainstream in the MTW Annual Report.

ANALYSIS

The Report frames the results of the Authority's performance in relation to the goals and projections set forth at the beginning of the year in the MTW Annual Plan. The Report aims to highlight achievements throughout the year, while also providing the Department with information on MTW specific successes and challenges. During FY 2023, the Authority successfully increased the number of families served through our local non-traditional programs, demonstrated by a 25% increase in the Sponsor-Based Housing Assistance Program. The Authority achieved 100% lease up Brooklyn Basin's Foon Lok West, adding 130 new affordable housing units to the portfolio, and began construction on Foon Lok East achieving 61% completion, despite an unusually rainy winter. The Report chronicles these accomplishments and the innovative strategies employed by the Authority under MTW to assist as many families as possible using methods in line with its strategic goals of exceptional customer service, impactful resident services, preservation and development of affordable housing, and expansion of Board knowledge of the Authority.

While the Department has not yet approved the final numbers, preliminary estimates show that in FY 2023 the Authority served about 98% of its required baseline number of families across all its MTW programs.

Public Comment:

The Authority is not required to publish the MTW Annual Report for public comment, however, in line with Authority practice, staff will present and review the Report at the Resident Advisory Board meeting. The final draft will also be posted in the Reports and Policies section, on the Authority website, www.oakha.org.

ACTION REQUESTED

No action requested.

Attachments:

[CA003 FY 2023 MTW Annual Report-Final.pdf](#)
[Presentation - MTW Annual Report 2023.pdf](#)

Making Transitions Work

ANNUAL REPORT



Supporting Our OHA Community



Oakland Housing
Authority

FISCAL YEAR 2023
JULY 1, 2022 – JUNE 30, 2023

DRAFT

Oakland Housing Authority

Fiscal Year 2023 MTW Annual Report

Board of Commissioners

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Gregory D. Hartwig, Vice Chair
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Lynette Jung Lee
Barbara Montgomery
Mark J. Tortorich
William Mayes

Patricia Wells, Executive Director

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Dominica Henderson, Chief Social Impact Officer
Anna Kaydanovskaya, Director, Asset Management
Victor Madamba, Director of Finance
Mark Schiferl, Director, Property Management
Nicole Thompson, Director, Family and Community Partnerships

Prepared by: Julie Christiansen and Melissa Benik

With additional contributions from Teela Carpenter, Joetta Farrow, Ahmed Karimi, Vicki Kolen, Caroline Barnett, Carmella Farr, Martha Jimenez, Jamie Manalang, Hanan Albatain, Krinzia Lopez, Clara Velasco, Deni Adaniya, Erika McLitus, Alex Waggoner, Anders Lee, Jose Romero and Jonathan Young.

**1619 Harrison Street
Oakland, CA 94612
(510) 874-1500
www.oakha.org**

Oakland Housing Authority

Fiscal Year 2023 MTW Annual Report

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Message from the Executive Director



As OHA celebrated 85 years of service to the vibrant Oakland community, Fiscal Year (FY) 2023 reinvigorated all as OHA re-instated more in-person engagement with our clients, our fellow housers, and each other. The Annual Report showcases the talent, outcomes and enthusiasm of the OHA family, together and through our partners, as we worked to serve our residents with safe, affordable, and service enriched housing. FY 2023 proved to be a year filled with achievements, new partnerships, and as always, challenges and learning opportunities. While the impacts of COVID became more manageable, new challenges arose. Extreme weather wreaked havoc on the state, with torrential atmospheric rivers leading to downed trees and flooding, impacting OHA's portfolio. In response, our incredible staff joined together to assist all impacted residents quickly, necessitating around the clock vigilance. Our teams deployed special purpose vouchers awarded to help populations most at risk, including those without homes and emancipated

foster youth. As we look back on the year in review, we celebrate OHA's ability to grow existing programs and explore new avenues to partner and serve our community. We value the lessons learned from our successes as well as when we fell short of our goals all while consistently adapting our operations and policies to produce strong outcomes, ensuring the health and safety of our staff and the residents who call our community home.

OHA was thrilled to support the Biden-Harris administration's prioritization of housing through *All In: The Federal Strategic Plan to Prevent and End Homelessness* which sets a lofty, but achievable goal, to reduce homelessness by 25% by 2025. OHA's priorities aim high to reinforce and help attain this presidential initiative.

Our programs offered a holistic approach to housing by strengthening community partnerships and provided a wide array of services. Home is security. Home is safety. Home is opportunity. Home is the foundation. It is a place of refuge, calm, and belonging. Safe and accessible housing has the power to transform communities into thriving centers of opportunity, elevating all facets. OHA provided hot lunches, delivered fresh groceries, improved education outcomes, hosted a score of job fairs and encouraged community building among residents by opening common areas for games and arts and crafts. Evidence supports "home" as a key determinate of strong, thriving, equitable communities. Services enriched housing was integral in supporting a foundation of stably housed citizens securing the bright futures and health of many OHA residents.

I would like to take this opportunity to thank our HUD partners for providing the critical resources and support necessary to reduce homelessness and housing insecurity, outgoing Oakland Mayor Libby Schaaf for 8 years of strong leadership and partnership and the enthusiasm of incoming Mayor Sheng Thao to work with OHA to house Oaklanders, the City of Oakland for the fervent advocacy and creativity to identify housing solutions on behalf of low-income families, our Alameda County partners and Continuum of Care leadership team for new partnerships to achieve our collective goals, the contingent of Bay Area regional housing authorities for an open and collaborative approach to boost success for all, and importantly, the dedicated public servants that make up the staff team of OHA who delivered

vital services to the Oakland community during an eventful and productive year, and all other partners who have made 85 years of service in Oakland possible.

Section I. Introduction

The Oakland Housing Authority (OHA), established in 1938 to assure the availability of quality housing for low-income persons, is pleased to release its Fiscal Year (FY) 2023 Moving to Work Annual Report. As one of 39 original participants, and with 87 expansion agencies in the US Department of Housing and Urban Development's (HUD) Moving to Work (MTW) demonstration program, OHA has the opportunity to explore and test new and innovative methods of delivering housing and supportive services to low-income residents. As an MTW demonstration participant, OHA uses the flexibility of the program, which waives certain provisions of the Housing Act of 1937 and HUD's subsequent regulations, as an opportunity to design its services to address specific and local market conditions and the needs of our residents. OHA rebranded the program as "Making Transitions Work" to better describe the opportunities created for residents of all ages and stages in life, achieving goals of employment, education, housing stability and self-sufficiency while promoting and supporting strong communities and neighborhoods.

On March 31, 2004, HUD and OHA executed an MTW Demonstration Agreement governing the terms and conditions under which HUD authorized OHA to participate in MTW through March 30, 2011. On February 4, 2009, HUD and OHA executed an Amended and Restated MTW Agreement revising the terms and conditions of the agreement and extending OHA's participation in the MTW Demonstration Program through June 30, 2018. The FY 2016 Appropriations Act ("the Act"), Section 239 (Public Law 114-113), instructed HUD to extend the existing Agreements with current MTW agencies and expand the MTW demonstration program by an additional 100 high-performing Public Housing Agencies over a period of seven years. The Act also stipulated that a Research Advisory Committee (RAC) be formed to advise the Secretary of HUD on specific policy proposals and methods of research and evaluation for the demonstration. In May 2016, OHA's Board of Commissioners approved a ten-year extension of the MTW Agreement with HUD, extending the contract through 2028 with the same terms and conditions as authorized by the Act and the MTW Agreement. This extension allowed OHA to continue its localized housing programs with innovations removing barriers to housing for the households served. Currently, there are 126 MTW PHAs nationwide.



Map of MTW agencies across the US

In accordance with the MTW Agreement, OHA must complete an MTW Annual Report highlighting specific information regarding the activities conducted during the fiscal year. OHA's MTW Annual Report provides HUD, OHA residents, and the public information on OHA programs and the MTW budget as well as an analysis of changes that occurred during the period between July 1, 2022 and June 30, 2023.

As part of the demonstration, the United States Congress established the following five statutory requirements and three statutory goals for MTW:

Statutory Requirements	Statutory Objectives
<ul style="list-style-type: none"> ➤ Assist substantially the same total number of eligible low-income families under MTW as would have been served absent the demonstration ➤ Maintain a mix of families (by family size) comparable to those they would have served without the demonstration ➤ Ensure that at least 75 percent of the families assisted are very low-income ➤ Establish a reasonable rent policy to encourage employment and self-sufficiency ➤ Assure that the housing the agencies provide meets HUD’s housing quality standards 	<ul style="list-style-type: none"> ➤ Reduce costs and achieve greater cost effectiveness in Federal expenditures; ➤ Give incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs, that assist in obtaining employment and becoming economically self-sufficient; and ➤ Increase housing choices for low-income families

In compliance with the MTW Agreement, the activities in the FY 2023 MTW Annual Report meet the statutory requirements as well as at least one or more of the statutory objectives. The Report details the overall progress staff made to fully integrate statutory requirements and strategic goals into activities to serve as many families as possible within the constraints imposed by the local market, pandemic and unexpected events.

FY 2023 Overview

Provide Sustained, Impactful and Humane Resident Services, Community Engagement and Community Safety Programs

FY 2023 brought hybrid working conditions to allow staff to interact in person with each other, and residents, while also allowing social distancing as a safety precaution. Using the techniques developed during the previous years, OHA issued extensive regular communication, resources and supports for both residents and staff as the environment and recommendations evolved, and our offices reopened to the public. Two programs created during the pandemic received Awards of Excellence from the National Association of Housing and Redevelopment Officials (NAHRO) for our responsive and effective programs to cope with COVID. The award winners were the Personal Protective Equipment (PPE) Distribution Project to provide PPE and cleaning supplies to public housing residents and our Seniors Connect Art Kit Program which provided residents with art kits, newsletters, wellness checks, and other resources delivered to homes throughout COVID.



OHA also recognized the need to increase job readiness for residents and applied for and was awarded a second Jobs Plus grant, one of only four awarded nationally. The funding of \$2.3M will assist the work-able



populations at Lockwood Gardens, one of OHA's large public housing sites in East Oakland. This development consists of 372 units, with 353 work-able individuals, where over 60% of the work-able adults have no source of income, and 17% are under-employed. This grant will be used for individualized case management to address the barriers to employment, including digital literacy, access to a computer and internet access, and transportation issues.

Sustained high standards of Customer Service for Residents and Stakeholders



Lessons learned on adaptation and quick responses were applied to new, unexpected situations that arose during the many strong storms Oakland experienced this winter. California was hit hard with rain and snow, which led to unanticipated flooding and downed trees throughout the state. During the rainy season, Oakland saw 12.3 inches of rainfall above average resulting in 30 inches compared to the typical average of 18 inches. OHA saw 25 properties impacted by storms, and staff addressed the damage quickly and ensured impacted families were safely moved to hotels or other housing, and provided meals, if necessary, while repairs

were made. Even with the extreme weather, OHA focused on overall agency priorities and objectives. These objectives were centered on: 1) Sustained high standards of customer service for residents and stakeholders; 2) Position OHA as a sustained leader in the preservation of units and expansion of affordable housing; 3) Provide sustained, impactful and humane resident services, community engagement and community safety programs; and 4) Expand board knowledge of OHA and its affiliates. The last few years have illuminated the urgency and need for permanent housing solutions for homeless individuals and families and the FY 2023 MTW Report demonstrates the effectiveness of OHA's responses during the year.

Despite extreme weather events, OHA deployed effective strategies to assist unsheltered families through partnerships with the City of Oakland, the Alameda County Health Care Services Agency, and non-profit providers. By previously expanding the Sponsor-based Housing Assistance Program (SBHAP) and the Building Bridges Key to Home initiative, OHA served 134 additional unhoused families highlighting the overall strength and impact of the local, non-traditional (LNT) MTW programs in supporting the *All In* initiative.



As a demonstration of the overwhelming demand to assist the most vulnerable



populations, OHA leased over the allocation of 515 Emergency Housing Vouchers (EHVs) to assist individuals and families experiencing or at high risk of homelessness. An interdepartmental team managed the deployment of these vouchers and OHA applied for, and was awarded, 81 Stability Vouchers (SV) designed to reach the same population. As required, OHA created a Memorandum of Understanding to replicate the innovations developed during the EHV project and plans to use the SVs

to maintain stable housing for the over-leased EHV families, allowing quick and resourceful utilization of the SVs.

HUD recognized OHA with an Award of Appreciation for teaching Best Practices on leasing EHV's to a HUD roundtable event involving PHAs nationwide. Incentives pioneered during the EHV deployment, sparked a year-long project to research, survey and build on these successful tools and expand them to other programs. These expanded incentives encouraged strong landlord partnerships and delivered much needed services and resources to families often struggling to supply and furnish a home after moving from the street. Fifty-one (51) EHV owners received capital improvement payments, totaling \$52,220, to make HQS fail related repairs through the EHV program. Additionally, EHV services fee funding was used to pay \$395,000 in sign on bonuses for owners associated with these special purpose vouchers.



The Foster Youth to Independence (FYI) initiative made Housing Choice Voucher (HCV) assistance available to PHAs in partnership with Public Child Welfare Agencies (PCWAs). Under FYI, OHA provided housing assistance on behalf of youth at least 18 years and not more than 24 years of who left foster care, or will leave foster care within 90 days, and are homeless or are at risk of becoming homeless. OHA was awarded 49 FYI vouchers in 2021, effective in March 2022, and partnered with Alameda County Social Services (ACSSA), Beyond Emancipation, and Lao Family Community Development Inc. to develop an implementation framework for this new program. Staff used the referral and application process from the EHV deployment to reduce delays, with a fully digital, single submittal process. Staff provided resources for participants, including a guide with tips for first-time renters. OHA launched the program in April 2022 and received referrals and applications from eligible families and individuals. OHA also applied MTW flexibilities to this non-MTW program as a means of supporting participants who exited the foster care system. During FY 2023, 59 applicants were accepted into the program, with 16 vouchers leased bringing the total leased at FY end to 26.



Staff used the referral and application process from the EHV deployment to reduce delays, with a fully digital, single submittal process. Staff provided resources for participants, including a guide with tips for first-time renters. OHA launched the program in April 2022 and received referrals and applications from eligible families and individuals. OHA also applied MTW flexibilities to this non-MTW program as a means of supporting participants who exited the foster care system. During FY 2023, 59 applicants were accepted into the program, with 16 vouchers leased bringing the total leased at FY end to 26.

OHA proudly hosted HUD staff twice during the FY. Deputy Assistant Secretary (DAS) of the Real Estate Assessment Center, Ashley Sheriff, visited OHA to discuss the upcoming changes to inspection protocols and the implementation of the National Standards for the Physical Inspection of Real Estate (NSPIRE) and hear feedback and ideas from not only OHA, but our neighboring Bay Area PHAs. The roundtable discussion



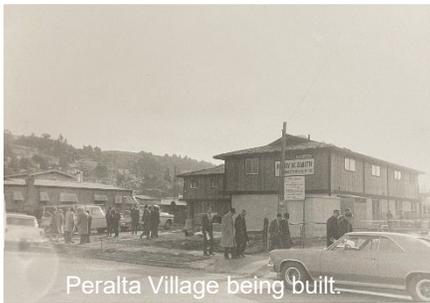
Roundtable discussion with DAS Sheriff



focused on new standards, implementation compliance, and timelines. DAS Sheriff also toured typical OHA properties affected by the new inspection standards and saw examples of improved older properties and newly developed sites. Regional Director, Marcie Vega, and our DAS, Felicia Gaither visited OHA for a quick tour to highlighting housing struggles in Oakland, as well as the long term, multi-phased

Brooklyn Basin, which is nearing completion as examples of HUD funding and committed reserves being spent effectively and judiciously to create stellar new affordable housing.

Position OHA as a Sustained Leader in the Preservation of Units and Expansion of Affordable Housing



Peralta Village being built.

OHA celebrated 85 years of service during the FY hosting many valued partners, both new and old, and while reminiscing on past accomplishments, re-doubled efforts to provide quality and affordable housing to low-income families going forward. The FY 2023 MTW Annual Report describes the strategies OHA used to fulfill its commitment to increase housing choice and affordability, and how OHA achieved a 97.8% preliminary baseline number of families served.

While it was exhilarating to review all the progress through the years in creating new housing choices for the families in Oakland since OHA was founded in 1938, staff diligently completed milestones. Brooklyn Basin Phase 3, known as Foon Lok West, achieved full lease up of the 130 new units of affordable housing and began construction on Foon Lok East, the final phase of this multi-year project adding over 3,000 new units of housing in total, 465 being affordable. OHA's pipeline of development projects yielded pre-development funding to assist 3 sites, 500 Lake Park, 285 12th Street and Mandela Station Affordable, adding a future 358 new units of housing for Oakland.



Expand Board Knowledge of OHA and its Affiliates

OHA values the many contributions and insights from its board members and strived to expand and tap into their knowledge with a strategic planning retreat at the end of the FY. OHA ensured that the board members received more comprehensive monthly reporting by creating and including easy to read departmental dashboards.



Information and data collected on the progress OHA made toward implementing 21 of the 27 approved activities are included in Section IV.

The FY 2023 MTW Annual Plan and Report, once approved, are available on OHA's website at www.oakha.org



Lobby Art at Foon Lok West

Section II. General Housing Authority Operating Information

A. Housing Stock Information

OHA's MTW housing stock is made up of a variety of housing assistance programs including vouchers, public housing, and local, non-traditional housing types. This section discusses OHA's MTW housing inventory. A comprehensive housing inventory table is available in Appendix E, which shows a complete list of OHA's MTW and non-MTW housing assistance and housing stock.

Public Housing

The public housing portfolio maintained over 97% occupancy rate overall. Oak Grove North and South is a 151-unit senior housing development comprised of two buildings, 76 units in Oak Grove North and 75 units in Oak Grove South, including a manager's unit in each. The project was converted to a tax credit partnership with 149 project-based vouchers through a HUD approved disposition. OHA completed the substantial rehabilitation of Oak Grove North and Oak Grove South in FY 2022 and successfully converted all construction financing to permanent March 2023.



Oak Grove North- New Courtyard

Harrison Towers was approved for disposition. Changes to the State of California's tax-exempt bond allocation procedures in late 2020 resulted in delays securing the tax-exempt bonds and 4% Low Income Housing Tax Credits necessary to finance the critical repairs and seismic upgrades to the building. In FY 2023, implementation of the approved Relocation Plan began; during the FY seven (7) residents were relocated from the property and an additional eight (8) resident applications were pending approval. The team continued working with the structural engineer, architect, and general contractor to conduct a deeper analysis of the seismic upgrade program to minimize impacts to residential units and achieve higher cost efficiency while maintaining the same building safety objectives. Additionally, the process to select a highly qualified joint venture partner capable of securing a tax-exempt bond and 4% Low Income Housing Tax Credit allocation in this new and highly competitive field was initiated.



Harrison Towers

OHA planned on evaluating the feasibility of converting some mixed-finance properties with public housing units to Rental Assistance Demonstration (RAD) Project Based vouchers in FY 2023, but priorities shifted during the year. RAD conversions for Lion Creek Crossings Phase I, II, III and IV are not moving forward at this time, as OHA and the project owners are instead focusing on buying out the investor limited partners. Completion of the limited partner buyouts for these developments is expected during FY 2024.

Local, Non-traditional Programs

Sponsor Based Housing Assistance Program

OHA administered existing programs and continued implementation of new local programs during the FY. Existing programs such as the Sponsor Based Housing Assistance Program (SBHAP), launched in 2010, in partnership with the City and expert providers, offered housing assistance to 1) chronically homeless individuals from encampments, 2) formerly incarcerated individuals recently released from

San Quentin prison, and 3) emancipated foster youth exiting the juvenile justice system. This program has the capacity to serve up to a maximum of 180 households per month and OHA averaged 114 households served monthly.

Parents and Children Together (PACT)

The Parents and Children Together (PACT) program evolved from a program serving primarily mothers exiting the criminal justice system to a citywide family unification program that includes any parent exiting the Santa Rita County Jail system that is enrolled in a reentry program designed and facilitated by the Alameda County Sheriff's Office (ACSO). OHA accepted referrals from the ACSO and provided service-enriched housing to facilitate reuniting parents with their children in stable and safe housing. The program has capacity to serve 20 families per month in a transitional housing environment for 18 months as participants complete the program they started while they were incarcerated. Upon successful completion, they are offered the option to transition into an available OHA managed PBV unit. In FY 2023, OHA served an average of 6 families through PACT. With the appointment of a new sheriff, and focusing on other priorities, this program has seen reduced number of referrals in FY 2023. The partnership with the ASCO was ended during the FY, and this program will have to be retooled for future use.

Building Bridges

The Building Bridges initiative, which uses partnerships with the City, Alameda County, and experienced community-based organizations to provide housing assistance to underserved populations, continued operations in FY 2023, but experienced some challenges with staff turnover and decreased utilization. This program seeks to extend and leverage existing support through systems alignment to increase the chance of sustained success and long-term positive outcomes for these families. The BB-SRO program has a capacity, when all sites are renovated and ready, to serve 311 families through a service-enriched SRO model. The shared housing and transitional housing units are reserved to house veterans, homeless and foster youth. OHA provided a monthly operating subsidy for each occupied bedroom/apartment that is based on a formula whereby OHA pays 75 percent of the rent, and the eligible resident pays up to 25 percent of the rent. OHA served 188 families per month during FY 2023.

The **BB CalWORKs** program is designed to provide local housing assistance for one to two years for Alameda County Social Services Agency (ACSSA) clients who are actively engaged in a plan to achieve self-sufficiency. Specifically, the program serves employable, formerly homeless CalWORKs clients with the goal of stabilizing the housing and improving outcomes for families and children. During FY 2023, OHA housed families referred from ACSSA. ACSSA provided wrap around case management services to address employment barriers and assisted participants with access to other necessary community resources. Upon successful program completion, program participants were referred to eligibility screening for an HCV. This program has the capacity to serve up to 50 families per month and in FY 2023, OHA averaged 9 families assisted per month. This program will need to be reevaluated for future use.

BB THP+ is a short-term program designed to extend the runway of assistance and help create a pathway to economic stability for people exiting the foster care system. OHA utilized the County of Alameda's 2017 RFP as the competitive selection process to award housing assistance funding to First Place for Youth (FPY). The award of funding resulted in an executed contract between OHA and FPY to provide rental housing assistance for low-income THP+ participants for up to five years. The service provider assists program participants through direct referral. Given that OHA can only take direct

referrals, and cannot open a waitlist for this program, OHA struggled to utilize the programs full capacity. The program capacity can serve up to 50 families per month and in FY 2023 OHA served an average of 11 families per month. Our partners encountered difficulties finding youth that meet the specific criteria for this program.

BB-Key To Home (BB-KTH) is a new program where OHA partnered with the Oakland Affordable Housing Preservation Initiative (OAHPI), Alameda County Health Care Services (HCSA) and Abode Services to provide property-based housing assistance to up to 23 families through a new local housing assistance pilot program. The program provided a coordinated exit for families with children out of Project Roomkey interim housing in to more long-term supportive housing managed by a third-party homeless service provider and property manager contracted by OAHPI to provide resident community services and property management. The program has a tiered tenant rent structure based on Area Median Income (AMI). Program participants pay a flat rent based on AMI income category and sign an annual lease. Supportive services and case management are provided by HCSA and Housing Consortium of the East Bay (HCEB). OHA plans to continue the program for a minimum of 15 years with an option to extend for 5 years, provided funding availability. The program served an average of 20 families per month during the FY, just short of the projected 23 families.

Development of New Affordable Units

During FY 2023, OHA supported the development of affordable housing stock by nonprofit developers in Oakland. In May 2022, construction was completed at Foon Lok West (Brooklyn Basin Project 3) and leasing was initiated for 130 family units, by August 2022 all new units were leased up. During FY 2023, 61% of construction was completed for Foon Lok East (Brooklyn Basin Project 4). OHA provided predevelopment funding to 500 Lake Park, a 53-unit mixed-use affordable housing development, and 285 12th Street, a planned 65-unit project. OHA approved a Term Sheet for contributions of predevelopment funding, construction and permanent financing, and Section 8 Project-Based Vouchers for Mandela Station Affordable, a 240-unit affordable housing development which is part of a transit-oriented development master plan at the West Oakland BART station.



Brooklyn Basin – Vista Estero

See appendix B for an overview of housing developed using mixed financing and low-income housing tax credits (LIHTC). Overall, OHA has developed over 2,400 units in mixed finance sites, of which 1,111 units use only LIHTC and/or no- traditional (public housing or HCV) subsidies.

Housing Choice Vouchers

The majority of OHA's housing assistance was delivered in the form of a tenant-based voucher. OHA has the capacity to serve 13,107 families through the HCV program, with about 11,262 of those families served using a traditional tenant-based or project-based subsidy. Approximately 101 of the vouchers are reserved for the Family Unification Program, 85 are reserved for the Non-Elderly Disabled (NED) program. Non-MTW vouchers are comprised of 212 vouchers for the Mainstream program, 49 vouchers are allocated for the Foster Youth to Independence (FYI) programs, 526 Veteran Affairs Supportive Housing (VASH) Vouchers, and 515 vouchers are allocated for the Emergency Housing Voucher (EHV) program. Additionally, OHA administers approximately 69 vouchers through the HCV homeownership program.

Project-Based Vouchers

In FY 2023, OHA added an additional 159 Project-Based vouchers (PBVs) through continued lease up of previously conditionally awarded units at properties under construction. In the FY 2023 plan, OHA indicated an additional 225 PBVs would be added throughout Oakland, but did not reach that goal.

OHA initially planned on submitting an application to convert the public housing units to PBVs at four mixed-finance properties through the first component of the RAD program. These sites included Lion Creek Crossing Phases 1 through 4 for a total of 157 additional PBV units. However, during the fiscal year, OHA decided to prioritize other activities and did not submit an application.

Foon Lok East, previously known as Brooklyn Basin 4, (61 units), W Grand and Brush (28 units), 7th and Campbell (39 units), and Ancora Place (31 units) completed an Agreement to enter into a Housing Assistance Payment (AHAP) at the end of FY 2023.

Friendship Senior Housing (34 units), 285 12th Street (16 units), and 3801 MLK Family Housing (16 units) did not manage to enter into a AHAP contract at the end of FY2023. Lack of tax credit, construction financing, and unavailability of local and state funding were mentioned as the mean reason for the delays.

In FY 2023, OHA did not award any new PBVs. A list of all PBV sites is included in Appendix A.

Table 1: Actual New Project-Based Vouchers

Tenant-based vouchers that the MTW PHA project-based for the first time during the Plan Year. These include only those in which at least an AHAP will be in place by the end of the Plan Year.

Property Name	Number of Vouchers Newly Project-Based		Status at End of Plan Year**	RAD?	Description of Project
	Planned*	Actual			
Foon Lok East (Previously known as Brooklyn Basin 4)	61	61	Committed	No	Brooklyn Basin is a large scale, master planned community along Oakland's waterfront that includes 3,100 units, 200,000 square feet of commercial space and 32 acres of open space. The affordable component is comprised of 465 units and will be developed by MidPen Housing Corp. in phases on two parcels acquired by the City of Oakland and OHA. MidPen will pursue five (5) affordable projects -- four for families and one for seniors. All projects will include open landscaped plazas, children's play areas (except for the senior property), community and specialized activity rooms, and on-site resident support and property management services. A total of 258 PBVs were awarded to the five projects in 2018.
3801 MLK Family Housing	16	0	Pending	No	3801 MLK will be for families and households with special needs. It will the diverse housing needs for Oakland families and households ranging from 30%-50% AMI. The project failed to enter into AHAP in FY2023 due to unavailability of funding, construction financing, and tax credit.
W Grand and Bush	28	28	Committed	No	West Grand and Brush involves new construction of 59 units. 28 of these units will be PBV units. The project will provide supportive services including referrals to community resources and benefits, case

					management, parenting training, life skills training, financial planning, job counseling, conflict resolution, mental health services, and individual and group substance abuse recovery.
7 th and Campbell	39	39	Committed	No	7 th and Campbell involves new construction of 79 units. 39 of these units will be PBV units. The project will provide supportive services through partnership with Building Opportunities for Self Sufficiency (BOSS). Residents will have access to essential supportive services, including: Employment & OJT placement/training; Education assistance/benefits information; Financial counseling/debt counseling; Childcare assistance; Legal and Family law services; Life skills/soft skills; Therapy; Domestic violence counseling; and Food bank/meal support services.
Ancora Place	31	31	Committed	No	Ancora Place is a 77-unit family project located at 2227-2257 International Blvd. This development will bring a beautiful mid-block building to the San Antonio neighborhood in Oakland. The proposed building will be five stories and include a community room, services office, on-site manager, 5th floor event space, common laundry room and a beautiful courtyard that will be enjoyed by residents. Ancora has received funding from the City of Oakland's voter approved, Measure KK for improved infrastructure and affordable housing.
Friendship Senior Housing	34	0	Pending	No	Friendship Senior Housing is 100 percent senior housing development targeting homeless and veterans at 30 percent Area Median Income or below. CHDC will partner with Adobe Services and East Bay innovations to provide case management services. The project failed to enter into AHAP in FY 2023 due to unavailability of funding, construction financing, and tax credit.
285 12 th Street	16	0	Pending	No	A new partnership deal with EBALDC that was in the pre-development phase. This project entails construction of a new 65-unit affordable housing building with 3,500 square feet of commercial space on a former parking lot at 12 th and Harrison St. in downtown Oakland. The project failed to enter into AHAP in FY 2023 due to unavailability of funding, construction financing, and tax credit.
Lion Creek Crossing 1-4	157	0	Pending	Yes	The Lion Creek Crossings project is a multi-phased development with 157 of public housing that planned to be converted to PBV units through RAD in East Oakland for low-income families. OHA did not seek to convert this project to RAD in FY 2023.

382

159

Planned/Actual Total Vouchers Newly Project-Based

* Figures in the "Planned" column should match the corresponding Annual MTW Plan.

** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

Please describe differences between the Planned and Actual Number of Vouchers Newly Project-Based:

A number of projects did not go under AHAP contract in FY 2023 as projected, leading to less actual Project Based Vouchers. They were delayed due to unavailability of funding, construction financing, and tax credits. OHA did not seek to convert Lions Creek Crossing, sites 1-4, to RAD during the FY.

Table 2: Actual Existing Project-Based Vouchers

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP was already in place by the beginning of the Plan Year. This includes those in which a HAP was in place at the beginning of the plan year also.

Property Name	Number of Vouchers Newly Project-Based		Status at End of Plan Year**	RAD?	Description of Project
	Planned*	Actual			
Mandela Gateway	30	30	Leased/Issued	No	An affordable housing project of 187 units in West Oakland for low-income families. The project was leased up in 2004 with 30 PBV units.
Altenheim Senior Housing Phase I	23	23	Leased/Issued	No	The first phase of Altenheim Senior Housing project in Dimond district of Oakland with 93 units for low-income seniors. The project was leased up in 2007 with 23 PBV units.
Lion Creek Crossings II	18	18	Leased/Issued	No	The second phase of Lion Creek Crossings project with 146 units in East Oakland for low-income families. The project was leased up in 2007 with 18 PBV units.
Madison Apartments	50	50	Leased/Issued	No	An affordable housing project of 79 units near downtown Oakland for low-income families. The project was leased up in 2008 with 19 PBV units.
Lion Creek Crossing III	16	16	Leased/Issued	No	The 3 rd phase of Lion Creek Crossings project with 106 units in East Oakland for low-income families. This phase was leased up in 2008 with 16 PBV units.
Seven Directions	28	28	Leased/Issued	No	An affordable housing project of 36 units in East Oakland for low-income families. The project was leased up in 2008 with 18 PBV units.
Orchards on Foothill	64	64	Leased/Issued	No	An affordable housing project of 65 units in Lower San Antonio district of Oakland for low-income seniors. The project was leased up in 2008 with 64 PBV units.
Fox Court Apt.	33	33	Leased/Issued	No	An affordable housing project of 80 units in downtown Oakland for low-income /homeless with HIV/AIDS families. The project was leased up in 2009 with 20 PBV units.
Jack London Gateway	60	60	Leased/Issued	No	An affordable housing project of 60 units in West Oakland for low-income seniors. The project was leased up in 2009 with 60 PBV units.
14 th St at Central Station	20	20	Leased/Issued	No	An affordable housing project of 99 units in West Oakland for low-income families. The project was leased up in 2007 with 20 PBV units.
Tassafaronga Village Phase I	80	80	Leased/Issued	No	The first phase of Tassafaronga Village project with 137 units in East Oakland for low-income families. The project was leased up in 2010 with 80 PBV units.

Alteheim Senior Housing Phase II	40	40	Leased/Issued	No	The second and final phase of Altenheim Senior Housing project with 81 units for low-income seniors. This phase was leased up in 2010 with 40 PBV units.
Fairmount Apartments	16	16	Leased/Issued	No	An affordable housing project of 31 units in Grand Lake area of Oakland for low-income families and persons with disability. The project was leased up in 2010 with 16 PBV units.
Tassafaronga Village Phase II	19	19	Leased/Issued	No	The second and final phase of Tassafaronga project with 20 units for low-income/homeless with HIV/AIDS families. The project was leased up in 2010 with 19 PBV units.
Harp Plaza	19	19	Leased/Issued	No	An affordable housing project of 19 units in Eastmont district of Oakland for low-income families. The project was leased up in 2010.
Effie's House	10	10	Leased/Issued	No	An affordable housing project of 21 units in Lower San Antonio district of Oakland for low-income families. The project was leased up in 2010.
Drachma Housing	25	25	Leased/Issued	No	A scattered-site affordable housing project of 14 units in West Oakland for low-income families. The project was leased up in 2010.
Foothill Family Partners	11	11	Leased/Issued	No	An affordable housing project of 65 units in Bancroft district of Oakland for low-income families. The project was leased up in 2011.
St. Joseph's Senior Apts	83	83	Leased/Issued	No	An affordable housing project of 84 units in Fruitvale district of Oakland for low-income seniors. The project was leased up in 2011 with 83 PBV units.
OHA Scattered Sites (OAHPI)	1,539	1,539	Committed	No	It is a scattered site public housing disposition project involving 1,539 units for low-income families. The project was assisted with PBV subsidies since 2010.
Lion Creek Crossings IV	10	10	Leased/Issued	No	The 4 th phase of Lion Creek Crossings project of 72 units in East Oakland for low-income families. The project was leased up in 2012 with 10 PBV units.
Savoy Phase 1	55	55	Leased/Issued	No	The first phase of the Savoy project of 101 units in downtown Oakland for individuals with special needs. The project was leased up in 2012.
Hugh Taylor House	35	35	Leased/Issued	No	An affordable housing project of 43 units in East Oakland for low-income families. The project was leased up in 2012.
Madison Park Apartments	96	96	Leased/Issued	No	An affordable housing project of 98 units near downtown Oakland for low-income seniors. The project was leased up in 2012.
Merritt Crossing Apts (6 th and Oak)	50	50	Leased/Issued	No	An affordable housing project of 70 units near Chinatown Oakland for low-income seniors. The project was leased up in 2012 with 50 PBV units.

720 E 11 th Street Apts (aka Clinton Commons)	16	16	Leased/Issued	No	An affordable housing project of 55 units in Eastlake district of Oakland for low-income/homeless with HIV/AIDS families. The project was leased up in 2012 with 16 PBV units.
Harrison Street Senior Housing	11	11	Leased/Issued	No	An affordable housing project of 73 units near downtown Oakland for low-income seniors. The project was leased up in 2012 with 11 PBV units.
Kenneth Henry Court	13	13	Leased/Issued	No	An affordable housing project of 51 units in the Bancroft district of Oakland for low-income families. The project was leased up in 2013.
California Hotel Phases 1 and 2	88	88	Leased/Issued	No	The first and second phase of California Hotel project of 137 units for families of low-income/special needs/homeless/HIV/AIDS. The phase was leased up in 2013 with 88 PBV units.
James Lee Court	12	12	Leased/Issued	No	An affordable housing project of 26 units for low-income families. The project was leased up in 2013.
Savoy Phase 2	46	46	Leased/Issued	No	The 2 nd phase of the Savoy project of 101 units at downtown Oakland for special needs/homeless/HIV/AIDS individuals. This phase was leased up in 2013.
Slim Jenkins Court	11	11	Leased/Issued	No	An affordable housing project of 32 units in West Oakland for low-income families. The project was leased up in 2013 with 11 PBV units.
Oak Point Limited (OPLP)	15	15	Leased/Issued	No	A scattered-site affordable housing project of 31 units in West Oakland for low-income families. The project was leased up in 2013 with 15 PBV units.
Drasnin Manor	25	25	Leased/Issued	No	An affordable housing project of 26 units in East Oakland for low-income families. The project was leased up in 2013 with 25 PBV units.
St. Joseph's Family Apts	15	15	Leased/Issued	No	An affordable housing project of 62 units in Fruitvale district of Oakland for low-income families. The project was leased up in 2013 with 15 PBV units.
MacArthur Apts	14	14	Leased/Issued	No	An affordable housing project of 32 units in the Lower Hills district of Oakland for low-income families. The project was leased up in 2013 with 14 PBV units.
California Hotel Phase 3	47	47	Leased/Issued	No	The third and final phase of California Hotel project of 137 units for low-income/special needs/homeless/HIV/AIDS families. This phase was leased up in 2013 with 47 PBV units.
Lion Creek Crossings V	127	127	Leased/Issued	No	The fifth phase of Lion Creek Crossings project of 128 units in East Oakland for low-income seniors. The project was leased up in 2014 with 127 PBV units.
Cathedral Gardens	43	43	Leased/Issued	No	An affordable housing project of 100 units in Uptown district of Oakland for low-income families. The project was leased up in 2014 with 43 PBV units.

Lakeside Senior Apartments	91	91	Leased/Issued	No	An affordable housing project of 92 units on the banks of Lake Merritt in Oakland for low-income seniors. The project was leased up in 2015 with 91 PBV units.
Marcus Garvey Commons	10	10	Leased/Issued	No	An affordable housing project of 22 units in West Oakland for low-income families. The project was leased up in 2015 with 10 PBV units.
1701 Martin Luther King Jr. Way	25	25	Leased/Issued	No	An affordable housing project of 26 units near downtown Oakland for low-income/special needs/homeless/HIV/AIDS families. The project was leased up in 2015 with 25 PBV units.
MURAL aka MacArthur Transit Village	22	22	Leased/Issued	No	An affordable housing project of 90 units in West Oakland for low-income families. The project was leased up in 2016 with 22 PBV units.
AveVista aka 460 Grand	34	34	Leased/Issued	No	An affordable housing project of 68 units in Lake Merritt area of Oakland for low-income families. The project was leased up in 2016 with 34 PBV units.
11 th and Jackson (Prosperity Place)	35	35	Leased/Issued	No	An affordable housing project of 71 units in Chinatown Oakland for low-income families. The project was leased up in 2017 with 35 PBV units.
Civic Center TOD	20	20	Leased/Issued	No	An affordable housing project of 40 units in downtown Oakland for low-income/special needs/homeless families. An AHAP for 10 PBV was executed in 2016.
Redwood Hill Townhomes	27	27	Leased/Issued	No	An affordable housing project of 28 units in Laurel district of Oakland for low-income/special needs families. An AHAP for 11 PBV was executed in 2017.
3706 San Pablo Avenue	20	20	Leased/Issued	No	An affordable housing project of 87 units on the cities' border of Oakland and Emeryville for low-income families. An AHAP for 20 PBV was executed in 2017.
Embark Apartments	61	61	Leased/Issued	No	An affordable housing project of 40 units in North Oakland for low-income/veteran/VASH families. An AHAP for 61 PBV was executed in 2017.
Northgate Apartments	14	14	Leased/Issued	No	The project, located at 2301 Northgate Avenue, serves low-income families. It is a 5-story 41-unit building completed in 2003. Local schools, public transit, grocery stores, parks are all within half a mile of the property. Resident services are not available on-site, but residents have access to RCD's resident services programs. The 14 PBV subsidies will be attached to 8 two-bedrooms and 6 three-bedrooms.

Westlake Christian Terrace West (WCTW)	121	121	Leased/Issued	No	Westlake Christian Terrace West is one of the 15 Oakland properties that provides permanent affordable housing to elderly seniors. Originally built in 1978 using HUD Section 236 insured financing, the property is located in downtown Oakland at 275 28 th Street along the Broadway – Valdez corridor. With a total of 198 one-bedroom units and two manager units, the project provides residents with full kitchens and bathrooms, a community room, laundry room, property management and social services offices and parking.
Paseo Estero and Vista Estero (formerly known as Brooklyn Basin 1 and 2)	132	132	Leased/Issued	No	Brooklyn Basin is a large scale, master planned community along Oakland's waterfront that includes 3,100 units, 200,000 square feet of commercial space and 32 acres of open space. The affordable component is comprised of 465 units and will be developed by MidPen Housing Corp. in phases on two parcels acquired by the City of Oakland and OHA. MidPen will pursue five (5) affordable projects—four for families and one for seniors. All projects will include open landscaped plazas, children's play areas (except for the senior property), community and specialized activity rooms, and on-site resident support and property management services. A total of 258 PBVs were awarded to the five projects in 2018.
Empyrean	32	32	Leased/Issued	No	The Empyrean is a 99 unit severely distressed Single-room Occupancy hotel in downtown Oakland which will be converted into 66 affordable studio and 1-bedroom apartments. Leased in Jan. 2019.
Camino 23	26	26	Leased/Issued	No	An affordable housing project of 32 units in East Oakland for low-income/special need families. An AHAP was executed in 2018 for 26 PBVs.
Oak Groves – North and South	152	152	Leased/Issued	No	Two residential buildings in downtown Oakland with 152 units of senior housing, 77 units in Oak Grove South and 75 units in Oak Grove North. Both were built in the early 1980s.
Rosa Park	11	11	Leased/Issued	No	An affordable housing project of 12 units in Uptown district of Oakland for low-income/homeless families. The project was leased up in 2017 with 5 PBV units.
Adeline St. Lofts	20	20	Leased/Issued	No	An affordable housing project of 79 units in West Oakland for low-income families. The project was leased up in 2018 with 8 PBV units.
Stanley Ave. Lofts	13	13	Leased/Issued	No	An affordable housing project of 24 units in East Oakland for low-income families. The project was leased up in 2018 with 13 PBV units.
Swan Market	10	10	Leased/Issued	No	An affordable housing project of 18 units at downtown Oakland for low-income/special need families. The project was leased up in 2017 with 4 PBV units.

Oak Park Apartments	10	10	Leased/Issued	No	An affordable housing project of 35 units in Fruitvale district of Oakland for low-income families. The project was leased up in 2017 with 3 PBV units.
Hisman Hin-Nu Apartments	10	10	Leased/Issued	No	An affordable housing project of 92 units in Fruitvale district of Oakland for low-income families. The project was leased up in 2017 with 7 PBV units.
San Pablo Hotel	31	31	Leased/Issued	No	An affordable housing project of 143 units near downtown Oakland for low-income seniors. The project was leased up in 2018 with 27 PBV units.
Ambassador Apts	10	10	Leased/Issued	No	An affordable housing project of 69 units at 3610 Peralta Avenue in Oakland for low-income families. The project was leased up in 2017 with 10 PBV units.
Acts Cyrene (94 th and International	14	14	Leased/Issued	No	An affordable housing project of 59 units in East Oakland for low-income families. The project was leased up in 2017 with 14 PBV units.
Hamilton Apartments	92	92	Leased/Issued	No	The Hamilton Apartments is located at 510 21 st Street in Oakland. The Project was awarded 92 Section 8 Project-Based Vouchers for 92 studios units serving low-income adults.
International Blvd. Apartments	18	18	Leased/Issued	No	The project, located at 6600 International Blvd. and 1406 Seminary Avenue, serves individuals and families with disabilities. It is an affordable 30-unit housing development that is within close proximity to public transit. The 18 PBV subsidies will be attached to 6 one-bedrooms, 9 two-bedrooms, and 3 three-bedrooms. Resident services are not available on-site, but residents have access to RCD's resident services programs.
Fruitvale Transit Village – Phase IIA	66	66	Leased/Issued	No	An affordable housing project of 94 units in Fruitvale district of Oakland for low-income/VASH families. An AHAP for 66 PBV was executed in 2017.
Courtyards at Acorn	27	27	Leased/Issued	No	An affordable housing project as part of RFQ16-008 with the objective to preserve units and prevent displacement within Oakland. HAP executed in January 2020
The Town Center	50	50	Leased/Issued	No	An affordable housing project as part of RFQ16-008 with the objective to preserve units and prevent displacement within Oakland. HAP executed in January 2020
Bishop Roy C. Nicholas	16	16	Leased/Issued	No	This project is part of the RFQ16-008. The project provides safe and affordable housing to very low and extremely low-income senior households. The project is centrally located within close proximity to retail services, hospital facilities, public transportation, and parks.
3268 San Pablo	50	50	Leased/Issued	No	New construction of a 5-story apartment building with 50 units affordable to low-income seniors (aged 62+). The project is at 100% supportive housing development. The project will demolish an existing building and parking to that occupy the site.

Nova Apartments	56	56	Leased/Issued	No	New construction of 56 affordable units. The project is 100% supportive housing development for extremely low-income at 20% AMI or below and chronically homeless individuals. The project owner will partner with Lifelong Medical Care to provide on-site supportive services.
Aurora Apartments	43	43	Leased/Issued	No	New construction of 43 affordable units which will replace a vacant 1,000 sqft industrial building. The project includes permanent supportive housing for individual's currently experiencing homelessness.
Coliseum Place	37	37	Leased/Issued	No	An affordable housing project with 37 PBV which will be attached to 9 units for households who are homeless or at for homelessness, 6 units for HOPWA eligible households, and 22 units for low-income families.
Oak Street Apartments	25	25	Leased/Issued	No	An affordable housing project as part of RFQ16-008 with the objective to preserve units and prevent displacement within Oakland. The project will serve low-income seniors in particular.
Eastside Arts and Housing	10	10	Leased/Issued	No	An affordable housing project as part of RFQ16-008 with the objective to preserve units and prevent displacement within Oakland
Sylvester Rutledge Manor	64	64	Leased/Issued	No	This project is part of the RFQ16-008. The project provides safe and affordable housing to very low and extremely low-income senior households. The project is centrally located within close proximity to retail services, hospital facilities, public transportation, and parks.
Fruitvale Studios	12	12	Leased/Issued	No	Fruitvale Studios is the rehabilitation of 24 studios in an enriched service environment. The PBV-subsidy will be provided to 12 units set aside for low-income residents.
Fon Lok West (formerly known as Brooklyn Basin 3)	65	65	Leased/Issued	No	Brooklyn Basin is a large scale, master planned community along Oakland's waterfront that includes 3,100 units, 200,000 square feet of commercial space and 32 acres of open space. The affordable component is comprised of 465 units and will be developed by MidPen Housing Corp. in phases on two parcels acquired by the City of Oakland and OHA. MidPen will pursue five (5) affordable projects – four for families and one for seniors. All projects will include open landscaped plazas, children's play areas (except for the senior property), community and specialized activity rooms, and on-site resident support and property management services. A total of 258 PBVs were awarded to the five projects in 2018.
95th and International	27	27	Committed	No	The Project is the second phase of the previously completed 94th and International project located across the street. This development is important to the continued revitalization and preservation of affordable housing in East Oakland.

Kenneth Henry Court (add'l units under RFQ16-008)	15	15	Lease/Issued	No	An affordable housing project of 51 units in the Bancroft district of Oakland for low-income families. The project was leased up in 2013.
Fruitvale Transit Village - Phase IIB	75	75	Committed	No	Fruitvale Transit Village Phase IIB, a new construction of 94 affordable units, is the third development in the Fruitvale Transit Village, immediately adjacent to the BART station in Oakland's Fruitvale neighborhood.
Foon Lok East (formerly known as Brooklyn Basin 4)	0	61	Committed	No	Brooklyn Basin is a large scale, master planned community along Oakland's waterfront that includes 3,100 units, 200,000 square feet of commercial space and 32 acres of open space. The affordable component is comprised of 465 units and will be developed by MidPen Housing Corp. in phases on two parcels acquired by the City of Oakland and OHA. MidPen will pursue five (5) affordable projects -- four for families and one for seniors. All projects will include open landscaped plazas, children's play areas (except for the senior property), community and specialized activity rooms, and on-site resident support and property management services. A total of 258 PBVs were awarded to the five projects in 2018.
7th and Campbell	0	39	Committed	No	7th and Campbell involves new construction of 79 units. 39 of these units will be PBV units. The project will provide supportive services through partnership with Building Opportunities for Self Sufficiency (BOSS). Residents will have access to essential supportive services, including Employment & OJT placement/training; Education assistance/benefits information; Financial counseling/debt counseling; Childcare assistance; Legal and Family law services; Life skills/soft skills; Therapy; Domestic violence counseling; and Food bank/meal support services.
West Grand and Brush	0	28	Committed	No	West Grand and Brush involves new construction of 59 units. 28 of these units will be PBV units. The project will provide supportive services including referrals to community resources and benefits, case management, parenting training, life skills training, financial planning, job counseling, conflict resolution, mental health services, and individual and group substance abuse recovery.
Ancora Place	0	31	Committed	No	Ancora Place is a 77-unit family project located at 2227-2257 International Blvd. This development will bring a beautiful mid-block building to the San Antonio neighborhood in Oakland. The proposed building will be five stories and include a community room, services office, on-site manager, 5th floor event space, common laundry room and a beautiful courtyard that will be enjoyed by residents. Ancora has received funding from the City of Oakland's voter approved, Measure KK for improved infrastructure and affordable housing.

4612

4771

Planned/Actual Total Vouchers Newly Project-Based

* Figures in the “Planned” column should match the corresponding Annual MTW Plan.

** Select “Status at the End of Plan Year” from: Committed, Leased/Issued

Please describe differences between the Planned and Actual Number of Vouchers Newly Project-Based:

In FY 2023, OHA added an additional 159 Project-Based vouchers (PBVs) through continued lease up of previously conditionally awarded units at properties under construction. In the FY 2023 plan, OHA indicated an additional 225 PBVs would be added throughout Oakland but did not reach that goal.

OHA initially planned on submitting an application to convert the public housing units to PBVs at four mixed-finance properties through the first component of the RAD program. These sites included Lion Creek Crossing Phases 1 through 4 for a total of 157 additional PBV units. However, during the fiscal year, OHA decided to prioritize other activities and did not submit an application.

Foon Lok East, previously known as Brooklyn Basin 4, (61 units), W Grand and Brush (28 units), 7th and Campbell (39 units), and Ancora Place (31 units) completed an Agreement to enter into a Housing Assistance Payment (AHAP) at the end of FY 2023.

Friendship Senior Housing (34 units), 285 12th Street (16 units), and 3801 MLK Family Housing (16 units) did not manage to enter into at a AHAP contract at the end of FY2023. Lack of tax credit, construction financing, and unavailability of local and state funding were mentioned as the mean reason for the delays.

In FY 2023, OHA did not award any new PBVs. A list of all PBV sites is included in Appendix A.

Other Changes to the Housing Stock that Occurred During the Fiscal Year

During FY 2023, OHA supported the development of affordable housing stock by other developers in Oakland. At Brooklyn Basin, 100% occupancy was maintained for Projects 1 and 2 (Paseo Estero and Vista Estero) adding 211 affordable units, 132 of which are assisted with PBV subsidy. In May 2022, construction was completed for Project 3, adding 130 units for families and formerly homeless households at Foon Lok West, by August 2022, 100% occupancy was achieved. Construction began on Project 4, 124 units for families and formerly homeless households at Foon Lok East, at the end of the last FY (June 2022) and has achieved 61% completion during the FY.

OHA provided predevelopment funding to 500 Lake Park, a 53-unit mixed-use affordable housing development, and 285 12th Street, a planned 65-unit project. OHA approved a Term Sheet for contributions of predevelopment funding, construction, and permanent financing, and Section 8 Project-Based Vouchers for Mandela Station Affordable, a 240-unit affordable housing development which is part of a transit-oriented development master plan at the West Oakland BART station.

Table 3: Actual Other Changes to the MTW Housing Stock In the Plan Year

Examples of the types of other changes can include (but are not limited to): Units held off-line due to relocation or substantial rehabilitation, local non-traditional units to be acquired/developed, etcetera.

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General Description of Actual Capital Expenditures during the Plan Year

OHA included the Capital Fund Program (CFP) funds in its MTW Block Grant. In FY 2023, OHA expended \$7.3 million of MTW funds on capital expenditures. These expenditures included improvements at public housing sites and administration buildings, funding for the development of new affordable housing, and purchases of software and computer network equipment.

Public housing sites receiving capital expenditures in FY 2023 included Campbell Village, Lockwood Gardens and Peralta Village. Major repairs were made to the exterior of Campbell Village and rehabilitation and modernization projects were completed at Lockwood Gardens and Peralta Village.

OHA expended MTW funds for predevelopment expenses at 500 Lake Park in the amount of \$481,479 in FY 2023. The 500 Lake Park Project, in partnership with EAH Housing, is planned to include 53 units for low-income families, of which 14 units will receive VASH subsidies, and 3,000 square feet of ground floor commercial space.

OHA expended MTW funds to advance the 285 12th Street development which, in partnership with the East Bay Asian Local Development Corporation, will include 65 new affordable units for low-income families and 3,500 square feet of ground floor commercial space. OHA closed on a bridge loan and disbursed \$251,046 predevelopment funding in FY 2023.



Oak Grove North

OHA closed construction financing and formally removed the Oak Grove North and South units from the public housing program in December 2019. As of June 30, 2022, both Oak Grove North and Oak Grove South achieved 100% construction completion and successfully converted all construction financing to permanent in March 2023. Staff are working towards the project's final 8609 Placed in Service approval.

OHA expended \$370,724 in FY 2023 to continue predevelopment work on Harrison Tower, a current 101-unit senior public housing site that was approved for disposition along with Oak Groves on July 5, 2018. OHA plans to utilize tax exempt bond financing and 4% Low Income Housing Tax credits to substantially rehabilitate and retrofit Harrison Tower. Construction closing is projected to be Spring 2025.

OHA expended \$22,900 in FY 2023 to begin the process of updating the architectural and financial feasibility analyses of 15th & Harrison. This is currently an OHA-owned parking lot, that will potentially become a partnership project in the future.

OHA expended \$205,143 for option payments and due diligence costs for the prospective site acquisition at 1600 Harrison Street. This is a prospective new acquisition of a vacant commercial building that planned to be demolished for a new construction affordable residential project.

On January 20, 2023, OHA purchased the Investor Limited Partners' interest in Lion Creek II, a 146-unit HOPE VI development, for \$1,000 thus assuming ownership of the ILP's 99.99% ownership share of the limited partnership, Lion Way Housing Partners, L.P.

Table 4: General Description of All Actual Capital Expenditures During the Plan Year

Narrative general description of all capital expenditures of MTW funds during the Plan Year.

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B. Leasing Information

Actual Number of Households Served

Throughout the last FY, the rental market in Oakland has demonstrated relative stability compared to other major cities in America. Approximately 59 percent of housing units are occupied by renters. While rent prices remain notably high in the Bay Area, Oakland ranks 35th most expensive large city in the United States. However, median rent has experienced a modest decline of 5.8% during the FY.

According to Apartment List¹, the median rent for a one-bedroom unit was \$1,479 in June 2023, whereas the national average was \$1,175. Compared to national averages, Oakland's rents are 17.5% more expensive than the national average. Additionally, the average rent for a 2 bedroom in Oakland slightly decreased by 3.6% during the FY, dropping from \$2,850 July 2, 2022 to \$2,747 on July 1, 2023. Despite this decline, Oakland's rental market remains dynamic, presenting ongoing challenges for voucher holders seeking accommodations. A continuation of the declining rent, coupled with implementation of the MTW Flexibility to use 150% of the payment standard established by the Exception Payment Standards Hubs, could enhance the competitiveness of residents in the Oakland rental market. This could be especially beneficial in hubs with low voucher presence and low

¹<https://www.apartmentlist.com/rent-report/ca/oakland>

concentrations of poverty, although the planned implementation of the Exception Payment Standards did not proceed as anticipated during the FY.

Rents have slightly declined but the population of unhoused people in Oakland is extremely high, and homelessness ranks as the most urgent issue the city needs to address for residents.² Since 2015, the homeless population has increased by 131%, and with over 5,000 individuals, both sheltered and unsheltered, Oakland accounts for half of the homeless population in Alameda County. According to the latest Point in Time count, the number of people grew, the growth rate of Oakland's homeless population has slowed. The growth rate during 2017-2019 was 47%, compared to 24% during the years 2019-2022. This could be in part due to the homeless prevention measures put into place during the pandemic, including the rental assistance programs and local eviction moratoriums to prevent evictions due to COVID related financial burdens. The City's emergency eviction moratorium remained in place through the FY and prevented most evictions in Oakland. OHA saw a modest decrease in HCV utilization, OHA implemented multiple strategies using local non-traditional programs and PBV strategies discussed in Section II.A. to bolster utilization during the program year.

BAY AREA / EAST BAY

Oaklanders say homelessness is the most urgent issue facing the city

 Sarah Ravani

March 3, 2023 | Updated: March 3, 2023 7:36 p.m.




OHA successfully served approximately 95 percent of the number of families possible through all MTW programs, marking a slight decrease from the previous years where OHA achieved 100 percent served. The projected number of households served was 14,518, while OHA ultimately served 13,831 families. Reasons for the decrease include a decline in families served through local, non-traditional programs, and a slight decrease in number of families served in the HCV program. The actual leasing outcomes and the number of families served by each program detailed below demonstrate OHA's focus on employing traditional tools as well as its commitment to developing new strategies to maximize the families served.

Public Housing

Both OHA-managed public housing sites as well as those managed by third-party property management companies maintained adequate leasing levels. Across the 13 sites, OHA maintained a 97.05 percent occupancy rate. Of the total number of units available, the public housing program served an average of 1,336 families in them each month. This is slightly below the number projected in the Plan because units are purposely being held vacant and designated as demo/dispo units to complete the Harrison Tower disposition. Even though the state COVID emergency was terminated in February of 2023, COVID impacted staff's ability to work without interruptions due to the internal protocols for isolation. COVID also resulted in applicants' ability to respond to the interview invitations in a timely manner, thus impacting the leasing time, and ultimately, the occupancy at public housing sites.

Local, Non-traditional

OHA continued partnerships with developers and successfully completed construction on Project 3, called Foon Lok West, at Brooklyn Basin in FY 2022, adding 130 affordable units. PBV subsidies

² <https://www.sfchronicle.com/eastbay/article/oakland-homelessness-survey-priority-17816397.php>

assisted 65 units, and non-traditional subsidies assisted 64 units. In FY 2023, OHA leased up the final 48, newly constructed, Local Non-Traditional (LNT) units that were not leased in FY 2022.

Participation in OHA local, non-traditional programs (both tenant-based and property-based) increased overall but saw a decline in utilization in some programs. The number of participants in the Local Housing Assistance Program (LHAP), a tenant-based program which allowed tenants to remain housed that would not meet PBV eligibility standards after disposition due to income restrictions, decreased to 10 families served monthly as participant families elected to move with tenant-based vouchers.

The Sponsor-based Housing Assistance Program (SBHAP) maintained relatively steady participation with low turnover rates, but non-profit service providers reported struggles to find new landlords willing to participate in the program due to the volume of qualified, unsubsidized applicants in the market. The average monthly number of families served was 114, a 25% increase from last FY. Staff turnover and retention proved to be a challenge with partners, and while families served increased OHA was unable to meet the 140-family projected benchmark.

Through the BBSRO program, OHA executed contracts with qualified owners, property managers, and developers in Oakland and provided operating subsidies for in-place service-enriched, single-room occupancy (SRO) units, shared housing and transitional housing units set aside for veterans, foster youth, or other special needs populations. The tenant-based component of BBSRO, served an average of 150 families and the difference in planned versus actual for tenant-based was due primarily to fewer families served in BBSRO than anticipated as the program continued to work through administrative challenges.

The BB-Shared and Transitional program serves similar, high need populations as BBSRO but allows participants to share and transition out of the program. Due to various challenges related to staff turnover, partner challenges related to COVID and administrative issues, the program served 38 families in FY 2023, which was less than projected, but more than last year.

During the FY, OHA struggled to maintain the number families enrolled through BB-THP+ and served an average of 11 families monthly, falling below the target benchmark of 25 families. The program suffered from recurring HQS fails and delays in inspections due to COVID and landlords being unwilling to make repairs to remain in the program, but instead preferring to rent to unassisted tenants. Additionally, the partners had trouble finding youth to meet the specific criteria of this program and staff turnover affected the number of referrals.

OHA projected to serve approximately 35 families per month in FY 2023 through the Building Bridges-CalWORKs program and successfully served an average of 9 families monthly. Challenges to achieving the projected goals were long eligibility screening times and the requirement that participants must stay employed to remain in the program, as some were affected by COVID related layoffs. Using direct referrals led to challenges, as partners struggled to send us an adequate number of referrals. In July 2022, CalWORKs served 19 families and by June 2023, only 10 families were served. Additional partners may need to be contracted in the future to increase utilization of these programs.

The site-based family unification/re-entry program PACT served on average 6 families, lower than the 13 families projected at the beginning of the year. Complications with the partners has led to the decline in families served.

The Homekey partnership, described in the plan and in activities #11-03 and #10-06, were not able to be utilized during this FY for a number of reasons. OHA anticipated three sites, including Coliseum Way, Piedmont Place, and the Phoenix to begin construction during the FY. Piedmont Place did not finalize a partnership with OHA, the Phoenix did not receive Homekey funding. Coliseum Way is still in the pipeline but has not broken ground due to permitting delays. OHA anticipated serving around 180 families with this program during the FY but was unable to meet this goal due to unforeseen delays.

Building Bridges Key to Home, launched during FY 2021, and projected to serve 23 families during FY 2023. OHA successfully served an average of 20 families monthly during FY 2023, falling short of the benchmark.

Overall, projected families served for tenant-based local non-traditional programs was 201 and OHA fell short of this projection and served approximately 164 families, mainly due to shortfalls in the CalWORKS and THP+ programs.

Housing Choice Voucher

During the reporting year, OHA worked diligently to maintain voucher utilization using traditional and MTW related strategies. OHA absorbed all port-in vouchers, and extended search times for voucher holders struggling to find units in the Housing Choice Voucher program and OHA used the portability restriction activity to limit ports to adjacent communities. Resources were dedicated to coaching participants on being good prospective tenants and how to prepare competitive applications, security deposit assistance was available for voucher holders. While voucher utilization remained a priority, OHA faced challenges with staffing that impacted the leasing of vouchers. OHA was able to serve 11,262 households in the MTW Housing Choice Vouchers program, not meeting the target of 11,419 households.

To address this decline, OHA continued marketing and rollout of existing owner incentives to retain and recruit new owners and improve utilization. OHA saw increased utilization of owner incentive payments, with 278 new landlords recruited (a 13% increase from the prior year). Over a million dollars was paid out in \$1,000 leasing bonuses, 1,038 bonuses paid out over all programs, and 548 bonuses specifically to MTW owners, no new contracts signed via pre-inspections due to shifted priorities to preform regular inspections during the COVID-19 pandemic and 128 owners receiving the benefit of vacancy loss payments. Owner recognition, education and other services were resumed during the FY as pandemic related restrictions were lifted, in person utilization of these services slowly increased throughout the FY. The incentives are discussed in Section IV, Activity #17-01. With the award and acceptance of new Stability Vouchers (SVs) in April, OHA plans use the successful techniques used for Emergency Housing Vouchers (EHVs) to achieve lease up quickly for SVs.

Project-based Voucher

In FY 2023, OHA added an additional 159 Project-Based vouchers (PBVs) through continued lease up of previously conditionally awarded units at properties under construction.

OHA initially planned on submitting an application to convert the public housing units to PBVs at four mixed-finance properties through the first component of the RAD program. These sites included Lion Creek Crossing Phases 1 through 4 for a total of 157 additional PBV units. However, during the fiscal year, OHA decided to prioritize other activities and did not submit an application.

In the FY 2023 plan, OHA indicated an additional 225 PBVs will be added throughout Oakland. However, OHA only added 159 PBV units during FY 2023.

Foon Lok East, previously known as Brooklyn Basin 4, (61 units), W Grand and Brush (28 units), 7th and Campbell (39 units), and Ancora Place (31 units) completed an Agreement to enter into a Housing Assistance Payment (AHAP) at the end of FY 2023.

Friendship Senior Housing (34 units), 285 12th Street (16 units), and 3801 MLK Family Housing (16 units) did not manage to enter into a AHAP contract at the end of FY2023. Lack of tax credit, construction financing, and unavailability of local and state funding were mentioned as the main reason for the delays.

In FY 2023, OHA did not award any new PBVs. A list of all PBV sites is included in Appendix A.

Households Receiving Local, Non-Traditional Services Only (No housing subsidy)

The Family and Community Partnerships Department (FCP) and the OHA Police Department (OHAPD) collaborated to facilitate community-building events and offer supportive services to families through our Education and Employment Initiatives to help families achieve self-sufficiency and life goals. Both East and West Oakland administrative offices re-opened Wi-Fi-connected computer labs, previously closed due to COVID, to assist with the waitlist opening for Peralta Village and Lockwood Gardens, and allow residents to conduct job searches, training, and educational pursuits. Computer labs were utilized by 225 non-OHA participants. Additionally, FCP operated its community food pantries to promote healthy food choices for all, including a new partnership with DoorDash to deliver food bags to elderly and disabled residents living in Campbell Village and OAHPI developments. Food pantries at Lockwood Gardens and Peralta Village shifted back to on-site food pantries, utilizing the client-choice shopping model, 327 of which were non-OHA participants. FCP assisted OHAPD with the Winter Wonderland Celebration for the first time since COVID, to support families with toys and a Chromebook. Twenty (20) non-OHA participants were in attendance. The summer lunch program resumed for youth at Peralta Village and Lockwood Gardens; 86 participants were non-OHA residents. FCP held multiple employment-related events for community members seeking employment, attended by 822 non-OHA households. Overall, OHA assisted 1,480 non-OHA residents with supportive services during the FY.



Table 5: Actual Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA actually served at the end of the Plan Year.

Number of Households Served Through:	Number of Unit Months Occupied/Leased*		Number of Households Served**	
	Planned ^^	Actual	Planned ^^	Actual
MTW Public Housing Units Leased	17,028	16,032	1,419	1,336
MTW Housing Choice Vouchers Utilized	138,312	135,144	11,526	11,262
Local, Non-Traditional: Tenant-Based	2,676	1,728	223	144
Local, Non-Traditional: Property-Based	16,200	13,068	1,350	1,089
Local, Non-Traditional: Homeownership	0	0	0	0
Planned/Actual Totals	174,216	165,972	14,518	13,831

* "Planned Number of Unit Months Occupied/Leased is the total number of months the MTW PHA planned to have leased/occupied in each category throughout the full Plan Year (as shown in the Annual MTW Plan).

** "Planned Number of Households to be Served" is calculated by dividing the "Planned Number of Unit Months Occupied/Leased" by the number of months in the Plan Year (as shown in the Annual MTW Plan).

^^ Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.

Please describe any differences between the planned and actual households served:

The differences in planned versus actual families served is primarily due exceeding utilization targets in the housing choice voucher programs and falling short of targets in various LNT programs.

		Number of Unit Months Occupied/Leased*		Number of Households to be Served*	
Local, Non-Traditional Category	MTW Activity Name/Number	Planned ^^	Actual	Planned ^^	Actual
Property-Based	Fund Affordable Housing Development Activities (08-01) – new tax credit units in service as of FY 2023	780	744	65	62
Property-Based	Fund Affordable Housing Development Activities (08-01) – Existing Tax credit units in service at beginning of FY 2023	9,792	9,756	816	813
Tenant-Based	Local Housing Assistance Program (10-06)	2,676	1,728	223	144
Property-Based	Local Housing Assistance Program (10-06) BB-KTH	276	240	23	20
Property-Based	Local Housing Assistance Program (10-06) Homekey	1,416	0	118	0
Property-Based	PBV Transitional Housing Programs (11-05)- PACT and Building Bridges	888	528	74	44
Property-Based	PBV Transitional Housing Programs (11-05)-Homekey	744	0	62	0
Property-Based	SRO/Studio Apartment Preservation Program (11-03)- Building Bridges	2,304	1,800	192	150

Total		18,876	14,796	1,573	1,233
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* The sum of the figures provided should match the totals provided for each Local, Non-Traditional category in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

^^ Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.

Households Receiving Local, Non-Traditional Services Only	Average Number of Households Per Month	Total Number of Households in the Plan Year
Non-residents	123	1,480

C. Discussion of any Actual Issues/Solutions Related to Leasing

MTW Public Housing

With vacancy rates hovering at 3% or less, public housing did not experience leasing challenges that required solutions. OHA committed to rightsizing families to appropriately sized units to continue to maximize efficient use of the housing stock and used the Standardized Transfer Policy to move families

to appropriately sized units to maintain low vacancy rates. Some units were held offline and purposely remained vacant as OHA began renovations on Harrison Towers.

MTW Housing Choice Voucher

As discussed in Actual Number of Households Served, the HCV program, OHA's largest program, experienced a decrease in utilization. OHA focused on providing services to residents to present more competitive applications with rental assistance coaching and application preparation assistance using its Housing Navigator program.

Other strategies utilized in the HCV program included:

- sign on bonuses to recruit new owner participants (278 new owners added)
- vacancy loss funds to offset delays in re-leasing existing HCV units, 96 MTW owners participated, and 32 non-MTW owners participated. (\$354,965 spent for MTW owners and \$77,620 spent for non-MTW owners) Units had an average vacancy period of 86 days.
- prequalifying inspections to expedite the lease up process – this was suspended during FY 2023 due to COVID
- owner appreciation efforts which normally occur in May were planned in FY 2023, but did not occur until after the FY end
- the Capital Improvement Loan program was modified and piloted for EHV owners in FY 2022. The program awarded up to \$2,250 for approved repairs to bring units into HQS compliance and \$83,850 was spent in FY 2023 to assist 75 owners.

A full description of OHA's activities to commit and lease PBVs is available in Section II A – Housing Stock Information and Appendix B.

Local, Non-Traditional

To better leverage existing funds and services through systems alignment with City and County agencies, and to continue to address Oakland's unsheltered population needs, OHA expanded local service-enriched special needs housing by increasing the families served in the new BB-KTH program, to help assist homeless families with children transitioning out of supportive housing programs in partnership with the City of Oakland and local expert providers. OHA implemented a number of local programs under the Building Bridges initiative, Sponsor Based Housing Assistance and PACT programs with wrap around services that serve Oakland families with special leasing challenges. Populations served included those living in homeless encampments suffering from mental health issues, individuals exiting the criminal justice system, emancipated foster youth and families working within the CalWorks program. While OHA partnered with experts to provide support and services to these households, typical leasing challenges still burden this "hard to house" client base, and OHA with its partners continued to work diligently to support the families to the point of sustained housing stability. Additionally, OHA saw partners experience challenges with finding interested clientele, staff turnover, and COVID related leasing delays with procedural changes and issues with units passing HQS inspections. Participant desire to live outside of Oakland has also caused challenges with utilization of these special programs. Some of these local programs will have to be redesigned or retooled for future use to increase utilization.

Table 6: Discussion of Any Actual Issues/Solutions Related to Leasing

Discussion of any actual issues and solutions utilized in the MTW housing program listed.

Housing Program	Description of Actual Leasing Issues and Solutions
MTW Public Housing	With vacancy rates hovering at 3% or less, public housing did not experience leasing challenges that required solutions. OHA remains committed to rightsizing families to appropriately sized units to continue to maximize efficient use of the housing stock and will use the Standardized Transfer Policy to facilitate moving families to appropriately sized units to maintain low vacancy rates. Some units were held offline and purposely remained vacant as OHA finished renovations on Oak Grove North and South, but construction was completed during the FY and all residents were relocated back into newly renovated units.
MTW Housing Choice Voucher	<p>As discussed in <u>Actual Number of Households Served</u>, the HCV program, OHA's largest program, experienced a decrease in utilization. OHA focused on providing services to residents to present more competitive applications with rental assistance coaching and application preparation assistance using its Housing Navigator program.</p> <p>Other strategies utilized in the HCV program included:</p> <ul style="list-style-type: none"> • sign on bonuses to recruit new owner participants (278 new owners added) • vacancy loss funds to offset delays in re-leasing existing HCV units, 96 MTW owners participated, and 32 non-MTW owners participated. (\$354,965 spent for MTW owners and \$77,620 spent for non-MTW owners) Units had an average vacancy period of 86 days. • prequalifying inspections to expedite the lease up process – this was suspended during FY 2023 due to COVID • owner appreciation efforts which normally occur in May were planned in FY 2023, but did not occur until after the FY end • the Capital Improvement Loan program was modified and piloted for EHV owners in FY 2022. The program awarded up to \$2,250 for approved repairs to bring units into HQS compliance and \$83,850 was spent in FY 2023 to assist 75 owners. <p>A full description of OHA's activities to commit and lease PBVs is available in <u>Section II A – Housing Stock Information and Appendix B</u>.</p>
Local, Non-Traditional	To better leverage existing funds and services through systems alignment with City and County agencies, and to continue to address Oakland's unsheltered population needs, OHA expanded local service-enriched special needs housing by increasing the families served in the new BB-KTH program, to help assist homeless families with children transitioning out of supportive housing programs in partnership with the City of Oakland and local expert providers. OHA implemented a number of local programs under the Building Bridges initiative, Sponsor Based Housing Assistance and PACT programs with wrap around services that serve Oakland families with special leasing challenges. Populations served included those living in homeless encampments suffering from mental health issues, individuals exiting the criminal justice system, emancipated foster youth and families working within the CalWorks program. While OHA partnered with experts to provide support and services to these households, typical leasing challenges still burden this "hard to house" client base, and OHA with its partners continued to work diligently to support the families to the point of sustained housing stability. Additionally, OHA saw partners experience challenges with finding interested clientele, staff turnover, and COVID related leasing delays with procedural changes and issues with units passing HQS inspections. Participant desire to live outside of Oakland has also caused challenges with utilization of these special programs. Some of these local programs will have to be redesigned or retooled for future use to increase utilization.

Waiting List Information**Table 7: Actual Waiting List Information**

Snapshot information on the actual status of MTW waiting lists at the end of the Plan Year. The "Description" column should detail the structure of the waiting list and the population served.

Waiting List Name	Description	Number of Households on Waiting List	Waiting List Open, Partially Open, or Closed	Was the Waiting List Opened During the Plan Year?

Housing Choice Voucher: Tenant-Based	Community Wide	303	Closed	No
Housing Choice Voucher: Project-Based – OHA Managed	Site-Based	340	Closed	Yes.
Housing Choice Voucher: Project-Based – Third Party Managed	Site-Based (Third Party Managed)	41,944	Open	Yes
Public Housing- OHA Managed	Site-Based (OHA Managed)	500	Closed	No
Public Housing – Third Party Managed	Site-Based (Third Party Managed)	1,522	Closed	No

Please describe any duplication of applicants across waiting lists:
Applicants have the opportunity to apply to multiple rental assistance programs and often appear on multiple wait lists.

Table 8: Actual Changes to the Waiting List in the Plan Year

Please describe any actual changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list during the Plan Year.

Waiting List Name	Description of Actual Changes to Waiting List
Housing Choice Voucher: Tenant-Based	None
Housing Choice Voucher: Project-Based OHA Managed	5 waitlist sites had openings throughout the year.
Housing Choice Voucher: Project-Based- Third Party Managed	Tassafaronga has an ongoing open waitlist for 4-bedroom size units. The waitlist at Emperyan Towers was opened in April 2023.
Public Housing – OHA Managed	None
Public Housing- Third Party Managed	None.

D. Information on Statutory Objectives and Requirements

75% of Families Assisted Are Very Low-Income

Approximately, 96 percent of the families in OHA's traditional programs were very low-income, which exceeds the statutory requirement by over 20 percent. About 86 percent of the families' served in local, non-traditional programs incomes fall below the very low-income threshold, which amounts to approximately \$73,950 annually for a family of four. Table 9 shows the breakdown of new families admitted into local, non-traditional programs and the corresponding Area Median Income (AMI) range.

Table 9: 75% of Families Assisted are Very Low Income

HUD will verify compliance with the statutory requirement that at least 75% of the households assisted by the MTW PHA are very low income for MTW public housing units and MTW HCVs through HUD systems. The MTW PHA should provide data for the actual families housed upon admission during the PHA's Plan Year reported in the "Local, Non-Traditional: Tenant-based"; "Local, Non-Traditional: Property-Based"; and "Local, Non-Traditional: Homeownership" categories. Do not include households reported in the "Local, Non-Traditional Services Only" category.

Income Level	Number of Local, Non-Traditional Households Admitted in the Plan Year
80%-50% Area Median Income	44
49%-30% Area Median Income	41
Below 30% Area Median Income	77
Total Local, Non-Traditional Households Admitted	

Maintain Comparable Mix

As reported since FY 2010, the majority of the households on the public housing and HCV waitlists are one-person households. This demographic differs greatly from the percentage of one-person families that were served in the traditional programs prior to MTW. As a result, OHA witnessed a significant increase in the number of one-person households served in traditional programs and saw a corresponding decrease in three-, four-, five, and six-person households served. OHA has managed its MTW programs to meet the needs of the households on the waitlists and the shifting demographics of the local area. Additionally, the HCV program does not use family size as a selection criterion when selecting applicants from the waitlist, nor should it. Given that almost 90% of OHA households are served through the HCV program, the substantial shifts in the composition of family sizes, while remarkable, reflect non-MTW characteristics which are outside of the control of OHA.

Table 10: Maintain Comparable Mix

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served by the MTW PHA prior to entry into the MTW demonstration

Baseline Mix of Family Sizes Served (upon entry to MTW)

Family Size	Occupied Public Housing Units	Utilized HCVs	Non-MTW Adjustments*	Baseline Mix Number	Baseline Mix Percentage
1 Person	705	3158	0	3,863	30%
2 Person	745	2853	0	3,598	29%
3 Person	596	1877	0	2,473	19%
4 Person	344	1318	0	1,662	13%
5 Person	169	588	0	757	6%
6 + Person	76	324	0	400	3%
Total	2,635	10,118	0	12,753	100%

* Non-MTW Adjustments* are defined as factors that are outside the control of the MTW PHA. An example of an acceptable "Non-MTW Adjustment" would include demographic changes in the community's overall population. If the MTW PHA includes "Non-MTW Adjustments", a thorough justification, including information substantiating the numbers given, should be included below.

Please describe the justification for any "Non-MTW Adjustments" give below

N/A

Mix of Family Sizes Served (in Plan Year)

Family Size	Baseline Mix Number	Baseline Mix Percentage**	Number of Households Served in Plan Year	Percentage of Households Served in Plan Year	Percentage Change from Baseline Year to Current Plan Year
1 Person	3,863	30%	7,081	47%	17%
2 Person	3,598	29%	3,884	26%	-3%
3 Person	2,473	19%	1,764	11%	-8%
4 Person	1,662	13%	1,473	10%	-3%
5 Person	757	6%	605	4%	-2%
6 + Person	400	3%	376	2%	-1%
Total	12,753	100%	15,183	100%	0%

** The "Baseline Mix Percentage" figures given in the "Mix of Family Size Served (in Plan Year)" table should match those in the column of the same name in the "Baseline Mix of Family Sizes Served (upon entry to MTW)" table.

^ The "Total" in the "Number of Households Served in Plan Year" column should match the "Actual Total" box in the "Actual Number of Households Served in the Plan Year" table in Section II.B.i of this Annual MTW Report.

^^ The percentages in this column should be calculated by dividing the number in the prior column for each family size by the “Total” number of households served in the Plan Year. These percentages will reflect adjustment to the mix of families served that are due to the decisions of the MTW PHA. Justification of percentages in the current Plan Year that vary by more than 5% from the Baseline must be provided below.

Please describe the justification for any variances of more than 5% between the Plan Year and Baseline Year:

As reported since FY 2010, the majority of the households on the public housing and HCV waitlists are one-person households. This demographic differs greatly from the percentage of one-person families that were served in the traditional programs prior to MTW. As a result, OHA witnessed significant increase to the one-person households served in traditional programs and saw a corresponding decrease in three-, four-, five, and six-person households served. OHA has managed its MTW programs to meet the needs of the households on the waitlists and the shifting demographics of the local area. Additionally, the HCV program does not use family size as a selection criterion when selecting applicants from the waitlist. Given that almost 90% of OHA households are served through the HCV program, the substantial shifts in the composition of family sizes, while remarkable, reflect non-MTW characteristics which are outside of the control of OHA.

Number of Households Transitioned to Self-Sufficiency by Fiscal Year End

OHA implemented three activities that assisted households in achieving self-sufficiency goals. A total of 81 households met the requirements for self-sufficiency as defined for each respective activity. OHA continued to explore the definition of self-sufficiency for activities that were not yet implemented or on hold, in order to establish clarity and consistency around the self-sufficiency goals for participant families.

Table 11: Number of Households Transitioned to Self-Sufficiency in the Plan Year

Number of Households, across MTW activities, that were transitioned to the MTW PHA’s local definition of self-sufficiency during the Plan Year.

MTW Activity Name/Number	Number of Households Transitioned to Self Sufficiency*	MTW PHA Local Definition of Self Sufficiency
PBV Transitional Housing Programs / 11-05	4	Number of PACT participants that move from the site with the notice of graduation.
Alternative Recertification Schedules / 14-01	Due to business system limitations, OHA is unable to measure this metric at this time.	Number of families that remain on a triennial or biennial recertification schedule throughout the fiscal year.
Program Extension for Households Receiving \$0 HAP / 10-02	65	Successful Exit during and after the 12 or 24 months.
PBV Transitional Housing Programs / 11-05 – Building Bridges SRO, Shared and Transitional Housing	12	Number of Households who maintain housing for at least 6 months.
Households duplicated across activities/definitions	N/A	
Total Households Transitioned to Self Sufficiency		81

Section III. Proposed MTW Activities: HUD approval requested

All proposed activities that are granted approval by HUD are reported on in Section IV as “Approved Activities.”

Section IV. Approved MTW Activities: HUD approval previously granted

The activities discussed in this section have been approved by HUD in previous fiscal years.

Table 12 provides a list of all approved MTW activities including the year the activity was implemented and the primary statutory objective(s) the activity is intended to accomplish. Each activity has been assigned a number based on the fiscal year in which the activity was identified and approved (e.g., 15-01 indicates that the activity was identified and approved in the FY 2015).

Table 12: Approved MTW Activities: HUD Approval Previously Granted

Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
20-01	2020	Emergency Relief from Interim Recertifications	Allow wage earning families to self-certify income decreases due to an emergency situation and have OHA pay all or a portion of a tenant's rent for the duration of the declared disaster period	Reduce costs and achieve greater cost effectiveness	Attachment C 4, Section D.1.c, and Use of Funds. Further authorizations are found in Attachment D, Section D, Use of Funds
17-01	2017	Owner Incentives Program	Program to provide support and benefits to existing owners and incentives for owners to join the HCV program	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, Section D.1.d, D.5, B.1, D.1.a, B.1, and Single Fund Flexibility. Attachment D, Section D and Use of Funds
17-02	2017	Automatic Rent Increase	Offer owners an automatic rent increase on the HAP contract anniversary date	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, D.2.b&c
15-02	2016	Modified Utility Allowance Policy	Modifies utility allowance policy to be consistent with FFY 2014 federal appropriations requirements that the household's utility allowance is consistent with the minimum subsidy or occupancy standard and eliminates the utility allowance payment.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.11, D.2.a
15-01	2016	Local Area Portability Reform	Revises portability policies in the Housing Choice Voucher program to limit port-outs to local area jurisdictions except for special circumstances.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.g
14-01	2016	Alternative Recertification Schedules	Changes reexamination of income for elderly and disabled households on fixed incomes to every three years and every two years for wage earning households. Households with fixed income from Social Security will receive automatic adjustments to their rent in interim years based on published cost of living adjustments (COLA) to the subsidy program.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
13-01	2016	Rent Reform Pilot Program	Creates a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where: <ul style="list-style-type: none"> Total Tenant Payment (TTP) calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households Triennial recertification schedule for senior and disabled households, 	-Reduce costs and achieve greater cost effectiveness -Provide incentives for families with children to become economically self-sufficient	Attachment C, Section C.4, C.11 Section D.1.c Section D.2.a

			<p>biennial schedule for work-eligible households</p> <ul style="list-style-type: none"> • Eliminate all deductions and earned income disallowance • Recent increases in income excluded in recertification • Absolute minimum rent of \$25 		
12-01	2012	Eliminate Caps and Time Limits on PBV Allocations	Eliminates the cap on the total number of units the Authority can project-base the number of units that can be project-based in a development and the Time Limit to add additional PBV units to an existing HAP contract.	Increase housing choices	Attachment C, Section D.1.e, Section B.3, Section D.7.
11-01	2011	PBV Occupancy Standards	Modifies the occupancy standards in the PBV program to be consistent with occupancy standards required by other state or locally administered funding in a development (e.g., LIHTC program)	Increase housing choices	Attachment C, Section D.7
11-02	NYI	Standardized Transfer Policy	Creates standard transfer policies in the public housing, Section 8, and project-based assistance programs to increase housing choices for residents.	Increase housing choices	Attachment D, Use of Funds
11-03	NYI	SRO/ Studio Apartment Project-based Preservation Program	Develops a PBV sub-program tailored to the needs of developments with SRO and studio units providing service-enriched housing. OHA will commit long-term PBV subsidies to developments where there is a need to preserve the housing resource.	Increase housing choices	Attachment C, Section D.7
11-05	2011	PBV Transitional Housing Programs	Modifies PBV program rules to permit transitional service enriched housing to fill specific unmet community needs. Used to operate the PACT Program, which provides transitional service enriched housing to mothers returning from prison to reunite with their children.	Increase housing choices	Attachment C, Section B.1, B.4, D.1.a, b,C.D.4 Attachment D, Section B.2
10-01	2010	Specialized Housing Programs	Increases allocation of resources to the PACT program to improve outcomes and enhance program coordination. PACT program is operated in partnership with the Alameda County Sheriff's Department.	Provide incentives for families with children to become economically self-sufficient	Attachment D, Use of Funds
10-02	2010	Program Extension for Households Receiving \$0 HAP	Extends the period of time that a household can remain in the Section 8 program while receiving zero HAP assistance from 6 months to 24 months.	Provide incentives for families with children to become economically self-sufficient	Attachment C, Section D.1.b, D.3.a
10-03	2010	Combined PBV HAP Contract for Multiple Non-contiguous Sites	Allows a single PBV HAP contract to be executed for non-contiguous scattered site buildings organized by AMP or other logical grouping.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.a, D.7
10-04	2010	Alternative Initial Rent Determination for PBV Units	Allows for the use of a comparability analysis or market study certified by an independent agency approved in determining rent reasonableness to establish the initial PBV contract rent.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.2, D.7
10-05	2010	Acceptance of Lower HAP in PBV Units	In situations where a family becomes over housed as a result of conflicting occupancy policies in the conversion from Public Housing to Section 8, this activity allows the landlord or management agent to accept a lower HAP based on the appropriate number of bedrooms for the family and in order to keep the family in-place.	Increase housing choices	Attachment C, Section D.7
10-06	2010	Local Housing Assistance Program	Develops a Local Housing Assistance Program (LHAP) to assist households that otherwise might not qualify for or be successful in the traditional Public Housing and/or Section 8 programs.	Increase housing choices	Attachment D, Use of Funds (SBHAP program), Attachment C, D.1.f, D.1.a, and

			LHAP is provided directly to eligible families and to partnering agencies providing service-enriched housing to special needs populations.		D.3.a (LHAP Programs), C.D.4
10-07	2010	Disposition Relocation and Counseling Services	Provides counseling and relocation assistance to impacted public housing residents in developments approved for disposition.	-Provide incentives for families with children to become more economically self-sufficient -Increase housing choices	Attachment D, Use of Funds
10-08	2011	Redesign FSS Program	Redesigns the FSS Program to incorporate best practices in the industry and encourage partnerships with community-based programs and initiatives.	Provide incentives for families with children to become economically self-sufficient	Attachment C, Section E
10-09	2010	Altered Minimum Stay Requirement in PBV Units	Altered minimum stay requirement for existing tenants in units with PBV assistance.	Increase housing choices	Attachment C, Section D.7
09-01	2011	Alternative HQS System	Uses a risk-based strategy to allocate HQS inspection resources in order to improve compliance at problem properties and allocate fewer resources to properties with a history of compliance.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.5 Attachment D, Section D
09-02	2010	Short-Term Subsidy Program	Provides temporary housing assistance to preserve existing affordable housing resources and allow tenants to remain in-place.	Reduce costs and achieve greater cost effectiveness	Attachment D, Use of Funds
08-01	2008	Fund Affordable Housing Development Activities	Utilizes single-fund budget flexibility to leverage funds to preserve affordable housing resources and create new affordable housing opportunities in Oakland.	Increase housing choices	Attachment D, Use of Funds
07-01 (moved to 14-01)	2010	Triennial Income Recertification	Changes reexamination of income for elderly and disabled households on fixed incomes to every three years. Eligible households receive automatic adjustments to rent in interim years based on published cost of living adjustments (COLA) to the subsidy program (i.e., SS, SSI, etc.)	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
06-01	2006	Site Based Wait Lists	Establishes site-based wait lists in all public housing sites, HOPE IV sites, and developments with PBV allocations.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.1
06-02	2006	Allocation of PBV Units: Without Competitive Process	Allows for the allocation of PBV subsidy to developments owned directly or indirectly, through an affiliated partner, by OHA without using a competitive process.	-Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.a
06-03	2006	Allocation of PBV Units: Using Existing Competitive Process	Allows for the allocation of PBV subsidy to qualifying developments using the City of Oakland NOFA/RFP or other existing competitive process.	-Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.b

A. Implemented Activities

Table 13: Implemented Activities

Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
17-01	2017	Owner Incentives Program	Program to provide support and benefits to existing owners and incentives for owners to join the HCV program	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, Section D.1.d, D.5, B.1, D.1.a, B.1, and Single Fund Flexibility. Attachment D, Section D and Use of Funds
15-02	2016	Modified Utility Allowance Policy	Modifies utility allowance policy to be consistent with FFY 2014 federal appropriations requirements that the household's utility allowance is consistent with the minimum subsidy or occupancy standard and eliminates the utility allowance payment.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.11, D.2.a
15-01	2016	Local Area Portability Reform	Revises portability policies in the Housing Choice Voucher program to limit port-outs to local area jurisdictions except for special circumstances.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.g
14-01	2016	Alternative Recertification Schedules	Changes reexamination of income for elderly and disabled households on fixed incomes to every three years and every two years for wage earning households. Households with fixed income from Social Security will receive automatic adjustments to their rent in interim years based on published cost of living adjustments (COLA) to the subsidy program.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
12-01	2012	Eliminate Caps and Time Limits on PBV Allocations	Eliminates the cap on the total number of units the Authority can project-base the number of units that can be project-based in a development and the time limit to add additional PBV units to existing HAP contracts.	Increase housing choices	Attachment C, Section D.1.e, Section B.3, Section D.7
11-01	2011	PBV Occupancy Standards	Modifies the occupancy standards in the PBV program to be consistent with occupancy standards required by other state or locally administered funding in a development (e.g., LIHTC program)	Increase housing choices	Attachment C, Section D.7
11-02	NYI	Standardized Transfer Policy	Creates standard transfer policies in the public housing, Section 8, and project-based assistance programs to increase housing choices for residents.	Increase housing choices	Attachment D, Use of Funds
11-03	2017	SRO/ Studio Apartment Preservation Program	Develops a sub-program tailored to the needs of developments with SRO and studio units. OHA will commit long-term subsidies to developments where there is a need to preserve the housing resource.	Increase housing choices	Attachment C, Section D.7
11-05	2011	PBV Transitional Housing Programs	Modifies PBV program rules to permit transitional service enriched housing to fill specific unmet community needs. Used to operate the PACT Program, which provides transitional service enriched housing to mothers returning from prison to reunite with their children.	Increase housing choices	Attachment C, Section B.1, B.4, D.1.a,b, C.D.4 Attachment D, Section B.2
10-01	2010	Specialized Housing Programs	Increases allocation of resources to the PACT program to improve outcomes and enhance program coordination. PACT program is operated in partnership with the Alameda County Sheriff's Department.	Provide incentives for families with children to become economically self-sufficient	Attachment D, Use of Funds
10-02	2010	Program Extension for Households Receiving \$0 HAP	Extends the period of time that a household can remain in the Section 8 program while receiving zero HAP assistance from 6 months to 24 months.	Provide incentives for families with children to become economically self-sufficient	Attachment C, Section D.1.b, D.3.a
10-03	2010	Combined PBV HAP Contract for Multiple Non-contiguous Sites	Allows a single PBV HAP contract to be executed for non-contiguous scattered site buildings organized by AMP or other logical grouping.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.a, D.7

10-04	2010	Alternative Initial Rent Determination for PBV Units	Allows for the use of a comparability analysis or market study certified by an independent agency approved in determining rent reasonableness to establish the initial PBV contract rent.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.2, D.7
10-05	2010	Acceptance of Lower HAP in PBV Units	In situations where a family becomes over housed as a result of conflicting occupancy policies in the conversion from Public Housing to Section 8, this activity allows the landlord or management agent to accept a lower HAP based on the appropriate number of bedrooms for the family and in order to keep the family in-place.	Increase housing choices	Attachment C, Section D.7
10-06	2010	Local Housing Assistance Program	Develops a Local Housing Assistance Program (LHAP) to assist households that otherwise might not qualify for or be successful in the traditional Public Housing and/or Section 8 programs. LHAP is provided directly to eligible families and to partnering agencies providing service-enriched housing to special needs populations.	Increase housing choices	Attachment C, Section D.1.f, D.1.a and D.3.a and C.D.4 (LHAP Programs), Attachment D, Use of Funds (SBHAP Program)
10-09	2010	Altered Minimum Stay Requirement in PBV Units	Altered minimum stay requirement for existing tenants in units that have PBV assistance.	Increase housing choices	Attachment C, Section D.7
08-01	2008	Fund Affordable Housing Development Activities	Utilize single-fund budget flexibility to leverage funds to preserve affordable housing resources and create new affordable housing opportunities in Oakland.	Increase housing choices	Attachment D, Use of Funds
06-01	2006	Site Based Wait Lists	Establishes site-based wait lists in all public housing sites, HOPE IV sites, and developments with PBV allocations.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.1
06-02	2006	Allocation of PBV Units: Without Competitive Process	Allows for the allocation of PBV subsidy to developments owned directly or indirectly, through an affiliated partner, by OHA without using a competitive process.	-Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.a
06-03	2006	Allocation of PBV Units: Using Existing Competitive Process	Allows for the allocation of PBV subsidy to qualifying developments using the City of Oakland NOFA/RFP or other existing competitive process.	Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.b

MTW Activity #17-01: Owner Incentives Program

Year Approved: 2017

Year Implemented: 2017

Year Amended: N/A

Description/Impact/Update: The Housing Choice Voucher program was impacted by a dramatically escalating rental market and very limited inventory, which led to much longer search times and multiple voucher extensions being granted for families searching for housing. In 2015, OHA saw many owners choose to leave the program or remove units by not releasing, resulting in the loss of approximately 824 units of affordable housing. In response to these market conditions, OHA proposed the Owner Incentives Program activity to support existing and recruit new owners to the program to offset the exodus.



This activity offers a range of services that both support and retain existing HCV owners by providing enhanced services to existing owners, especially those that are high performers. OHA is also looking to recruit new owners by offering incentives to sign on. Program components are as follows:

- Vacancy loss payments of up to two months—HAP will be offered to existing HCV owners if they re-rent a unit previously occupied by an HCV tenant to another HCV participant within two months of contract cancellation. Based on average HAP amounts, total costs for OHA to implement vacancy loss payments for FY 2023 was \$354,965 for MTW households and \$77,620 for non-MTW households serving 128 owners which was slightly up from FY 2022.
- Pre-qualifying unit inspections will be offered to all HCV program owners to expedite the lease up process and minimize delays or losses due to inspections. Inspections will not be linked to a participant and allow owners up to 60 days to find a tenant once an inspection has been passed. No additional costs are anticipated. In FY 2023, OHA suspended expedited inspections due to the COVID-19 pandemic and as the pandemic eased, staffing needed to be ramped up to re—instate these inspections. Resources were shifted to conduct regular move-in inspections and as a result, no pre-qualifying inspections were performed in FY 2023.
- Owner recognition program – Recognize long-term owners (5 years or more) with 5 or more units on the program that maintain at least one unit on a biennial inspection schedule. Owners will receive awards and special designations to highlight their status as long-term providers of quality units. In FY 2023, OHA made 10 payments totaling \$6,280 for the owner recognition program.
- New Landlord Incentive Payment – Provides new owner participants a one-time payment of \$1,000 upon execution of a new HAP contract, and other defined eligibility criteria. OHA had 278 new landlords sign up for the program in FY 2023 which is an increase of 12.5% from FY 2022. OHA paid \$548,000 in \$1,000 bonuses to owners for MTW households.
- Capital Improvement Payment –Offer landlords that have failed a second inspection and are entering abatement a payment of up to \$2,500 to address capital improvement issues related to the reason for the HQS inspection failure. Landlords will apply for the payment and furnish documentation on the estimated repair costs for the improvement. Payments will be repaid to OHA via reduced HAP payments made to the owner over a 6-month period. Projected costs are estimated using the maximum payment of \$2,500 per landlord and are based on the number of landlords that had failed second inspections in FY 2015 and the projected cost is approximately \$385,000. OHA intends to recoup these costs by paying a lower HAP to the landlord over a 6-month period and anticipates some loss due to landlords that may exit the program and not repay the loan. OHA will rely on the program compliance team in leased housing to pursue any outstanding loan payments. In FY 2023, OHA paid \$28,479 to 22 MTW Owners in capital improvement payments.
- Homeownership Incentive – OHA will reimburse owners up to \$25,000 in closing related costs to cover inspections, sewer lateral work, and city and county transfer taxes for owners using title company closing statements and verified invoices, for owners willing to sell their house to an HCV participant who is currently renting the house through the HCV program. This was not utilized during the FY.

- Exception Payment Standards Hubs – OHA planned to establish exception payment standards up to 150% of the Fair Market Rents (FMRs) without HUD approval for owners and units that are in hubs with low voucher presence or low concentration of poverty. These hubs might include proximity to multiple transit resources and grocery/retail centers, schools within walking distance, recent tenant lease-up data, third-party market research information supporting the increase, forums with staff and residents, properties less than 10 years old, districts with high public school ratings/test scores, and/or low poverty and crime rates. This includes units that are fully accessible and meeting the requirements of the Uniform Federal Accessibility Standard (UFAS). This was not utilized during the FY.

Actual Non-Significant Changes: OHA increased the leasing bonus from \$500 to \$1000 and offers it to all owners instead of just new owners. OHA modified the “Capital Improvement Payment” to be a payment of up to \$2,250 for approved HQS fail repairs. This payment does not need to be repaid. Additional changes were proposed, but not utilized during the FY.

Actual Changes to Metrics/Data Collection: There had no changes to metrics or data collection.

Actual Significant Changes: OHA has no significant changes to report.

Challenges in Achieving Benchmarks and Possible Strategies: There were no challenges or new strategies to report.

Standard OHA Metrics

Number of New Landlords Recruited by Payment Incentive

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new landlords where sign on payment was an incentive to enroll in HCV program	Average number of new landlords where sign on payment was an incentive to enroll in HCV program = 0	Average number of new landlords where sign on payment was an incentive to enroll in HCV program = 75 (75% increase)	Actual number of new landlords where sign on payment was an incentive to enroll in HCV program = 278	Yes. OHA greatly exceeded the benchmark.

Standard HUD Metrics

CE #1: Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease). Pre-qualifying inspections	Cost of task prior to implementation of the activity = (staff salary)* .25 hours * number of files = (\$46.14 * .25) * 1,222 = \$14,096	Cost of task after implementation of the activity =(staff salary)* .10 hours * number of files = (\$46.14 * .10) * 800 = \$3,691	Actual cost of task in dollars after implementation of activity = \$46.14* .10 hours * 56 = \$258	Yes.

CE #2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease) Pre-qualifying inspections	Total amount of staff time dedicated to the task prior to implementation of the activity = .25 hours * 1,222 households = 305 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = .10 hours * 800 households = 80 hours	Actual amount of total staff time dedicated to the task after implementation of the activity = .10 hours * 56 = 5.6 hours	Yes. It was exceeded.

CE #3: Decrease in Error Rate of Task Execution

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease) Pre-qualifying inspections	Average error rate of task prior to implementation of the activity as a percentage = 20% (decrease)	Expected error rate of task after implementation of the activity as a percentage = 15% (decrease)	Actual error rate of task after implementation of the activity as a percentage (decrease) = 15%	Yes.

MTW Activity #15-01: Local Area Portability Reform

Year Approved: 2015

Year Implemented: 2015

Year Amended: N/A

Description/Impact/Update: A local area portability policy that will limit elective moves to jurisdictions within the nine Bay Area counties identified by the Association of Bay Area Governments: Alameda County, Contra Costa County, Marin County, Napa County, San Francisco County, San Mateo County, Santa Clara County, Solano County, and Sonoma County. While the objective of the Housing Choice Voucher program is to provide increased housing options for families, OHA has found that when many households exercise the option to move with their vouchers to neighboring housing authorities, especially those without MTW programs or with higher payment standards, it creates an administrative burden. This activity is designed to allow OHA to mitigate the number and areas of concentration of port out requests, and their negative impact on program administration and self-sufficiency goals. In FY2016, it was implemented in five counties. The policy will be expanded in the future to include additional jurisdictions as needed.

- A hardship policy allows families to move their tenant-based vouchers locally under limited circumstances such as the following exceptions:
- Reasonable accommodation for persons with a disability
- Verifiable employment opportunity more than 35 miles from the City of Oakland limits and at least 20 hours per week minimum wage applicable in the state
- Situations covered underneath the Violence Against Women Act (VAWA)
- Participants porting out for education for the head of household and or spouse only will need to show proof of full-time enrollment at a college or university
- Verifiable threat to the physical safety of the family
- OHA port-outs where the receiving Public Housing Authority (PHA) absorbs the voucher
- Port-outs for vouchers that OHA is administering (unabsorbed) due to those vouchers porting in from another PHA
- Declared natural disaster or state of emergency

Any exceptions to this policy will be reviewed by the Executive Director, or his designee, on a case-by-case basis.

OHA allowed current port-out households to remain in their current jurisdiction. However, upon implementation, this policy also will apply to any port-out households that request to port to another jurisdiction. During FY 2023, OHA received a total of 485 requests for portability compared to the baseline of 1,100 total requests which is a drop of 56% in port requests overall and the number of requests has increased slightly over last year. Of the 485 requests received, 358 (74% of the total) were for the five restricted counties compared to 924 (87% of total) requests to these counties seen in FY2015. In FY 2023 many of the neighboring counties that were restricted did absorb ports. Sixty-one (61) requests to port were denied to a restricted county because the neighboring housing authority did not absorb them.

OHA is seeing a reduction in port outs due to this activity as neighboring counties have stopped absorbing ports. Historically OHA had over 1,200 housing choice vouchers ported to neighboring jurisdictions that have not been absorbed by the receiving jurisdiction. Currently OHA has 58 vouchers ported to neighboring jurisdictions, which have not been absorbed.

Due to the restrictions imposed, the Oakland Housing Authority denied 61 requests to port to these jurisdictions. Many of these participants applied for an exception to the portability restriction. While there are efficiencies in lowering the number of ports being administered, there are significant time expenditures in processing exception requests.

Actual Non-Significant Changes: OHA initiated the activity for the first year of implementation for only five counties and does not currently plan to expand the activity to the other four restricted counties.

Actual Changes to Metrics/Data Collection: There were no changes to the metrics or data collection included in the Standard HUD Metrics table below.

Actual Significant Changes: OHA had no significant changes planned for this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA had no new challenges or strategies in this fiscal year.

Standard HUD Metrics				
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease). Local Port-out Requests	Cost of task prior to implementation of the activity = \$46.94 (Staff Salary) * 1.5 hours * 700 port-out requests = \$49,287	Expected cost of task after implementation of the activity = \$46.94 * 1.5 hours * 350 = \$24,644 (50% reduction)	Actual cost of task after implementation = \$25,207 (based on 61 rejected requests)	No. The benchmark was not achieved.
Administering Local Port-outs	Cost of task prior to implementation of the activity = \$46.94 (Staff Salary) * 1 hours * 1,100 port-out requests = \$51,634	Expected cost of task after implementation of the activity = \$46.94 (Staff Salary) * 400 port-out requests = \$18,776 (36% reduction)	Actual cost of task after implementation = \$2,723 (58 annual average of ports administered)	Yes. The benchmark was exceeded.

Total cost of task in dollars.	Total cost of task prior to implementation of the activity = \$49,287 + \$51,634 = \$100,921	Total expected cost of task after implementation of the activity = \$24,644 + \$18,776 = \$43,410 (57% reduction)	Actual cost of task after implementation = \$25,207+\$2,723= \$27,930 (72% reduction)	Yes. The benchmark was exceeded.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease). Local Port-Out Requests	Total amount of staff time dedicated to the task prior to implementation of the activity = 1.5 hours * 700 requests =1,050 staff hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 1.5 hours * 350 requests = 525 hours (50% reduction)	Actual staff time dedicated to the task after implementation of the activity = 1.5 hours * 358 requests = 537 hours	No.
Administering Local Port-outs	Total amount of staff time dedicated to the task prior to implementation of the activity = 1 hour * 1,100 =1,100 staff hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 1 hour * 825 requests = 825 hours (25% reduction)	Actual staff time dedicated to the task after implementation of the activity = 1 hour * 58 requests = 58 hours (95% reduction)	Yes. The benchmark was exceeded.
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task prior to implementation of the activity = 1,050 + 1,100 = 2,150 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 525 + 825 = 1,350 hours (37% reduction)	Actual amount of total staff time dedicated to the task after implementation of the activity = 537 + 58 = 595 hours (reduction)	Yes. The benchmark was exceeded.

MTW Activity #15-02: Modified Utility Allowance Policy

Year Approved: 2015

Year Implemented: 2015

Year Amended: N/A

Description/Impact/Update: A modification to past policies which streamlines utility allowances to be consistent with the household's minimum subsidy or occupancy standard and eliminates the utility allowance payment. OHA saw a decrease of 100% in the cost of utility allowances paid as Utility Reimbursement Payments (URP). There were no URP payments for public housing families and only one payment for an HCV family during the past year, which is being corrected. This is a 100% reduction since inception as all families have had URP payments eliminated. The reduction of utility allowances, which took effect at recertification or interim visits, was staged in. We have started to see the savings decrease over time as the cost of utilities continues to be adjusted upwards and baseline costs have stayed static. OHA implemented allowances to pay based on subsidy size for HCV residents only and have not yet implemented changes for public housing.

Actual Non-Significant Changes: There were no non-significant changes to report.

Actual Changes to Metrics/Data Collection: There were no changes or modifications to the metrics or data collection.

Actual Significant Changes: OHA did not make any significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not experience any challenges or the need to develop new strategies for this activity.

CE #1: Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total average annual cost of task in dollars (decrease). Utility Allowance	Cost of task prior to implementation of the activity (in dollars) = \$11,188,104 per year	Expected cost of task after implementation of the activity = \$10,228,812 (9% reduction)	Actual cost of task after implementation of the activity = \$1,255,115	Yes, the benchmark was greatly exceeded.
Total cost of task in dollars (decrease). Utility Reimbursement Payment	Cost of task prior to implementation of the activity = Utility Reimbursement Payment = \$220,968 per year	Expected cost of task after implementation of the activity (in dollars) = \$0 (100% reduction)	Actual cost of task after implementation of the activity (in dollars) = \$0 (100% reduction)	Yes. A reduction of 100% was achieved.
Total cost of task in dollars (decrease). Staff	Cost of task prior to implementation of the activity = (Staff salary) * .05 hours * number of files = (\$46.14 *.05) * 2,904 = \$6,699	Cost of task after to implementation of the activity = Zero (0)	Cost of task after implementation of the activity = (\$46.14*.05) *0= \$0 (100% reduction).	Yes. A reduction of 100% was achieved
Total cost of task in dollars.	Total cost of task prior to implementation of the activity = \$11,188,104 + \$220,968 + \$6,699 = \$11,415,771	Total expected cost of task after implementation of the activity = \$10,228,812 + \$0 = \$10,228,812 (9% reduction)	Actual cost of task after implementation of the activity = \$1,255,115+ \$0 = \$1,255,115	Yes. A reduction was achieved.

CE #2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours Utility Reimbursement Payment	Total amount of staff time dedicated to the task prior to implementation of the activity = .05 hours * 2,909 checks = 145 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 0 hours * 2,909 checks = 0 hours	Actual amount of staff time dedicated to the task after implementation of the activity = 0.05 hours * 0 checks = 0 hours	Yes. The Benchmark was achieved.

CE #3: Decrease in Error Rate of Task Execution

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate in completing a task as a percentage prior to implementation = 10%	Expected error rate in completing a task as a percentage prior to implementation = 5%	Actual error rate in completing a task as a percentage prior to implementation = <.0001%	Yes.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue/total tenant payment in dollars (increase). Housing Choice Voucher (HCV)	Rental revenue prior to implementation of the activity (in dollars) = \$4,343,040	Expected rental revenue after implementation of the activity (in dollars) = \$5,191,848 (20% increase)	Actual rental revenue after implementation of the activity (in dollars) = \$10,991,459	Yes.
Rental revenue/total tenant payment in dollars (increase). Public Housing	Rental revenue prior to implementation of the activity (in dollars) = \$2,215,116	Expected rental revenue after implementation of the activity (in dollars) = \$2,222,460 (Less than 1% increase)	Public Housing sites have not implemented the activity	
Total rental revenue/total tenant payment in dollars (increase).	Total rental revenue prior to implementation of the activity (in dollars) \$6,558,156	Total expected rental revenue after implementation of the activity (in dollars) = \$7,414,308 (15% increase)	Actual rental revenue after implementation of the activity (in dollars) = \$10,991,459	Yes.

MTW Activity #14-01: Alternative Recertification Schedules

Year Approved: 2014

Year Implemented: 2014

Year Amended: 2017, 2020

Description/Impact/Update: Regulations require that a household's income is recertified for program eligibility and rent calculations once a year. In FY 2007, MTW activity #07-01 was approved allowing for a triennial recertification schedule for elderly and/or disabled households on a fixed income in the Public Housing and HCV programs. In the interim years, at the discretion of the Executive Director, an automatic adjustment may be applied to the households' housing payment equal to the cost of living adjustment (COLA) made to the households' related income subsidy program. This activity has been implemented in the HCV program and at two senior-designated properties in the Public Housing program. This schedule has been effective at reducing staff time and costs, as well as being less intrusive and time consuming for residents. Activity #14-01 incorporates changes made by Activity #07-01 and changes the recertification schedule for wage earning households to once every two years. All households that report no income, no income from wages, or temporary income remain on an annual recertification schedule to report increases in income. OHA and participant families will experience time savings related to the forgone re-certifications. Participant families on the biennial or triennial schedule may also see income savings as a result of OHA not recalculating rent portions during the interim. OHA will use this activity for RAD voucher holders.

Actual Non-Significant Changes: There are no non-significant changes to report.

Actual Changes to Metrics/Data Collection: There were no changes to the metrics or data collection methods this year.

Actual Significant Changes: No significant changes for this year.

Challenges in Achieving Benchmarks and Possible Strategies: OHA initiated the activity for the first year of implementation. OHA experienced challenges with implementation due to the new business system that was implemented in 2015 and met with the vendor to specify custom modifications to accommodate this activity. Due to system limitations that would cause staff to do manual overrides for recertification dates for all biennial and triennial families, OHA elected to continue with the select group of triennial families for which the activity had been implemented under #07-01.

Changes or Modifications to the Data Collection Methodology: There were no changes to the data collection methodology included in the Standard HUD Metrics table below.

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease). Triennial HCV Reexam Calculation	Cost of task prior to implementation of the activity (in dollars) = \$111,940	Expected cost of task after implementation of the activity = \$57,985 (48% reduction)	Actual cost of task in dollars after implementation of the activity = \$54,507	Yes. The benchmark was achieved.
Total cost of task in dollars (decrease). Triennial Public Housing Reexam Calculation	Cost of task prior to implementation of the activity = \$42,000	Expected cost of task after implementation of the activity (in dollars) = \$21,000 (50% reduction)	Actual cost of task in dollars after implementation of the activity = \$5,748	Yes. The benchmark was exceeded.
Total cost of task in dollars (decrease). Biennial HCV Reexam Calculation	Cost of task prior to implementation of the activity (in dollars) = \$146,300	Expected cost of task after implementation of the activity = \$73,150 (50% reduction)	Actual Cost of task in dollars after implementation of the activity = \$124,849	No.
Total cost of task in dollars (decrease). Biennial Public Housing Reexam Calculation	Cost of task prior to implementation of the activity (in dollars) = \$29,250	Expected cost of task after implementation of the activity = \$14,625 (50% reduction)	Not Implemented	
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars) = \$329,490	Expected cost of task after implementation of the activity (in dollars) = \$166,760 (51% reduction)	Actual cost after implementation of the activity (in dollars) = \$54,507+\$5,748+\$124,849=\$185,104	No
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Total time to complete the task in staff hours (decrease). Triennial HCV Reexam Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 2,678 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 1,475 hours (37% reduction)	Actual amount of staff time to complete after implementation of the activity in hours = 1,043	Yes. The benchmark was exceeded. The actual time used was 29% below the benchmark.
Total time to complete the task in staff hours (decrease). Triennial Public Housing Reexam Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 1,680 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 840 hours (50% reduction)	Actual amount of staff time to complete the task after implementation of the activity in hours = 110	Yes. The benchmark was exceeded by 87%.
Total time to complete the task in staff hours (decrease). Biennial HCV Reexam Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 3,500 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 1,750 hours (50% reduction)	Actual amount of staff time to complete the task after implementation of the activity in hours = 2,389	No. The benchmark was not achieved.
Total time to complete the task in staff hours (decrease). Biennial Public Housing Reexam Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 1,170 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 585 hours (50% reduction)	Not Implemented	
Total time to complete the task in staff hours (decrease). Public housing and HCV	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 9,028 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 4,650 hours (52% reduction)	Actual amount of staff time to complete the task after implementation of the activity (in hours) = 1,043+110+2,389=3,542	Yes.

CE #5: Increase in Agency Rental Revenue

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase). Housing Choice Voucher and Public Housing	Rental revenue prior to implementation of activity = \$3,863,650	Expected rental revenue after implementation of the activity (in dollars) = \$5,096,518 (25% increase)	Actual rental revenue after implementation of the activity (in dollars) = \$46,364,748	Yes.

SS #1: Increase in Household Income

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars) = Public Housing: \$10,926 HCV: \$14,444	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars) = Public Housing: \$12,020 (10% increase) HCV: \$15,888 (10% increase)	Actual average earned income of households affected by this policy after to implementation of the activity (in dollars) = Public Housing: \$23,040 (92% increase) HCV: \$27,338 (89% increase)	Yes

SS #3: Increase in Positive Outcomes in Employment Status

Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category:	Triennial families do not earn income – all sources are fixed. The components of this metric are not currently measured in OHA's business system.			
(1) Employed Full-Time				
(2) Employed Part-Time				
(3) Enrolled in an Educational Program				
(4) Enrolled in Job Training Program				
(5) Unemployed				
(6) Other-Drug Rehab Counseling				
Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Unknown			

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF prior to implementation of this activity = 100 households	Number of households receiving TANF after implementation of this activity = 1, 500 households (10% decrease)	This is not applicable to families on fixed income. These are the only households where this activity has been implemented.	N/A.

SS #8: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating	Number of households transitioned to self-sufficiency prior to implementation of this activity = Zero (0)	Number of households transitioned to self-sufficiency after implementation of this activity = 10% of eligible households	OHA is currently unable to measure this metric. OHA will explore procedures to track this info or modify the definition.	

Information in the space provided.				
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MTW Activity #12-01: Eliminate Caps on PBV Allocations

Year Approved: 2012

Year Implemented: 2012

Year Amended: N/A

Description/Impact/Update: Eliminate caps on project-based voucher (PBV) allocations. Under the existing regulations, Public Housing Authorities (PHA) are limited to project-basing up to 20 percent (20%) of the amount of budget authority allocated to the PHA by HUD in the PHA voucher program. In addition, PHAs are limited to project-basing up to 25 percent (25%) of units in a single development. Previously, OHA has received approval in the FY 2010 MTW Plan to remove the cap on the number of PBVs allocated to a single development. This activity was expanded on the previously approved activity to eliminate caps on PBV allocations in all areas.

The Housing Opportunity Through Modernization Act (HOTMA) has increased the per project cap by allowing PBV allocations of up to the greater of 25% or 25 units in a project. Under HOTMA, OHA would be restricted to award PBV allocations of up to 20% of its ACC authorized units and the greater of 25% or 25 units per project. Since inception, OHA contributed to the creation and preservation of 5,385 PBV assisted units. If the projects were limited to a 25% cap, only 1,347 units would have been eligible for assistance. Through this activity, OHA has been able to assist 4,038 additional units. Table 14 provides a breakdown of the PBVs awarded by development about the 25% cap, although none were added during FY 2023.

Actual Non-Significant Changes: There were no non-significant changes to this activity. In FY 2023, OHA did not award any PBV project above the 25% CAP and, therefore, OHA did not utilize this MTW activity.

Actual Changes to Metrics/Data Collection: No changes to the metrics or data collection.

Actual Significant Changes: OHA does not have any significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA does not have any challenges to report with this activity. In FY 2023, OHA did not award any PBV project above the 25% CAP and, therefore, OHA did not utilize this MTW activity.

Table 14: Total Number of PBV Units Awarded Above the 25% Cap

Site Name	Total Units	25% of the Total Units	Total PBV Units Allowed	PBV Units Awarded Above the 25% Cap
Senior Housing				
Jack London Gateway Phase II	61	15	60	45
Orchards on Foothill	65	16	64	48
Altenheim Senior Housing Phase II	81	20	40	20
St. Joseph's Senior Apartments	84	21	83	62
Merritt Crossing (aka 6 th & Oak Apts.)	70	17	50	33
Lakeside Senior Apartments	92	23	91	68
Lion Creek Crossing Phase V	128	32	127	95
Harrison Street Senior Housing	72	18	11	
Altenheim Senior Housing Phase I	93	23	23	
Bishop Roy C. Nicholas	17	4	16	12
Sylvester Rutledge Manor	64	16	64	48
Oak Street Apts.	39	9	25	16
Oak Grove North and South	152	38	152	114
3268 San Pablo (aka Monarch Homes)	51	13	50	37
Brooklyn Basin 2 (aka Vista Estero)	110	28	82	55
Friendship Senior Housing	50	13	34	21
Senior Housing Total	1229	306	972	674
Special Needs Housing				
Fairmount	31	8	16	8
Jefferson Oaks (aka Savoy)	102	25	101	76
California Hotel	137	34	135	101
1701 Martin Luther King Jr. Way	25	6	25	19
Redwood Hill Townhomes	28	7	28	21
Fruitvale Transit Village- Phase IIA	92	23	66	43
Embark Apartments	62	15	61	46
Rosa Parks	11	2	11	9
Eastside Arts & Housing	15	3	10	7
Empyrean	66	16	32	16
Nova Apartments	56	14	56	42
Civic Center TOD	40	10	20	10
95 th and International	55	14	27	13
Fruitvale Studios	24	6	12	6
Aurora Apartments	44	11	43	32
San Pablo Hotel	144	36	31	

Special Needs Housing Total	932	230	674	417
Family Affordable Housing				
Mandela Gateway	168	42	30	
Lion Creek Crossing Phase II	146	37	18	
Foothill Family	65	16	11	
14th Street (Ironhorse)	99	25	20	
Lion Creek Crossing Phase IV	72	18	10	
St. Joseph Family	83	21	15	
Mural aka MacArthur Transit Village	90	23	22	
Ambassador Apartments	69	17	10	
Hismen Hin-Nu Terrace	92	23	10	
Town Center at Acorn	206	52	50	
3706 San Pablo (aka Estrella Vista)	87	22	20	
94th and International	59	15	14	
Drachma Inc and LP	33	8	25	17
Oak Point Limited	31	7	15	8
James Lee Court	26	6	12	6
Drasin Manor	26	6	25	19
MacArthur Apartments	32	8	14	6
11th and Jackson	71	17	35	18
Cathedral Gardens	100	25	43	18
460 Grand	68	17	34	17
Effie's House	21	5	10	5
Slim Jenkins	32	8	11	3
Marcus Garvey	22	6	10	5
Harp Plaza	20	5	19	14
Madison Park Apartments	98	24	96	72
Hugh Taylor House	43	10	35	25
Coliseum Place	59	14	37	23
Courtyards at Acorn	87	21	30	9
Oak Park Apts	35	8	10	2
Clinton Commons	55	11	16	5
Swan Market	18	4	10	6
Hamilton Apts.- (Mod Rehab Conv.)	92	23	92	69
International Blvd Apts.	30	7	18	11
Northgate Apts.	41	10	14	4
Stanley Avenue Lofts	24	6	13	7
Adeline Street Lofts	38	9	20	11
Westlake Christian Terrace West	200	50	121	71
Seven Directions	36	9	28	19
Fox Court Apts	80	20	33	13

Madsion Apts.	78	20	50	30
Kenneth Henry Ct	51	12	28	16
Camino 23	32	8	26	18
Brooklyn Basin 1 (aka Paseo Estero)	101	25	50	25
Brooklyn Basin 3 (aka Foon Lok West)	130	33	65	33
Ancora Place	77	19	31	12
West Grand and Brush	59	15	28	13
34 th and San Pablo	60	15	25	10
7 th and Campbell	79	20	39	19
3801 MLK	32	8	16	8
285 12 th Street	65	16	16	0
Fruitvale Transit Village- Phase IIB	181	45	75	30
Brooklyn Basin 4 (aka Foon Lok East)	123	31	61	30
Family Affordable Housing Total	2,486	610	1,566	726
OHA Former Public Housing				
OHA Scattered Sites (On going)	1,539	385	1,539	1,154
Tassafaronga Village Phase I	137	34	80	46
Tassafaronga Village Phase II	20	5	19	14
Former Public Housing Total	1,696	424	1,638	1,214
Total Units	6,343	1,570	4,850	3,031

Standard HUD Metrics

HC #4: Displacement Prevention

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity = Zero (0)	Expected households losing assistance/moving after implementation of the activity = Zero (0)	Number of households losing assistance/moving after implementation of the activity = N/A	N/A. OHA did not utilize this activity in FY 2023.

Standard OHA Metrics

Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of PBV units awarded above the greater of 25 units or 25% of the total units in a project = Zero (0) units Number of PBV units awarded above 20% of total units in voucher program = Zero (0) units	Expected housing units preserved after implementation of the activity = 100 units	Actual number of PBV units awarded above the greater of 25 units or 25% of the total units in a project = N/A Actual number of PBV units awarded above 20% of total units in voucher program = N/A	N/A. OHA did not utilize this activity in FY 2023.
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Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0) units	Expected housing units preserved after implementation of the activity = 100 units	Actual housing units preserved prior to implementation of the activity = N/A	N/A. OHA did not utilize this activity in FY 2023.

Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 50 households	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = N/A	N/A. OHA did not utilize this activity in FY 2023.

Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = 25 households	Actual number of households receiving these services after implementation of the activity = N/A	N/A. OHA did not utilize this activity in FY 2023.

MTW Activity #11-01: PBV Occupancy Standards

Year Approved: 2011
Year Implemented: 2011
Year Amended: N/A

Description/Impact/Update: Modify the occupancy standards in the PBV program to be consistent with occupancy standards required by other state or locally administered funding in a development (e.g., LIHTC program). Based on family composition, under this activity a family may qualify for a larger bedroom size than they would have under the previous policy. The activity applies to new participants

in the PBV program and to in-place families whose household composition changes would require them to relocate.

Actual Non-Significant Changes: OHA had no non-significant changes to report this year.

Actual Changes to Metrics/Data Collection: Changes to the metrics and data collection methodology are included in the table below.

Actual Significant Changes: OHA made no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not have any challenges to report with this activity.

Standard HUD Metrics				
HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	Number of Households losing assistance or forced to move prior to implementation of the activity = Three (3) households	Expected households losing assistance/moving after implementation of the activity = Zero (0) households	This activity was not used in FY 2023.	N/A.
HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = Zero (0) households	This activity was not used in FY 2023.	N/A.
Standard OHA Metrics				
Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of households who would not qualify for an available unit based on household composition = Zero (0) households	Expected housing units of this type after implementation of the activity = 5 households	This activity was not used in FY 2023.	N/A.
Units of Housing Preserved				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0) units Verify	Expected housing units preserved after implementation of the activity = 2 units	This activity was not used in FY 2023.	N/A.
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Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = 5 households	This activity was not used in FY 2023.	N/A.

MTW Activity #11-02: Standardize Transfer Policy

Year Approved: 2011
Year Implemented: 2011
Year Amended: N/A

Description/Impact/Update: Adopt a policy to allow residents to transfer between Section 8 and Section 9 programs within the OHA portfolio. Amend the current transfer policies to standardize the procedures across programs. Policy may include provisions such as the length of tenancy required to request a transfer voucher, impacts to the HCV wait list, and a cap on the number of transfer vouchers issued annually. Families may be required to complete a two-year tenancy in order to be eligible to request a transfer voucher from either the public housing or PBV program. In order to limit the impact on the HCV waitlist, the issuance of vouchers may be subject to a one-for-one policy whereby at least one or more new vouchers are issued to families selected from the HCV tenant-based waiting list for every Public Housing or PBV transfer voucher issued. In order to control demand, OHA is considering limiting the number of transfer vouchers available to no more than 10 percent (10%) of the total units in the Public Housing and PBV programs combined per year and the amount of transfer requests granted is subject to the Executive Director's discretion. OHA will also use this activity to allow moves from local, non-traditional programs (LNT) to the traditional section 8 and 9 authorized programs once a family has graduated from the LNT program and sufficiently demonstrated housing stability.

OHA used the activity in FY 2023 to move 14 households between public housing and an HCV or PBV due to confidential client emergency transfer (CCR), transfer due to a reasonable accommodation, maintenance, or rightsizing. This was an increase from FY 2022 because a greater number of the CCR requests moved within the HCV program, and more reasonable accommodations were requested.

Actual Non-Significant Changes: This activity was active during the fiscal year and remains ongoing. OHA had no non-significant changes to this activity.

Actual Non-Significant Changes: OHA had no non-significant changes for this activity.

Actual Changes to Metrics/Data Collection: No changes to metrics were included in the table below.

Actual Significant Changes; OHA had no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA had no challenges to report.

Standard HUD Metrics

HC #3: Decrease in Wait List Time

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on waitlist in months (decrease)	Average applicant time on waitlist prior to implementation of the activity (in months)	Expected applicant time on waitlist after implementation of the activity (in months) =6 months	Actual applicant time on waitlist after implementation of the activity (in months) = 8 months.	No.

HC #4: Displacement Prevention

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household give that type. Public Housing, PBV and HCV.	Households losing assistance prior to implementation of activity = 25 households	Expected households losing assistance after implementation of activity= 5 households	Actual households losing assistance after implementation of activity. Households = 0 Households.	Yes.

HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = number of inter-program transfers that occur as result (emergencies, Ras) = 15	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = number of inter-program transfers that occur as result (emergencies, Ras, VAWA) = 14	No.

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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Number of households receiving services aimed to increase housing choice (increase).	Households receiving services aimed to increase housing choice prior to implementation of the activity = Zero (0) households	Expected households receiving services aimed to increase housing choice after implementation of the activity = 15 households	Actual households receiving services aimed to increase housing choice after implementation of the activity = 14 households	No.
CE #5: Increase in Agency Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Rental revenue in dollars prior to implementation of the activity = \$35,201,999	Expected Rental revenue in dollars after implementation of the activity = \$1,500,000	Actual Rental revenue in dollars after implementation of the activity = \$46,364,749.	Yes.

MTW Activity #11-03: SRO/Studio Apartment Project-based Preservation Program

Year Approved: 2011

Year Implemented: 2018

Year Amended: N/A

Description/Impact/Update: Develop a PBV sub-program to award long-term housing assistance to Single Room Occupancy (SRO) and studio apartment developments. Based on local market conditions, OHA will extend assistance to programs that provide service enriched housing and those programs that solely provide the housing component given the high need for housing in Oakland.

Due to high market rate rents and very low inventory of affordable housing, hard to house populations are being adversely affected, as developers opt to convert SRO housing to other uses. In FY 2023, OHA continued subsidizing households with Board approved partners to provide housing assistance with qualified owners, property managers, and developers of service enriched rental housing through the Building Bridges – SRO local program. All providers had existing service enriched single occupancy housing units, which were targeted to serve special needs populations. OHA did not meet the benchmark of 254 households served as Coliseum Way and Piedmont Place, two developments consisting of 62 additional SRO Units using Homekey funding, were delayed.

East Bay Asian Local Development Corporation (EBALDC) Madrone Hotel

Madrone Hotel is a 32-unit Single Room Occupancy residential building which provided housing for 30 households, composed of 1 person, with incomes at or below 60% AMI. The property is regulated by the California Tax Credit Allocation Committee under the Low-Income Housing Tax Credit (LIHTC) program and is also regulated by the City of Oakland under the HOME program.

Services are provided at the Madrone Hotel through a .6 FTE Resident Service Coordinator. The Resident Services Coordinator provides support for the diverse group of low-income residents living at the Madrone Hotel including residents who were formerly homeless and/or facing barriers including physical disability or mental health issues. Some resident's struggle with habitability issues. The onsite services coordinator has assisted with providing cleaning products garbage bags and assistance with obtaining outside services if needed.

EBALDC San Pablo Hotel

San Pablo Hotel served an average of 102 residents every month and offers residents many supportive services from counseling to education and career supports. The Resident Services team provided individual support, like one-on-one counseling, to ensure residents remain housed. Resident Services additionally connected residents with resources, provided budgeting assistance, and worked with residents failing room inspections, and reached out to residents with lease violations. Basic supports and referrals for employment services were available to assist workable residents, based on individual interest and needs. Residents could access a computer lab to apply for work or to develop resumes.

Resources for Community Development (RCD) Harrison Hotel

Harrison Hotel is SRO Site and houses those transitioning from homelessness or those individuals who are homeless from shelters, the street or couch surfing, and individuals who are staying in units which are temporary housing. The population we serve are those individuals dealing with mental health issues, physical health issues, substance abuse issues, living with HIV/AIDS or a combination of any of the above.

The goal of the Harrison Hotel is to provide permanent supportive housing, stability and the opportunity to transition other housing, if so desired, and giving those housed a place to call home. Each resident has their own unit with a private and/or shared private bathroom. A shared community kitchen, two shared community room spaces and a community laundry room. These spaces allow for privacy, community sharing and a space they can each enter and use with freedom.

One of the challenges is the use of shared bathroom spaces. Each resident would prefer their own bathroom but as the building has been constructed this has not proved possible, but as time progresses the residents have learned to share the bathroom space and there are less conflicts. Harrison Hotel served an average of 18 residents every month, in SROs.

St. Mary Friendly Manor (SRO)

In December 2021, three plumbing issues erupted and required assessment of livability: a roof leak, corroded pipe on the third floor that leaked through acoustical tile on the first floor; and sewage seepage in the basement connection to the main. After making short-term repairs, St. Mary's Center staff made the decision to relocate six remaining program participants, placing all in transitional housing immediately, and securing permanent housing for all six by December 2022. Therefore, there were no active residents during this FY.

Homekey

Homekey Program Background

On September 9, 2021, the State of California Department of Housing & Community Development (State) issued a Notice of Funding Availability (NOFA) for the second round of its Homekey Program, making approximately \$1.45 billion in grant funding available to local public entities, including cities and counties, to sustain and rapidly expand housing for persons experiencing homelessness or at-risk of homelessness, and who are, thereby, inherently impacted by or at increased risk for medical diseases or conditions due to the COVID-19 pandemic.

On October 18, 2021, the City of Oakland Department of Housing and Community Development (DHCD), as the eligible applicant for the State's funding, issued a Homekey Request for Proposals

(RFP) to solicit proposals from prequalified project sponsors as prospective joint applicants for Homekey funding with DHCD.

On December 21, 2021, the Oakland City Council approved the Coliseum Way “project” to immediately move forward as co-applicant. The State is accepting applications on a rolling basis until May 2, 2022, or until funds are exhausted, whichever occurs first. The DHCD intends to jointly submit an application with project sponsors Danco Communities and Operation Dignity as soon as possible prior to January 31, 2022.

The program funds a capitalized operating reserve in an amount up to \$4,572,041 for the Homekey project, Coliseum Way, and up to \$4,905,755 for Homekey project, Piedmont Place, and up to \$3,226,453 for Homekey project, The Phoenix, subject to clearance under the National Environmental Policy Act (NEPA). These projects were approved in round 2 proposals submitted by the City of Oakland to the State of California Homekey Round II competition. Only the Coliseum Way project was successful in the Homekey Round II competition.

Piedmont Place

During the FY, Piedmont Place decided not to move further with the OHA partnership.

The Phoenix

The Phoenix did not receive Homekey funding as anticipated and had to restructure their financing. They have received CA State Housing Accelerator funds and received 4% Low Income Housing Tax Credits. The financing for the Phoenix closed after the FY.

Coliseum Way

The proposed conversion of the Inn by the Coliseum motel, located at 4801 Coliseum Way, into 36 Homekey units as permanent supportive housing (plus one manager’s unit), is a joint project of Danco Communities and Operation Dignity.

All units will target people experiencing homelessness earning no more than 30 percent AMI, and at least six units will target those who are chronically homeless. Referrals to Homekey units shall be made through the Coordinated Entry System (CES) for persons who are experiencing homelessness and 24 of the units will be SROs.

Project sponsors Danco and Operation Dignity intend to create a lounge area, community kitchen, office spaces for onsite support services and property management, as well as upgrades to the grounds including a dog walk and other landscaping utilizing DHCD and Homekey funds. In Oakland Housing Authority FY 2023 MTW Annual Plan Page 87 of 195 additions, the existing industrial laundry room will be converted into a laundry area accessible for tenants to use free of charge. At least 12 of the larger units will be upgraded to include full kitchenettes that will include a sink, refrigerator/freezer, and a cooktop. The sponsors are evaluating the potential of adding full kitchenettes to all units utilizing City and Homekey funds.

Due to delays in permitting with the building department Coliseum Way was not able to begin construction during the FY. Construction is anticipated to start early during the next FY.

Actual Non-Significant Changes: This activity was active during the fiscal year and remains ongoing. No non-significant changes occurred during the FY.

Actual Changes to Metrics/Data Collection: Changes to the metrics are included in the table below. There were no changes to the data collection methodology to report.

Actual Significant Changes: OHA had no significant changes to report for this activity.

Challenges in Achieving Benchmarks and Possible Strategies: Due to delays in permitting, one of the anticipated projects was unable to begin construction.

HC #4: Displacement Prevention

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity = 100	Expected households losing assistance/moving after implementation of the activity = Zero	Number of households who were prevented from losing assistance/moving after implementation of the activity = zero	Yes.

HC#1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of units of this type prior to implementation of the activity = Zero (0) units	Expected housing units of this type after implementation of the activity = 254 units (Building Bridges - (192 households) and Homekey, Coliseum Way and Piedmont Place – (62 households)	Number of housing units of this type after implementation of the activity = 150	No. With Friendly Manor out of commission due to damage from plumbing issues we were not able to meet the benchmark. Additionally, the Homekey projects were delayed, delaying 62 additional units.

HC#2: Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0) units	Expected housing units preserved after implementation of the activity = 254 units	Number of housing units preserved after implementation of the activity= 150 units	No. With Friendly Manor out of commission due to damage from plumbing issues we were not able to meet the benchmark. Additionally, the Homekey projects were delayed, delaying 62 additional units.

HC#5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit	Households able to move to a better unit and/or neighborhood of	Expected households able to move to a better unit and/or	Number of households able to move to a better unit and/or neighborhood	No. With Friendly Manor out of commission due to damage from plumbing

and/or neighborhood of opportunity as a result of the activity (increase).	opportunity prior to implementation of the activity = Zero (0) households	neighborhood of opportunity after implementation of the activity = 254 households	of opportunity after implementation of the activity = 150 households	issues we were not able to meet the benchmark. Additionally, the Homekey projects were delayed, delaying 62 additional units.
HC#7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = 254 households	Number of households receiving these services after implementation of the activity = 150 households	No. With Friendly Manor out of commission due to damage from plumbing issues we were not able to meet the benchmark. Additionally, the Homekey projects were delayed, delaying 62 additional units.

MTW Activity #11-05: PBV Transitional Housing Program

Year Approved: 2011
 Year Implemented: 2011
 Year Amended: N/A

Description/Impact/Update: Develop sub-programs modeled after the Project-Based Voucher program to allow for transitional housing opportunities at developments serving low-income special needs households who otherwise might not qualify for or be successful in the Public Housing and/or Section 8 programs.

Parents And Children Together (PACT)

This activity used established partnerships with the Alameda County Sheriff’s Office (ACSO), to facilitate the development of local, non-traditional housing programs like the Maximizing Opportunities for Mothers to Succeed (MOMS) initiative. This program offered service-enriched transitional housing support to formerly incarcerated mothers seeking to reunite with their children and deter recidivism. The Dads Acquiring and Developing Skills (DADS) program serves fathers exiting minimum security incarceration seeking to reunite with their children and families. Under the model used during the FY, the ACSO referred MOMS and DADS program participants to OHA for housing. OHA implemented the Parents and Children Together (PACT) program to provide transitional service enriched housing to both populations. In addition to the housing subsidy, the PACT program offered customized adult, family and youth case management, group counseling services, family activities and educational and employment development assistance to all participants as a condition for participation in the program.

Potential PACT participants applied and were screened while in custody at the Santa Rita jail and once accepted they completed a needs assessment and intake processing. Participants completed an 8-week gender specific educational component while in custody and created an Individual Action Plan (IAP) tailored to meet the needs of each participant. Once housed at



the PACT site, case managers worked with participants to complete their IAP using various supportive services for the participants and their children.

Along with the primary program partners Alameda County Sheriff's Office (ACSO) and the Alameda County Behavioral Health Care Services (ACBHS) Department, OHA continued to determine the strategic direction and led the multi-partner board to address program improvements. Additions to the program structure included a sober living agreement; an alumni participation agreement, stronger coordination of multi-agency intervention for lease non-compliance and additional on-site program activities to enhance parent/child engagement and workforce development for older youth and adults.



During FY 2023, the partnership with ACSO was terminated which has created some challenges for the program. After ACSO terminated the partnership, the Family and Community Partnerships department within OHA assisted PACT participants with delinquent rent resources, established payback agreements, and unit transfers for eligible participants. Additionally, FCP provided cleaning supplies, support resources, and moving materials for graduating participants.

Families assisted under this activity represent some of the local, non-traditional households served by OHA. Overall, on average, 6 families participated in the program per month with no new admissions during the FY. Of the nine families that participated at the beginning of the FY, four (4) graduated into stable housing and three (3) were terminated for not complying with program guidelines.

Through the PACT program resources, participants worked to become employed and increase their incomes through steady employment. The monthly average earned income, with one participant employed full time and 1 employed part time, was \$4,709.15, an increased average income from the last FY. OHA relied on its community partners to provide skill building and job development workshops that helped increase the employability of the PACT participants, and the team referred participants to the Workforce Development initiative within the OHA Family and Community Partnerships Department.



This activity was active during the fiscal year.

Actual Non-Significant Changes: OHA made no non-significant changes to report with this activity.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics. There were no changes to the data collection methodology to report.

Actual Significant Changes: OHA had no significant changes to report with this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA experienced challenges with families exiting the program without leaving the units. Due to eviction moratoriums and other challenges, families occupied units without remaining in the PACT program. OHA is investigating strategies to improve the administration of the program in terms of agreements versus leases and other options by examining implementation of these types of programs by other MTW agencies. Additional challenges arose due to the termination of the partnership with the Alameda County Sheriff's Office, as there will be no new participants without their referrals.

Standard HUD Metrics PACT Program

HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 13 households (PACT)	Households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 6 households	No.

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 13 households	Number of households receiving these services after implementation of the activity = 6 PACT households	No.

Standard OHA Metrics

Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of households who would not qualify for an available unit based on household composition = Zero (0) households	Expected housing units of this type after implementation of the activity = 13 households	Average number of households made available after implementation of this activity = 6 PACT households	No.

Increase in Household Income

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy in dollars prior to implementation of this activity = Zero (0)	Average earned income of households affected by this policy in dollars after implementation of this activity = \$10,000 (1040 hours at \$12.55 minimum wage) - PACT	Average earned income of households affected by this policy in dollars = \$4,709.15	No.

Increase in Household Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average amount of savings/escrow of households prior to this policy = Zero (0) in dollars.	Average amount of savings/escrow of households after implementation of this policy = \$100 in dollars	Amount of savings/escrow of households after implementation of this policy = \$36.87 dollars	No. No PACT families were enrolled in FSS, and therefore do not have escrow accounts with FCP.

Increase in Positive Outcomes in Employment Status

Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category:				
(1) Employed Full-Time	Number of participants employed at start of program = Zero (0)	Number of participants employed during program = Zero (0)	Number of participants employed during program = 1	Yes. Benchmark achieved.
(2) Employed Part-Time	Number of participants employed at start of program = Zero (0)	Number of participants employed during program = Two (2)	Number of participants employed during program = 1	No.
(3) Enrolled in an Educational Program	Number of participants in educational program at start of program = Zero (0)	Number of participants in educational program during program = Three (3)	Number of participants in educational program during program = 0	No.
(4) Enrolled in Job Training Program	Number of participants in Job Training program at start of program = Zero (0)	Number of participants in Job Training program during program = one (1)	Number of participants in Job Training program during program = 0	No.
(5) Unemployed	Number of participants unemployed at start of program = Eight (8)	Number of participants unemployed during program = six (6)	Number of participants unemployed during program = 4	Yes.
(6) Other – Drug Rehab Counseling	Number of participants in drug rehab = 0	Number of participants in drug rehab = 8	Number of participants in drug rehab = 0 participants	No.
Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.				

Households Removed from Temporary Assistance for Needy Families (TANF)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance = eight (8)	Number of households receiving TANF assistance = eight (8)	Number of households receiving TANF assistance during program = four (4)	No.
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Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Number of Households receiving services prior to implementation of the activity = Zero (0)	Expected number of Households receiving services after implementation of the activity = 13 households	Number of households receiving these services after implementation of the activity = 6 households	Yes.

Reducing Per Unit Subsidy Costs for Participating Households

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	OHA's current business system and partner does not have the capacity to accurately measure this metric. The partner agencies were not obligated to track this information during the fiscal year. OHA will explore a customization to track this information with the business system vendor.			

Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Number of households transitioned to self-sufficiency prior to implementation of this activity = Zero (0)	Expected number of households transitioned to self-sufficiency after implementation of this activity = 3 households	Number of households transitioned to self-sufficiency after implementation of this activity = 4 Households	Yes.

Building Bridges – Shared and Transitional Housing

In FY 2018, OHA implemented the Building Bridges (BB) initiative, which is comprised of several local programs. The BB-Shared and BB-Transitional local programs are designed to develop a model of targeting housing resources, alongside supportive services funding, toward a household to dramatically improve outcomes for the household through County, City and housing authority systems alignment. In FY 2023, existing partners continued to provide BB-Transitional housing to several hard to house populations. No new partners were added during the FY.



Operation Dignity (SRO-Transitional)

House of Dignity (585 8th St. in Oakland) provided shelter and transitional housing to male veterans who are homeless. They offered 30 beds of transitional housing and 15 of shelter, as well as 9 rooms dedicated to permanent housing (including HUD-VASH). This program offered up to two years of transitional housing combined with supportive services to help veterans exit to permanent housing and connect to community services that support their housing stability and began serving families through Building Bridges in November 2017. During FY 2023, the total dollar value of supportive services was \$561,008, which equates to \$28,050 average dollar amount of supportive services per participant.

City of Oakland - Families in Transition (FIT) - Transitional

The Families In Transition (FIT) Program is a 9 unit scattered site project for homeless families that is designed to assist them with transitioning to permanent housing. All families were referred to FIT through a Coordinated Entry process via the Family Front Door. Families enrolled in the project received various support services such as financial literacy, life skills and career development, designed to help them achieve self-sufficiency and get permanent housing quickly. Families received access to case management, employment support services, and to mental health and housing search assistance. Specific goals of the program included the following:

1. 80% of families exiting the program transition to permanent housing
2. 95% of all program participants exit to a known destination
3. 80% of the program participants have length of stays of less than or equal to nine months.
4. 50% of all participants who report they had no income upon program entry exit with an income.
5. 75% of clients who are in the program at the end of the contract period or who have exited during the contract period have maintained or increased their income during the program year.
6. 100% of all families in the program for at least 60 days have obtained or maintained non-cash mainstream benefits

FIT started serving families through Building Bridges in March 2018.

Peter Babcock House (Shared Housing)

Peter Babcock House assisted individuals by providing supportive, long-term housing and ongoing non-clinical case management, transportation, resource referral, and conflict resolution for individuals living at the home. Staff met weekly with each resident to assess any needs, check on progress toward goals, and provides resources to address any issues. Peter Babcock House received funds from HUDs Continuum of Care (CoC) grant and as a part of the CoC grant Satellite Affordable Housing (SAHA) began leasing vacancies through the Alameda County Coordinated Entry System (CES). Peter Babcock House began serving families in Building Bridges in April 2018. All 5 assisted families remained housed during the FY. During FY 2023, the total dollar value of supportive services was \$18,000, which equates to \$3,600 average dollar amount of supportive services per participant.

St. Mary's Presentation House (Shared Housing)

St. Mary's offered homeless seniors the experience and support of structured congregate housing to prepare for independent living and provided on-site support designed to help seniors maintain their physical and mental health and sobriety. Ninety-five percent of the seniors are over age 55 and are either at risk of or were homelessness. During the FY St. Mary's Center developed a 165-page resource manual to provide case managers with the necessary context of working with homeless seniors in West Oakland, with details on support for navigating vicarious trauma, burnout, and compassion fatigue. Program objectives were:

1. Conduct quality assessments and ensure entry into appropriate programs and services like HMIS, Coordinated Entry System, mainstream benefits, and healthcare.
2. Provide quality, consistent case management services starting with development of a customized assessment and action plan, supervised by the Clinical Director.
3. Weekly meetings between Case Manager and each participant to address ongoing needs, provide necessary support and check in on goals.
4. Aid development of life skills and regular habits such as grocery shopping, paying rent, establishing savings, cleaning, and tending to hygiene needs to set a foundation of self-care practices and responsibility for independent living.
5. Provide opportunities to practice building communication skills through weekly community meetings to discuss house needs, conflicts and appreciations.

St. Mary's Closer to Home (Shared Housing)

St. Mary Closer to Home offered homeless seniors the experience and support of structures congregate housing to prepare for independent housing and living. The program provided on-site support designed to help senior maintain their physical, mental health, and sobriety. 95% of the seniors were over 55 years old and received less than \$11,000 per year through SSI.

St. Mary's Center operates Closer to Home, a transitional housing facility with seven (7) single-room occupancy units, common kitchen and living areas, to support Seniors 55 years of age and older in becoming and remaining housed. In coordination with our robust case management and community center activities, transitional housing offers an important bridge to the primary goal – sustainable permanent housing.

The systemic challenges that are the most prevalent for the Seniors in Oakland are diverse, but they include:

1. Limited access to all types of housing: affordable permanent housing; emergency housing such as shelter; and transitional/interim/bridge housing.
2. High levels of chronic poverty including large numbers of Seniors living on low fixed incomes like Social Security income (SSI) and Social Security Disability Income (SSDI)
3. Social isolation and a lack of a significant family and friend's network.
4. High levels of physical illness in conjunction with low levels of consistent, affordable, and understandable medical care.
5. Mental health issues and substance use disorders often correlated to suffering from untreated trauma that occurred pre, during, and post homelessness and race-based traumatic stress due to the large racial disparity in homelessness.

Overall, St. Mary's Center transitioned 48 seniors in FY 2023 into permanent housing during the last fiscal year, which is 145% performance over the previous year, the total dollar value of supportive

services was \$171,865, which equates to \$24,644 average dollar amount of supportive services per participant.

St. Mary's began serving Building Bridges families in May 2018.

City of Oakland – Matilda Cleveland (Transitional Housing)

The Matilda Cleveland (MC) Program is a 14-unit project for homeless families designed to assist families with transitioning to permanent housing. All families were referred to MC through a Coordinated Entry process via the Family Front Door. Families enrolled in the project received various support services designed to help them achieve self-sufficiency and locate permanent housing quickly. Families received access to case management, employment support services and access to mental health and housing search assistance. During FY 2020 specific goals of the project were:

1. 80% of the MC THP families exit to permanent housing
2. 50% of the MC THP families have length of stays of less than or equal to six months
3. 95% of the MC THP families exit to known destinations
4. Of clients who are eligible for but not yet enrolled in mainstream benefits, 90% have started the enrollment process within 30 days of program entry
5. 80% of clients of clients who are in the program at the end of the contract period or who have exited during the contract period have obtained or maintained non-cash mainstream benefits.
6. 75% of clients who are in the program at the end of the contract period or who have exited during the contract period have maintained or increased their income during the program year

MC joined the Building Bridges program in March 2018.

Actual Non-Significant Changes: There were no non-significant changes during the FY.

Actual Changes to Metrics/Data Collection: There were no changes to the data collection methodology to report.

Actual Significant Changes: OHA had no significant changes during the FY for this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA continued to develop new methods to simplify data collection for partner agencies, but due to staffing shortages OHA received reports from 66% of our partners. The metrics are estimates based on the reports we received.

Standard HUD Metrics Building Bridges Program HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 61 households	Households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 38 households	No.

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 61 households	Number of households receiving these services after implementation of the activity = 38 households	No.

Standard OHA Metrics
Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of households who would not qualify for an available unit based on household composition = Zero (0) households	Expected housing units of this type after implementation of the activity = 61 households	Average number of households made available after implementation of this activity = 38 households	No.

Increase in Household Income

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy in dollars prior to implementation of this activity = \$0	Average earned income of households affected by this policy in dollars after implementation of this activity = 1040 hours at minimum wage (\$12.55) = \$10,000	Average earned income of households affected by this policy in dollars \$1,432	No, but this is only reporting about 70% of our partners.

Increase in Household Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average amount of savings/escrow of households prior to this policy = Zero (0) in dollars.	Average amount of savings/escrow of households after implementation of this policy = \$100 in dollars	Amount of savings/escrow of households after implementation of this policy = \$750 dollars	Yes, partners are reporting that participants have savings.

Increase in Positive Outcomes in Employment Status

Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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Report the following information separately for each category:			OHA was unable to track this information in FY 2022 but plans to implement in future FYs.	
(1) Employed Full-Time	Number of participants employed at start of program = Zero (0)	Number of participants employed during program = 0	Number of participants employed at during program = 4	Yes.
(2) Employed Part-Time	Number of participants employed at start of program = Zero (0)	Number of participants employed during program = 1	Number of participants employed during program = 5	Yes.
(3) Enrolled in an Educational Program	Number of participants in educational program at start of program = Zero (0)	Number of participants in educational program during program = 2	Number of participants in educational program during program = 0	No.
(4) Enrolled in Job Training Program	Number of participants in Job Training program at start of program = Zero (0)	Number of participants in Job Training program during program = 1	Number of participants in Job Training program during program = 0	No.
(5) Unemployed	Number of participants unemployed at start of program = 28	Number of participants unemployed during program = 6	Number of participants unemployed during program = 29	No.
(6) Other – Drug Rehab Counseling	Number of participants in drug rehab = 0	Number of participants in drug rehab = 8	Number of participants in drug rehab = 5	No.
Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.				

Households Removed from Temporary Assistance for Needy Families (TANF)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance = zero (0)	Number of households receiving TANF assistance after implementation of this activity = 8	Actual number of households receiving TANF assistance after implementation of this activity = zero	No

Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Number of Households receiving services prior to implementation of the activity = Zero (0)	Expected number of Households receiving services after implementation of the activity = 61 households	Number of households receiving these services after implementation of the activity = 23 households	No.

Reducing Per Unit Subsidy Costs for Participating Households

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars before implementation = Zero	Expected average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars after implementation = \$908	Actual average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars = \$0 (none of the households transitioned to a traditional subsidy - \$897 is the subsidy amount paid through the local non-traditional program)	No.
Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Number of households transitioned to self-sufficiency prior to implementation of this activity = Zero (0)	Expected number of households transitioned to self-sufficiency after implementation of this activity = 20 households	Number of households transitioned to self-sufficiency after implementation of this activity = 12 Households	No.

MTW Activity #10-01: Specialized Housing Programs

Year Approved: 2010

Year Implemented: 2010

Year Amended: N/A

Description/Impact/Update: In partnership with the Alameda County Sheriff's Office (ACSO), OHA operated the PACT program, which accepted referrals from the MOMS and DADS programs operated by ACSO. This activity increased the allocation of resources to the PACT program to improve outcomes and enhance program coordination among partners. Recently, the ACSO partnership was terminated.

OHA partners with many local agencies to assist hard to house populations that leverage their own funds to provide excellent customer care with the help of OHA. OHA created the PACT program and implemented this activity in conjunction with Activity #11-05, which has expanded to include Building Bridges partners. The partners, established in Activity #11-03, #11-05, and #10-06, provide supportive services and leveraged funds to provide additional assistance to participants of the programs. These funds were critical to the individual successes through these local programs.

In FY 2023, OHA collaborated with community partners that dedicated staff to provide on-site case management, and training and operational support funding. OHA exceeded the expected benchmark due to expansion of this program to all local partners. \$2,309,865 was leveraged by local partners for

salaries, operating costs and supports, and services rendered, exceeding the expected \$398,315. This reporting was informed by reports from 45% of local partners.

Actual Non-Significant Changes: OHA had no non-significant changes to this activity.

Actual Changes to Metrics/Data Collection: Previously, this activity was used to measure one partner, during the FY OHA expanded the reporting to all local partners to provide more comprehensive data.

Actual Significant Changes: OHA had no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not have challenges to report with this activity.

Standard HUD Metrics				
CE #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars) = Zero (0)	Amount leveraged after implementation of the activity (in dollars) = \$245,000	Actual amount leveraged after implementation of the activity = \$2,309,865	Yes, exceeded the benchmark due to expansion of the activity to more partners.

MTW Activity #10-02: Program Extension for Households Receiving Zero HAP

Year Approved: 2010

Year Implemented: 2010

Year Amended: N/A

Description/Impact/Update: Modify the HCV program rules to allow participants receiving a Housing Assistance Payment (HAP) of zero (\$0) to remain in the program for up to 12 months before being terminated from the program. The baselines for this activity are set at zero given that existing program regulations require all families that reach the zero HAP status are terminated after six months. Over the course of the Fiscal Year, 61 families are receiving zero HAP, with 14 families using the safety net of the additional 6 months on the program to maintain their income stability. Thirteen (13) Families using the safety net of the additional 18 months on the program to maintain their income stability. During the year, 216 families have dropped off zero hap status and are receiving assistance due to income changes and rent increases. Sixty-five (65) families achieved self-sufficiency as defined by this activity, by exiting the HCV program after being at zero HAP for 12 and 24 months. The outcomes demonstrate that while households can benefit from the protections provided under this activity, the majority of families return to subsidy due to various reasons and do not exit the program to “self-sufficiency” as it is defined. With the extremely competitive and expensive rental market in the Bay Area, families seem to opt for decreasing income or changing family composition over exiting the program. This outcome demonstrates the need for this activity, especially in times of increasing rents and a rental market with low inventory.

Actual Non-Significant Changes: OHA had no non-significant changes to this activity.

Actual Changes to Metrics/Data Collection: There were no changes to the metric/data collection methods.

Actual Significant Changes: OHA had no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA continues to research strategies that will encourage families to utilize the extension provided by the activity and achieve economic self-sufficiency by graduating and exiting from the Section 8 program. Given the very expensive housing market in Oakland, participants are afraid to leave the safety net of the option of continuing subsidy behind. Referrals to OHA's Family and Community Partnerships Department are continuing to provide support and services to achieve self-sufficiency.

Standard HUD Metrics				
SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars). \$47,711 for 109 households	Expected average earned income of households affected by this policy after implementation of the activity (in dollars) = \$47,711 (0% increase)	Actual average income of \$74,097	Yes.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance prior to implementation of this activity = 11 households	Number of households receiving TANF assistance after implementation of this activity = 5 (45% decrease)	Number of Households receiving TANF = 6 households	No.
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average amount of Section 8 and/or 9 subsidy per household prior to implementation of this policy in dollars = \$995	Average amount of Section 8 and/or 9 subsidy per household after implementation of this policy in dollars = \$0 (100% decrease)	Average amount of Section 8 and/or 9 subsidy per household after implementation of this policy in dollars = \$0	Yes.
SS #7: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Average PHA rental revenue/HAP in dollars (increase) for the year	Rental revenue prior to implementation of the activity (in dollars) = \$4,343,040	Expected rental revenue after implementation of the activity (in dollars) = \$0	Actual rental revenue after implementation of the activity (in dollars) = \$10,991,459	Yes.
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SS #8: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Number of households transitioned to self-sufficiency (self-termination from the program) = 10 families	Number of households transitioned to self-sufficiency = 10 families	Actual number of households transitioned to self-sufficiency = 65	Yes. The benchmark was achieved and greatly exceeded.

Standard OHA Metrics

Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Number of households receiving services aimed to increase self-sufficiency prior to implementation of this activity = Zero (0) households	Number of households receiving services aimed to increase self-sufficiency after implementation of this activity = 10 households	Actual number households receiving services aimed to increase self-sufficiency after implementation of this activity = 0	No.

MTW Activity #10-03: Combined PBV HAP Contract for Non-Contiguous Scattered Sites

Year Approved: 2010
Year Implemented: 2010
Year Amended: N/A

Description/Impact/Update: Modify PBV program rules to allow HAP contracts to be executed for non-contiguous buildings. The anticipated impacts are to reduce agency administrative costs associated with staff time and preparing, executing, and managing the HAP contracts. In FY 2023 OHA did not utilize this activity.

Actual Non-Significant Changes: There were no non-significant changes to the activity.

Actual Changes to Metrics/Data Collection: There were no changes to the metrics or data collection methods.

Actual Significant Changes: OHA had no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA had no challenges to report at this time.

Standard HUD Metrics				
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$70 (staff salary/hour) * 80 hours = \$5,600	Expected cost of task after implementation of the activity = \$70 * 0 hours = \$0	Task was not used in FY 2023.	N/A
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 6 hours/contract * 8 contracts = 80 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 10 hours/contract * 0 contracts = 0 Hours	Task was not used in FY 2023.	N/A

MTW Activity #10-04: Alternative Initial Rent Determination for PBV Units

Year Approved: 2010

Year Implemented: 2010

Year Amended: N/A

Description/Impact/Update: Modify the PBV program requirement to use a state certified appraiser to determine the initial contract rent for each PBV project. Under this activity, initial contract rents are determined using a comparability analysis or market study certified by an independent agency approved to determine rent reasonableness for OHA-owned units. In addition, the definition of PBV "project" is expanded to include non-contiguous scattered sites grouped into Asset Management Properties (AMPs). Initial PBV contract rents are determined for each bedroom size within an AMP. The rent established for a two-bedroom unit is applicable to all two-bedroom units within an AMP and so on for all bedroom sizes.

Actual Non-significant Changes: This activity was not used during FY 2023.

Actual Changes to Metrics/Data Collection: OHA did not use this activity in FY 2023 for the disposition of public housing units as anticipated.

Actual Significant Changes: There were no significant changes to report.

Challenges in Achieving Benchmarks and possible strategies: The activity is on hold until OHA completes the conversion process for its public housing units. The activity will remain inactive until OHA receives approval of the disposition application and begins conversion of the units to the project-based voucher program.

CE #1: Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$1,400 x 50 projects = \$70,000	Expected cost of task after implementation of the activity = \$2,200 * 0 AMP areas = \$0	Activity was on hold in FY 2023.	N/A.

CE #2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 4 hours/contract * 50 contracts = 200 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 10 hours/contract * 0 contracts = 0 Hours	Activity was on hold in FY 2023.	N/A.

HC #2: Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0)	Expected housing units preserved after implementation of the activity = 0 units preserved	Activity was on hold in FY 2023.	N/A.

HC #4: Displacement Prevention

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number) = 60 units	Expected households losing assistance/moving after implementation of the activity (number) = Zero (0)	Activity was on hold in FY 2023.	N/A.

MTW Activity #10-05: Acceptance of Lower HAP in PBV Units

Year Approved: 2010
 Year Implemented: 2010
 Year Amended: N/A

Description/Impact/Update: As a result of disposition, some households may meet the definition of “over-housed” based on differences in the occupancy policies in the public housing and HCV programs. In these situations, this activity allows the landlord or management agent to accept a lower HAP based on the appropriate number of bedrooms for the family as opposed to the actual number of bedrooms in the unit. OHA and PBV owners also use this activity to house families in units when there are no families on the waitlist that qualify for the size units that are available. This activity will apply to RAD voucher holders to ensure access to housing for families impacted by disposition and to preserve affordable units for families whose subsidy standards are less than the PBV unit sizes.

This activity was initiated in FY 2010 as a result of the conversion of public housing scattered site units to the PBV program. Families in former public housing scattered sites were allowed to remain in place with TPV assistance, which did not require enforcement of the minimum number of family members per bedroom size, as was the case with PBV units. This activity continues to be used for the former Public Housing sites, and for PBV sites to reduce vacancies when a smaller unit is unavailable and there are no appropriately sized families on the waitlist.

In FY2023, OHA utilized this activity in five instances. In two instances, the families qualified for a one-bedroom unit, while residing in a two-bedroom unit. By utilizing this activity, the owner was offered to not displace the family and instead accept one-bedroom subsidy.

In three other instances, the families qualified for a two-bedroom unit while residing in a three-bedroom unit.

The total HAP amount, if this activity was not utilized, over FY 2023, would have been \$156,312. By utilizing this activity, OHA, paid \$118,872 for the five units. The difference is \$37,400.

Actual Non-Significant Changes: There were no non-significant changes to report for this activity.

Actual Changes to Metrics/Data Collection: There were no changes to the data collection methodology to report.

Actual Significant Changes: There were no significant changes to report for this activity.

Challenges in Achieving Benchmarks and Possible Strategies: There were no challenges or strategies to report.

HC #2: Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0)	Expected housing units preserved after implementation of the activity = 0 units preserved	Actual housing units preserved after implementation of the activity = 5 units preserved	Yes.
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SS #6: Reducing Per Unit Subsidy Costs for Participating Households

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). = \$645	Expected average subsidy per household affected by this policy after implementation of the activity = \$1,645.	Actual average subsidy per household affected by this policy after implementation of the activity = \$1,981.	No.

HC #4: Displacement Prevention

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number) = 0 units	Expected households losing assistance/moving after implementation of the activity (number) = Zero (0) units	Actual households losing assistance/moving after implementation of the activity (number) = 5	Yes

MTW Activity #10-06: Local Housing Assistance Program

Year Approved: 2010
Year Implemented: 2010
Year Amended: N/A

Description/Impact/Update:

LHAP

The Local Housing Assistance Program (LHAP) activity through initiatives like the Sponsor Based Housing Assistance Program (SBHAP) provides support to households that might not qualify for or be successful in the traditional Public Housing and/or Section 8 programs. LHAP provides subsidies to eligible households and to partnering agencies operating service-enriched housing for low-income households with special needs. LHAP programs serve families in partnership with the City of Oakland's Department of Human Services and the Oakland PATH Rehousing Initiative. LHAP programs leverage the expertise and experience of the non-profit, community-based service providers to provide rental housing assistance through the form of rental subsidies, utility assistance, security deposits, etc. to individuals who come from homeless encampments or are exiting the criminal justice system or are emancipated foster youth.

Originally, 44 households were on this program. During FY 2023, only 10 households remained of the original LHAP families, and 5 families elected to take their voucher and move.

SBHAP

OHA required that SBHAP program participants to pay no more than 30% of their income towards rent, participants must meet the same income limits as the HCV program, and they must pass federal immigration eligibility requirements. All housing units subsidized must were required to meet the HQS. Participant families were assisted by providers contracted by the City of Oakland and received supportive services along with the housing assistance offered under the activity. OHA's contract with the City leveraged resources, expertise, and community connections to deliver housing related services to, on average, 87-100 hard-to-house households on an annual basis in Oakland. OHA implemented a Step-Down program to allow program participants that have been stably housed for more than a year to transition to an HCV. Over the course of the FY, an average of 114 households were served per month. Overall, no households transitioned from SBHAP to an HCV. In June 2020, the Board of Commissioners increased the funding to \$3,081,093 for FY 2021 to serve an additional 40 homeless families with children. This represents a 35% increase in funding for this program, and we saw a 25% increase in families served under this program from 91 in FY 2022 to 114 in FY 2023. While the number of families increased the City and partners had difficulty executing on this additional funding to serve an increase number of families. Staff retention and enrollment were challenges that were exacerbated by COVID.

First Place for Youth (FPFY) supported the young adults in the SBHAP program with a variety of supportive services that focused on education and employment. The goal of the My First Place program was to help youth access the community resources available to them. Education and Employment Specialists (EES) worked closely with the youth to help them get employment in their chosen field and to gain hands on experience.

In addition to the EES, each young adult received coaching from a trauma-trained, strength-based Youth Advocate (YA) that they worked with weekly. YAs assisted the young adult participants to make sure that they are practicing self-care and being mindful of their emotions and reactions to strong emotions in their daily lives. YAs worked closely to determine if youth participants needed additional mental health support or community resources and helped connect them to the resources to best allow them to feel supported and balanced, so they can focus on their education and employment goals.

BB-CalWORKs

The Building Bridges – CalWORKs is designed to provide a stable shallow housing subsidy for 1-2 years for ACSSA clients who are actively engaged in a plan to achieve self-sufficiency. Specifically, the program serves employable, formerly homeless CalWORKs clients with the goal of stabilizing housing and improving outcomes for families and children. OHA and ACSSA have a referral process, billing procedures and forms and reporting requirements. ACSSA provides wrap around case management services to address employment barriers and assist with access to other needed community resources. Upon successful program completion, program participants may be referred to eligibility screening for an HCV. During FY 2023, this program served an average of 11 families per month. Due to decline in utilization, this program will likely be retooled for future use.

BB-THP+

The Building Bridges – Transitional Housing Plus (THP+) program is a short term five-year program for up to 50 participants. The short-term assistance payment phases down funding in year four and year five. Roommate living arrangements are allowed. The service provider is responsible for ensuring that participants and units meet program eligibility requirements, and the service provider will provide program participants through direct referral to OHA. During FY 2023, OHA served approximately 9 families per month. Due to decline in utilization, this program will likely be retooled for future use.

Families assisted under this activity represent several of the local, non-traditional households served by OHA through its MTW authority. On average, the SBHAP program served 114 families per month. The goal of SBHAP is to serve up to 180 families on average per month and the program experienced challenges with staff turnover and finding applicants that meet all the criteria of the programs.

Actual Non-Significant Changes: No non-significant changes for this activity.

Building Bridges Key To Home Program (BB-KTH)

Description

OHA partnered with the Oakland Affordable Housing Preservation Initiative (OAHPI), Alameda County Health Care Services (HCSA) and Abode Services to provide property-based housing assistance to up to 23 families through a new local housing assistance pilot program. The program provided a coordinated exit for families with children out of Project Roomkey interim housing into more long term supportive housing managed by a third-party homeless service provider and property manager contracted by OAHPI to provide resident community services and property management. The program has a tiered tenant rent structure based on Area Median Income (AMI). The AMI categories for program participant rents are as follows with all families being at least at 50% AMI or below:

AMI Range	Flat Rent Amount **
• 0% - 5%	\$50
• 6%-10%	\$100
• 11%-19%	\$200
• 20%-39%	\$300
• 40%-50%	\$400

** Subject to change based on Utility Allowance review (will not exceed 30% of participant income)

Program participants pay a flat rent based on AMI income category and sign an annual lease. Participants are re-certified for AMI status bi-annually. Supportive services and case management are provided by HCSA and Housing Consortium of the East Bay (HCEB). OHA plans to continue the program for a minimum of 15 years with an option to extend for 5 years, provided funding availability. OHA projects the costs to provide rental assistance for 15 years to 23 households to be \$9,279,000. If the program is extended another 5 years, the projected overall costs are \$12,372,000. Initial funding will be provided by CARES Act and MTW funds and subsequent years will be funded through MTW single fund flexibility.

Initially, vacant units are occupied by eligible Project Roomkey households and subsequently by Oakland families with children under 18 using the County's coordinated assessment and entry system that prioritizes eligible tenants based on criteria other than "first-come-first-serve", including, but not limited to, the duration or chronicity of homelessness, vulnerability to early mortality, or high utilization of crisis services.

The range of services that the County offers include but are not limited to:

1. General services including outreach, goal planning, information and referral, Case management, living skills assistance, coordination of services, conflict resolution, housing retention skills development and eviction prevention;
2. Benefits/money management assistance including assistance applying for public benefit programs, referrals for payee services, credit counseling referrals, civil legal assistance linkages, and assistance with budgeting and establishing bank accounts;
3. Integrated, co-occurring treatment resources that include individualized assessment and treatment planning and coordinated care for physical health/medical, mental health, and substance use conditions;
4. Linkages and coordination with primary care and medical providers, health education, HIV/AIDS care and referrals;
5. Mental health services including individual assessment and counseling, group counseling, psychiatric care and referrals, referrals and advocacy;
6. Substance use/abuse services including individual assessment and counseling, group counseling, referrals to treatment programs and ongoing support;
7. Employment/vocational/educational training, on and off-site training, educational opportunities, financial assistance for work training at education, and work opportunities connected with the services program; and
8. Community building/social activities including peer support, outings and field trips, organizing/political activities, consumer/tenant involvement opportunities and support;
9. Adequate and convenient transportation to off-site services

Utilization of services is voluntary for participants of the pilot program.

During FY 2023, OHA served on average 20 families per month through BB-KTH.

Actual Changes to Metrics/Data Collection: Changes in metrics are included in the table below. There were no changes to the data collection methodology to report.

Actual Significant Changes: OHA made no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies:

SBHAP

During the FY, it was challenging to maintain and recruit new landlord participants. Partner agencies worked closely with OHA, clients and landlords to ensure that any leasing challenges were addressed in a timely manner. Convincing existing landlords to enter the Housing Choice Voucher program was difficult for partners. Additionally, OHA found that tenants were hesitant to accept a voucher because it would require transition to new case management and any change to their stable environments was a cause for anxiety. Even with these challenges, our partners were able to increase utilization 25% since last FY.

BB-THP+

Challenge: The initial HQS fail rate was roughly 75% for units enrolled in the program, which caused enrollment delays. FPFY and Abode worked directly to remediate small repairs, but substantial problems required coordination with the property owner for resolution. In response to this issue, FPFY

implemented, using guidelines and training provided by OHA, a pre-inspection protocol to ensure units were ready for HQS inspections and to remediate issues in order to avoid chronic unit fails. Additionally, the team assigned a housing specialist to help facilitate housing-related issues.

FPFY and Abode began unit searches and procurement 60-90 days prior to program enrollment to try and address the dearth of willing landlord participants challenge. Other challenges:

- HQS Inspections
 - Delay between pre-inspection request by FPFY and the time it got to OHA
 - 30 days to request HQS typically expired before OHA inspected, which caused the process to start)
 - Halted inspections for occupied units were a challenge both before and during the pandemic
- Identification of available units for (Abode's Youth)

CalWORKs

Challenges in meeting the projected benchmarks that caused delays involved eligibility processing delays where documentation for verification of income and other household members was delayed and to address this issue, ACSSA is working to streamline the process. As with all the programs, finding landlords to accept program participants and OHA subsidies in a tight rental market is an issue. ACSSA worked to negotiate lower rents and increased landlord outreach to facilitate housing options for program participants. The eligibility process has proven slow with participants in obtaining eligibility requirements. Participants must stay employed to remain in the program and challenging job environments during the pandemic has jeopardized eligibility for some participants. OHA continued to see challenges for participants maintaining employment related to COVID-19 job losses.

Additionally, the potential clientele for both CalWORKs and THP+ express they are no longer interested in leasing housing in Oakland.

Homekey

Homekey Program Background

On September 9, 2021, the State of California Department of Housing & Community Development (State) issued a Notice of Funding Availability (NOFA) for the second round of its Homekey Program, making approximately \$1.45 billion in grant funding available to local public entities, including cities and counties, to sustain and rapidly expand housing for persons experiencing homelessness or at-risk of homelessness, and who are, thereby, inherently impacted by or at increased risk for medical diseases or conditions due to the COVID-19 pandemic.

On October 18, 2021, the City of Oakland Department of Housing and Community Development (DHCD), as the eligible applicant for the State's funding, issued a Homekey Request for Proposals (RFP) to solicit proposals from prequalified project sponsors as prospective joint applicants for Homekey funding with DHCD.

On December 21, 2021, the Oakland City Council approved the Coliseum Way "project" to immediately move forward as co-applicant. The State is accepting applications on a rolling basis until May 2, 2022, or until funds are exhausted, whichever occurs first. The DHCD intends to jointly submit an application

with project sponsors Danco Communities and Operation Dignity as soon as possible prior to January 31, 2022.

The program funds a capitalized operating reserve in an amount up to \$4,572,041 for the Homekey project, Coliseum Way, and up to \$4,905,755 for Homekey project, Piedmont Place, and up to \$3,226,453 for Homekey project, The Phoenix, subject to clearance under the National Environmental Policy Act (NEPA). These projects were approved in round 2 proposals submitted by the City of Oakland to the State of California Homekey Round II competition. Only the Coliseum Way project was successful in the Homekey Round II competition.

Piedmont Place

During the FY, Piedmont Place decided not to move further with the OHA partnership.

The Phoenix

The Phoenix did not receive Homekey funding as anticipated and had to restructure their financing. They have received CA State Housing Accelerator funds and received 4% Low Income Housing Tax Credits. The financing for the Phoenix closed after the FY.

Coliseum Way

The proposed conversion of the Inn by the Coliseum motel, located at 4801 Coliseum Way, into 36 Homekey units as permanent supportive housing (plus one manager's unit), is a joint project of Danco Communities and Operation Dignity.

All units will target people experiencing homelessness earning no more than 30 percent AMI, and at least six units will target those who are chronically homeless. Referrals to Homekey units shall be made through the Coordinated Entry System (CES) for persons who are experiencing homelessness and 24 of the units will be SROs.

Project sponsors Danco and Operation Dignity intend to create a lounge area, community kitchen, office spaces for onsite support services and property management, as well as upgrades to the grounds including a dog walk and other landscaping utilizing DHCD and Homekey funds. In Oakland Housing Authority FY 2023 MTW Annual Plan Page 87 of 195 additions, the existing industrial laundry room will be converted into a laundry area accessible for tenants to use free of charge. At least 12 of the larger units will be upgraded to include full kitchenettes that will include a sink, refrigerator/freezer, and a cooktop. The sponsors are evaluating the potential of adding full kitchenettes to all units utilizing City and Homekey funds.

Due to delays in permitting with the building department Coliseum Way was not able to begin construction during the FY. Construction is anticipated to start early during the next FY.

Standard HUD Metrics				
HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available	Number of households who would not qualify for an available unit based on	Expected housing units of this type	Actual housing units of this type after implementation of the activity = 10	No. These numbers are meant to decline as participants opt to move.

for households at or below 80% AMI as a result of the activity (increase) LHAP	household composition = Zero (0)	after implementation of the activity = 13		
SBHAP	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 140	Actual housing units of this type after implementation of the activity = 114	No.
BB-THP+	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 35	Actual housing units of this type after implementation of the activity = 11	No.
BB-CalWORKs	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 35	Actual housing units of this type after implementation of the activity = 9	No.
BB-KTH pilot	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 23	Actual housing units of this type after implementation of the activity = 20	No.
Homekey-Coliseum Way, Piedmont Place, and Phoenix	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 118	Actual housing units of this type after implementation of the activity = 0	No, two of these projects were not finalized, and one was delayed due to permitting issues.
Total number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	Total number of households who would not qualify for an available unit based on household composition = Zero (0)	Total expected housing units of this type after implementation of the activity = 341	Total housing units of this type after implementation of the activity = 164	No.

HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). LHAP	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 16	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 10	No.

Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). SBHAP	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 145	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 114	No.
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). BB-THP+	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 20	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 11	No.
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). BB-CalWORKs	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 20	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 9	No.
BB-KTH pilot	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 23	Actual housing units of this type after implementation of the activity = 20	No.
Homekey-Coliseum Way, Piedmont Place and Phoenix	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 118	Actual housing units of this type after implementation of the activity = 0	No, there were permitting delays during the FY that prevented completion of these units.
Total number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Total households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Total expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 341	Total actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 164	No. Partners struggled to find applicants and permitting delays led to less families served.
HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Number of households receiving services aimed to increase housing choice (increase). LHAP	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 16	Actual number of households receiving these services after implementation of the activity =10	No.
Number of households receiving services aimed to increase housing choice (increase). SBHAP	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity =145	Total actual number of households receiving these services after implementation of the activity = 114	No
Number of households receiving services aimed to increase housing choice (increase). BB-THP+	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity =20	Total actual number of households receiving these services after implementation of the activity =11	No.
Number of households receiving services aimed to increase housing choice (increase). BB-CalWORKs	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity =20	Total actual number of households receiving these services after implementation of the activity = 9	No.
Households receiving this type of service prior to implementation of the activity BB-KTH pilot	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 23	Total actual number of households receiving these services after implementation of the activity = 20	No.
Households receiving this type of service prior to implementation of the activity Homekey-	Households receiving this type of service prior to implementation of the activity= Zero	Expected number of households receiving these services after implementation of the activity = 118	Total actual number of households receiving these services after implementation of the activity = 0	No, there were permitting delays during the FY that prevented completion of these units.
Total number of households receiving services aimed to increase housing choice (increase).	Total households receiving this type of service prior to implementation of the activity = Zero (0)	Total expected number of households receiving these services after implementation of the activity =341	Total actual number of households receiving these services after implementation of the activity = 164	No. Partners struggled to find applicants and permitting delays led to less families served.

MTW Activity #10-08: Redesign FSS Program

Plan Year Approved: 2010

Plan Year Implemented: 2021

Description/Impact/Update: OHA completed the redesign of the Family Self-Sufficiency (FSS) program building on best practices in the industry and, where applicable, working in tandem with other community-based programs and initiatives. OHA will exclude all earnings above \$480 per year for the Head of Household (HOH) or spouse/co-head+ during the first two years of FSS participation if the HOH or spouse is attending school full-time, analogous to the current exclusion for students. This is only effective for new enrollees. OHA plans to use this activity for RAD voucher holders.

OHA has implemented a new method for calculating escrow credit. Escrow credit calculations are now based on an earned income range for the household. The below schedule indicates ranges for earned income corresponding with the escrow credit a household will receive as an FSS participant. This simplifies the escrow calculation, currently a 22-step calculation process, and is complicated to explain to residents and to audit. See Table A below:

\$10,000 - \$14,999	\$50
\$15,000 - \$19,999	\$75
\$20,000 - \$24,999	\$100
\$25,000 - \$29,999	\$125
\$30,000 - \$34,999	\$150
\$35,000 - \$39,999	\$175
\$40,000 - \$44,999	\$200
\$45,000 - \$49,999	\$225
\$50,000 - \$54,999	\$250
\$55,000 - \$59,999	\$275
\$60,000 - \$64,999	\$300
\$65,000 - \$69,999	\$325
\$70,000 - \$74,999	\$350
\$75,000 - \$79,999	\$375
\$80,000 - \$84,999	\$400
\$85,000 - \$89,999	\$425
\$90,000 - \$94,999	\$450
\$95,000 - \$99,999	\$475
\$100,000 -Above	\$500

To widen the reach of the FSS program, housing program participants in MTW local programs can participate in the redesigned FSS program. Programs such as PACT (Activity 11-05) have supportive services to facilitate job training and workforce development skills and can benefit from FSS services and escrow accumulation. Residents that are managed by third-party property managers in mixed-finance sites will be allowed to apply for FSS participation.

During FY 2023, OHA concluded work with our business software vendor on the custom programming needed to implement the FSS redesign. OHA has implemented the necessary changes to the business software and began enrolling program participants effective 4/1/2023.

OHA continued planning to determine the most effective method to allow public housing residents from third-party managed properties to enroll in the FSS program. These properties use business software that does not administer the FSS program. OHA will continue to plan and research the most effective method to allow these residents to participate effectively.

In accordance with the Final Rule, effective June 17, 2022, implementing the re-authorization of the FSS program, OHA updated its FSS Action Plan to incorporate the required changes, and received HUD approval in December 2022. As a result, OHA implemented the modified escrow schedule, HOH/Co-HOH/Spouse full-time student exclusion, and the ability for program participants in MTW local non-traditional programs to enroll in FSS in Q4 of FY 2023.

Actual Non-Significant Changes: There were no non-significant changes.

Actual Changes to Metrics/Data Collection: Standard metrics for the activity are reflected in the table below. There are no planned changes to metrics or data collection.

Actual Significant Changes: There were no significant changes.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not have challenges to report with this activity.

SS #1: Increase in Household Income

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars). \$26,317 for 188 households	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars) = \$27,632.85 (5% increase)	Actual average earned income of households affected by this policy prior to implementation of the activity (in dollars) = \$14,852.34	No. Families began enrollment 4/2023.

SS #2: Increase in Household Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average escrow of households affected by this policy in dollars (increase).	Average escrow of households affected by this policy prior to implementation of the activity (in dollars). \$5,089 for 184 households	Expected average escrow of households affected by this policy prior to implementation of the activity (in dollars) = \$5,343.45 (5% increase)	Actual average escrow of households affected by this policy prior to implementation of the activity (in dollars) = \$30.50	No. Families began enrollment 4/2023.

SS#3: Increase in Positive Outcomes in Employment Status

Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category:				

(a) Employed Full-Time	67 participants	10 participants	14 participants	Yes
(b) Employed Part-Time	30 participants	20 participants	5 participants	No
(c) Enrolled in an Educational Program	16 participants	10 participants	2 participants	No
(d) Enrolled in Job Training Program	1 participant	5 participants	2 participants	No
(e) Unemployed	92 participants	10 participants	22 participants	Yes
(f) Other-Drug Rehab Counseling	0 participants	0 participants	0 participants	Yes

Percentage of total work-able households in <<category >> prior to implementation of activity (percent). This number may be zero.

Unknown

SS#4: Households Removed from Temporary Assistance for Needy Families (TANF)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF prior to implementation of this activity = 21 households	Number of households receiving TANF after implementation of this activity = 17 households	Actual number of households receiving TANF after implementation of this activity= 22 Households	No

SS#5: Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Number of households receiving services aimed to increase self-sufficiency prior to implementation = 186 households	Number of households receiving services aimed to increase self-sufficiency after implementation = 40 households	Actual number of households receiving services aimed to increase self-sufficiency after implementation = 41 households	Yes

SS #6: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Number of households transitioned to self-sufficiency prior to implementation of this activity = 15 households	Number of households transitioned to self-sufficiency after implementation of this activity = 0 households	Actual number of households transitioned to self-sufficiency after implementation of this activity= 0 households	Yes

MTW Activity #10-09: Altered Minimum Stay Requirement in PBV units

Year Approved: 2010
Year Implemented: 2010
Year Amended: 2019

Description/Impact/Update: Allows OHA to alter the 12-month minimum stay requirement for tenants in PBV units. Under the existing PBV regulations, households must complete a one-year tenancy in the unit before they can request a tenant-based voucher and move with continued assistance. If a voucher or comparable tenant-based assistance was not available, OHA gave the family priority to receive the next available opportunity for continued tenant-based rental assistance. This activity allowed OHA to extend or reduce the minimum stay requirement for residents and gave OHA the discretion to prioritize the family on the HCV waitlist.

OHA offered a 5:1 ratio of taking families from the HCV and the PBV transfer waitlist. The Tenancy Addendum form was modified to include the minimum stay requirement and was distributed to tenants when they moved into a PBV unit. For FY 2023, OHA required PBV households to meet a stay requirement of 2 years before requesting a housing choice voucher.

This activity did not apply to families: (1) with an approved Reasonable Accommodation that required them to move from their PBV unit, (2) who experienced a change in family composition that affected the size of the unit, or (3) who presented a compelling reason to move out of the PBV unit to the Executive Director for consideration. Circumstances surrounding requests to move, such as VAWA requirements, employment opportunities in other public housing jurisdictions and availability of tenant-based vouchers were considered. In FY 2023, no families remained on the transfer list and requests were not being taken because HCV were not being issued.

Actual Non-Significant Changes: This activity was active during the fiscal year. OHA made no non-significant changes to this activity.

Actual Changes to Metrics/Data Collection: There were no changes to the data collection methodology to report.

Actual Significant Changes: OHA made no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not have challenges to report with this activity.

Standard HUD Metrics				
HC #3: Decrease in Waitlist Time				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on waitlist in months (decrease)	Average applicant time on waitlist prior to implementation of the activity (in months) = zero	Expected applicant time on waitlist after implementation of the activity (in months) = 60	Actual applicant time on waitlist after implementation of the activity (in months) = 96	No.
HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose	Number of households at or below 80% AMI that would lose assistance or need to	Expected number of households at or below 80% AMI that would have assistance	Actual housing units Number of households at or below 80% AMI that would lose assistance or	Yes.

assistance or need to move (decrease). If units reach a specific type of household, give that type in this box. (PBVs)	move prior to implementation of the activity = Zero (0)	preserved and not need to move after implementation of the activity = zero	not need to move of this type after implementation of the activity = zero	
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HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 10 households	Actual number of households able to move to a better unit after implementation of this activity = 0 units	No.

MTW Activity #08-01: Fund Affordable Housing Development Activities

Year Approved: 2008
 Year Implemented: 2008
 Year Amended: N/A

Description/Impact/Update: Utilize Single Fund Flexibility to leverage funds to preserve affordable housing resources and create new affordable housing opportunities in Oakland. In FY 2023, Foon Lok West, the third Brooklyn Basin project, achieved 100% occupancy (having completed construction in May 2022) and converted the construction financing to permanent in March 2023. Project 4, Foon Lok East, started construction in June 2023 and by fiscal year end, the project was 61% complete. An additional 89 units were rehabilitated in OHA’s existing project-based portfolio. The chart of units in Appendix D shows the list of units in these developments and the status for all units under construction or rehabilitation.

- Brooklyn Basin – A 65-acre site that will be completely transformed, with more than 3,000 residences, 32 acres of parks and open spaces, restored wetlands, a new marina and 200,000 square feet of retail and commercial space. OHA in partnership with the City of Oakland and MidPen Housing Corporation is developing 465 units of affordable housing for low-income families and seniors as part of the Brooklyn Basin master planned community. In August 2022, three months after construction, MidPen achieved 100% occupancy of Project 3, known as Foon Lok West and converted all construction financing to permanent in March 2023. And finally, MidPen closed upon the construction financing and started construction on Project 4, known as Foon Lok East, started construction in June 2022, and made excellent progress, despite an unusually wet winter



Brooklyn Basin

season, achieving 61% completion by June 30,2023. OHA was able to serve an average of 139 families per month at Brooklyn Basin through completed local non-traditional tax credit only units.

- **285 12th Street** - OHA is partnering with the East Bay Asian Local Development Corporation (EBALDC) to construct affordable housing to include 65 units and 3,500 square feet of commercial space. The site is currently vacant and centrally located in downtown Oakland near several BART stations. OHA has committed to providing conventional PBVs for 16 units and HUD-VASH PBVs for 8 units. OHA continued providing predevelopment funding to 285 12th Street in FY 2023.
- **500 Lake Park Avenue** – OHA is partnering with EAH Housing to construct a 53-unit affordable housing building with 2,900 square feet of retail space at 500 Lake Park Avenue in the Grand Lake district of Oakland. OHA acquired the land at the 500 Lake Park project site in FY 2022 and continued providing predevelopment loan funding in FY 2023.
- **Foothill Family Apartments** - OHA and its affiliate OHI conducted predevelopment planning to rehabilitate the 65-unit mixed-finance affordable housing development. In FY 2023, OHA approved a \$15 million loan to finance the rehabilitation.
- **Mandela Station Affordable** – Mandela Station Affordable is a planned 240-unit affordable housing development, which is part of a transit-oriented development master plan at the West Oakland BART Station. The full master plan includes affordable housing, market-rate housing, an office or biotech/life sciences building, public spaces, improvements to the BART station itself. In FY 2023, OHA approved a Term Sheet for the Authority’s contribution of predevelopment financing, construction and permanent financing, and Section 8 Project-Based Vouchers to Mandela Station Affordable.
- **Buyouts** – OHA exercised its option to purchase the tax credit investor limited partner interest in Lion Creek Crossing Phase 2. OHA will work with the other owners of the development to preserve the property as affordable housing.

Actual Non-Significant Changes: This activity was active during the fiscal year. OHA made no non-significant changes to this activity.

Actual Changes to Metrics/Data Collection: There were no changes to the Metrics/Data collection.

Actual Significant Changes: OHA made no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not have challenges to report with this activity.

Standard HUD Metrics				
HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of	Housing units of this type prior to implementation of the activity = Zero (0)	Expected housing units of this type after implementation of the activity = 65 units (Phase 3 Brooklyn Basin)	Actual housing units of this type after implementation of the activity = 62 units on average were leased per month to families using non-traditional subsidies during the Fiscal Year. Lease up	No.

household, give that type in this box.			was completed in August.	
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HC #2: Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0)	Expected housing units preserved after implementation of the activity = 50 OAHPI PBV units rehabbed.	Actual housing units of this type after implementation of the activity = 133 total units, 89 OAHPI units and 44 public housing units rehabbed	Yes.

HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity =65 households (Phase 3 of Brooklyn Basin)	Actual number of households able to move to a better unit after implementation of this activity = 62 units	No.

MTW Activity #06-01: Site Based Wait Lists

Year Approved: 2006
Year Implemented: 2006
Year Amended: N/A

Description/Impact/Update: Establish site-based wait lists at all public housing sites, HOPE VI sites, and developments with PBV allocations. Overall, OHA saw mixed results with achieving a decrease in waitlist time due to site-based waitlists. Many factors influenced time spent on waitlists including low unit month vacancy rates and turnover of units. The error rate was determined using random file sampling as a result of an internal audit of specific waitlists. OHA will use this activity for RAD voucher holders.

Actual Non-Significant Changes: This activity was active during the fiscal. OHA had no non-significant changes to this activity.

Changes to Metrics/Data Collection: OHA had no changes to the metrics. There were no changes to the data collection methodology to report.

Actual Significant Changes: OHA had no significant changes to this activity.

Narrative Explanation of Challenges/New Strategies: OHA had no challenges or new strategies to report.

OHA and Standard Metrics

CE #3: Decrease in Error Rate of Task Execution

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Number of errors in completing task prior to implementation = 10%	Expected average rate of errors in completing the task after implementation = 5%	Actual average rate of errors in completing the task = 0% - no audit findings	Yes.

HC #3: Decrease in Wait List Time

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	Number of months applicants spent on centralized waitlist prior to implementation =60 months	Expected average number of months applicants spend on site-based waitlist per site	Actual average number of months applicants spent on waitlist.	
Campbell Village	60 months	65 months	12 months	Yes.
Lockwood Gardens	60 months	48 months	72 months- This waitlist was exhausted during the FY. It was reopened in May/June, the waitlist time will decrease to 0 months.	No
Peralta Villa	60 months	48 months	72 months- This waitlist was exhausted during the FY. It was reopened in May/June, the waitlist time will decrease to 0 months.	No
Harrison Towers	60 months	48 months	N/A – due to pending disposition and rehab.	N/A
Adel Court	60 months	60 months	11 months	Yes
Palo Vista Gardens	60 months	24 months	74 months	No
Linden Court	60 months	55 months	15 months	Yes
Mandela Gateway	60 months	55 months	120 months	No
Chestnut Court	60 months	24 months	30 months	No
Foothill Family Apts	60 months	75 months	60 months	Yes
Lion Creek Crossing	60 months	24 months	37 months	No

OHA Metric - Vacancy Rate per public housing site

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average vacancy rate per public housing site (unit month average as a percentage)	Vacancy rate per site prior to implementation = 2%	Expected vacancy rate per site = 2%	Actual Vacancy rate per site (percentage)	
Campbell Village	2%	1.32%	3.73%	No
Lockwood Gardens	2%	2.71%	3.72%	No
Peralta Villa	2%	1.29%	3.11%	No
Harrison Towers	2%	0.67%	N/A due to pending disposition and rehab.	N/A.
Adel Court	2%	1.11%	4.72%	No
Palo Vista Gardens	2%	0.93%	3.25%	No
Linden Court	2%	1.54%	5.70%	No
Mandela Gateway	2%	3.80%	3.25%	Yes
Chestnut Court	2%	0.93%	8.89%	No
Foothill Family Apts	2%	0.79%	2.46%	No
Lion Creek Crossing I&II	2%	1.43%	1.35%	Yes
Lion Creek Crossing III	2%	0.45%	0.45%	Yes
Lion Creek Crossing IV	2%	0.00%	0.40%	No

MTW Activity #06-02: Allocation of PBV Units: Without Competitive Process

Year Approved: 2006

Year Implemented: 2006

Year Amended: N/A

Description/Impact/Update: Allocate PBV units to developments owned directly or indirectly by OHA without using a competitive process. In FY 2023, OHA did not utilize this activity.

Actual Non-Significant Changes: There were no non-significant changes to this activity.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection methods.

Actual Significant Change: OHA had no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not have challenges with this activity during the FY to report.

Standard HUD Metrics				
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$7,500 per RFP	Expected cost of task after implementation of the activity = \$0	Activity was not used in FY 2023.	N/A
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 100 hours per RFP	Expected amount of total staff time dedicated to the task after implementation of the activity = 15 hours per RFP	Activity was not used in FY 2023.	N/A

MTW Activity #06-03: Allocation of PBV Units: Using Existing Competitive Process

Year Approved: 2006

Year Implemented: 2006

Year Amended: N/A

Description/Impact/Update: Allocate PBV units to qualifying developments using the City of Oakland Notice of Funding Availability (NOFA)/ RFP or other existing competitive process. This activity was created to reduce the administrative time and development costs associated with issuing an RFP and to increase housing choices by creating new or replacement affordable housing opportunities. In FY 2023, OHA did not use this activity.

Actual Non-Significant Changes: This activity was active during the fiscal. This activity is dependent upon the number of projects that go through the City of Oakland Notice of Funding Availability annual competitive process, which did not result in projects for OHA to fund during the FY.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection methods.

Actual Significant Change: OHA had no significant changes to this activity.

Challenges in Achieving Benchmarks and Possible Strategies: OHA did not have challenges with this activity during the FY to report.

Standard HUD Metrics				
CE #1: Agency Cost Savings				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$7,500 per RFP	Expected cost of task after implementation of the activity = \$0	Zero projects were awarded PBV funding without an OHA administered RFP = Cost savings of \$0	OHA did not utilize the activity in FY 2023.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 100 hours per RFP	Expected amount of total staff time dedicated to the task after implementation of the activity = 35 hours per RFP	Zero projects were awarded PBV funding without an OHA administered RFP = Time savings of \$0	OHA did not utilize the activity in FY 2023.

B. Not Yet Implemented Activities

Table 15: Approved MTW Activities Not Yet Implemented

Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
20-01	2020	Emergency Relief from Interim Recertifications	Allow wage earning families to self-certify income decreases due to an emergency situation and have OHA pay all or a portion of a tenant's rent for the duration of the declared disaster period	Reduce costs and achieve greater cost effectiveness	Attachment C 4, Section D.1.c, and Use of Funds. Further authorizations are found in Attachment D, Section D, Use of Funds
17-02	2017	Automatic Rent Increase	Offer owners an automatic rent increase on the HAP contract anniversary date	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, D.2.b&c
13-01	2016	Rent Reform Pilot Program	Creates a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where: <ul style="list-style-type: none"> Total Tenant Payment (TTP) calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households Triennial recertification schedule for senior and disabled households, biennial schedule for work-eligible households Eliminate all deductions and earned income disallowance Recent increases in income excluded in recertification Absolute minimum rent of \$25 	<ul style="list-style-type: none"> -Reduce costs and achieve greater cost effectiveness -Provide incentives for families with children to become economically self-sufficient 	Attachment C, Section C.4, C.11 Section D.1.c Section D.2.a

MTW Activity #20-01: Emergency Relief from Interim Re-certifications

Year Approved: 2022

Description/Impact/Update: The COVID-19 public health crisis in early 2020, has affected and will continue to affect program participants' incomes and their ability to pay rent. The crisis also imposed an incredible burden on OHA to manage hundreds of calls to modify income, request hardship, and reschedule cancelled appointments. Under this activity, OHA will use single fund flexibility to provide temporary relief from required activities for program participants and reduce administrative burden on OHA staff during declared disaster periods. The activity, based on documented need for the flexibility and funding availability, provides:

- Temporarily relieve tenants who experience a sudden and unexpected loss of income of the immediate need to submit detailed interim income/rent reduction requests,
- Pause requirements for OHA to perform and submit interim re-certifications for eligible participants in order to redirect staffing resources to more critical administrative tasks during a time of emergency by pausing the requirement to perform interim reexaminations (form HUD 50058-MTW action type 3) during declared disaster periods, and
- Provide short-term supplemental housing assistance for eligible families that pays all or some of the tenant portion of the rent in addition to existing subsidy provided by OHA.

Goals of the activity include:

- 1) Have the option to provide rent relief during crisis for a low-income population
- 2) Offset any possible issues with landlords leaving the program due to nonpayment of rent issues once the eviction moratoria are lifted
- 3) Provide relief for staff of normal operating administrative tasks by simplifying rent process: Freeze rents, no calculations, no interims or re-certs during this time to focus limited on-site staffing resources to critical areas

Actions Taken Toward Implementation: This activity is designed to be used in any crisis or emergency situation and will be kept for future needs in emergency situations. In FY 2023, no action was taken to implement.

MTW Activity #17-02: Automatic Rent Increases for HCV

Year Approved: 2017

Description/Impact/Update: During the last several years, the Bay Area has rebounded from the recession with a robust economy, which has resulted in increased local population and a sharp decrease in available inventory in the rental market, causing rents to rise at rates that are leading the nation. As a result, the number of rent increases requested by owners in the HCV program has risen from 173 requests in January of 2015 to 565 requests at the end of 2015 and is currently averaging 333 requests per month. Compounding this challenge, OHA saw a loss of approximately 824 units from the program during 2015 due to owners opting to leave the program for various reasons.

To stem this tide of owners leaving the program for unassisted tenants, OHA will offer HCV owners an automatic rent increase that will be initiated by OHA. The amount of the increase will be determined by OHA for targeted small area rental markets identified by OHA. The automatic rent increase amount will be set using multiple data sources for small-targeted geographic areas within the larger jurisdiction as identified by OHA. For selected targeted small rental market areas, OHA will conduct a rent increase

analysis using internal and external data sources. Internal data sources may include the number of requested and approved increases and the amounts approved, and/or the average rent in the targeted small market area for new Section 8 contracts. The external data sources may include various available data sources including the Consumer Price Index, Zillow, Go Section 8, Rent.com etc. that provide information and data on rental housing market trends in the target area. If a small rental market area increase is warranted and approved by the Executive Director, or his designee, the offers will be made to all property owners in the targeted area who have not received a rent increase in the last twelve months. If the owner elects to accept the increase offered, they will not be eligible for another increase for at least twelve months.

Actions Taken Toward Implementation: OHA put significant efforts in FY 2019 towards developing a research partnership with UC Berkeley to explore various questions and aspects of landlord behavior, incentives, motivations, and other useful metrics to determine future activities, incentives and amounts for increases. Due to challenges in executing the partnership, OHA was forced to put the research project on hold in FY 2020 and in FY 2021 explored other partnership opportunities but has not committed to any projects. In FY 2023, the activity remained on hold pending hiring the appropriate staff to move the activity forward.

MTW Activity #13-01: Rent Reform Pilot Program

Year Approved: 2013

Description of MTW Activity: Create a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where:

- Total Tenant Payment (TTP) calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households
 - Working seniors and working disabled individuals will have the option to choose to be included in the “work-eligible” group where their rent would be calculated based on 27% of their gross income and they would be on a biennial recertification schedule
- Triennial recertification schedule for senior and disabled households, biennial schedule for work-eligible households
- Eliminate all deductions (elderly/disabled deduction, dependent deduction, medical expenses, child care expenses) and earned income disallowance
- Increases in income within six months of recertification are excluded
- Absolute minimum rent of \$25. Households will still be eligible for a utility allowance. However, no rent will be reduced below the minimum rent due to a utility allowance
- Flat rent – In the Public Housing program, households will still have the option to choose a flat rent or the rent reform income-based rent calculation during initial eligibility or at the time of recertification

During the test phase of the pilot program, OHA will, at its discretion, withdraw components that are not working and/or move forward with implementing the policy for additional participants or properties based on the outcomes, after providing an opportunity for the public to comment on proposed changes. More details about this program and its components can be found in the FY 2013 MTW Annual Plan.

Actions Taken Toward Implementation: OHA worked with the business system vendor to develop a specification for a modification to allow biennial and triennial re-certifications to be tracked and

scheduled. OHA is currently waiting for the vendor to deliver the software modification so that it can be tested and implemented and the appropriate metrics for this activity can be tracked. These sites are being transitioned to a different property management group and company and planning for this activity cannot begin until the transition is complete. Due to COVID and out of the ordinary resource constraints, OHA was not able to explore starting this activity as planned.

C. Activities on Hold

Table 16: Approved MTW Activities on Hold

Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
10-07	2010	Disposition Relocation and Counseling Services	Provides counseling and relocation assistance to impacted public housing residents in developments approved for disposition.	-Provide incentives for families with children to become more economically self-sufficient -Increase housing choices	Attachment D, Use of Funds
09-01	2011	Alternative HQS System	Uses a risk-based strategy to allocate HQS inspection resources in order to improve compliance at problem properties and allocate fewer resources to properties with a history of compliance.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.5 Attachment D, Section D
09-02	2010	Short-Term Subsidy Program	Provides temporary housing assistance to preserve existing affordable housing resources and allow tenants to remain in-place.	Reduce costs and achieve greater cost effectiveness	Attachment D, Use of Funds

MTW Activity #10-07: Disposition Relocation and Counseling Services

Year Approved: 2010
Year Implemented: 2010
Year Placed on Hold: 2012

Description of MTW Activity: Provide counseling and relocation assistance to residents impacted by an approved disposition of public housing units.

Actions Taken Toward Reactivation: OHA held this activity off-line as it was determined it was not needed for Oak Grove North and South dispositions. As the RAD conversion of Lion Creek Crossing Phases 1-4 did not convert, this activity was not removed from hold.

MTW Activity #09-01: Alternative HQS System

Year Approved: 2009
Year Implemented: 2010
Year Placed on Hold: 2017

Description of MTW Activity: Develop an alternative inspection methodology and frequency for HQS inspections based on a risk assessment system and findings from prior inspections. Properties that are HQS compliant and pass their first inspection are only inspected every two years. Properties that fail on the first and second inspection remain on the annual inspection schedule. After two inspections that pass, the property may be placed back on an annual or biennial inspection schedule. Results of the inspections are submitted electronically to HUD via the HUD 50058 form and stored electronically in OHA's database.

Actions Taken Toward Reactivation: This activity remains on hold until OHA decides to implement an alternative HQS inspection methodology. Currently, the regulatory inspection guidelines are working well for the needs of OHA and its owners.

MTW 09-02: Short-Term Subsidy Program

Year Approved: 2010

Year Implemented: 2010

Year Placed on Hold: 2011

Description of MTW Activity: Provide temporary subsidy funding to buildings 1) that were developed with assistance from the City of Oakland, 2) where there is a risk of an imminent threat of displacement of low income households, and 3) where it can be reasonably expected that providing short-term subsidy assistance will provide the necessary time to preserve the affordable housing resource.

Actions Taken Toward Reactivation: This activity remains on hold until applicable projects become available that would require use of this MTW authorization and OHA determines that funding is available. OHA wishes to keep the activity active to ensure the availability of the resource for future needs, particularly in light of the current escalating rental market and displacement from naturally occurring affordable housing units that is occurring in the City.

D. Closed Out Activities

OHA does not have any closed-out activities to report for FY 2023.

Section V. Sources and Uses of Funds

A. MTW Report: Sources and Uses of Funding for the Fiscal Year

1) Actual Sources of MTW Funding for the Fiscal Year

OHA submitted its unaudited financial information in the prescribed format in the Financial Assessment System by first week of August 2023.

2) Actual Uses of MTW Funds in the Plan Year

OHA shall submit unaudited and audited information in the prescribed FDS format through the FASPHA, or its successor system.

3) Activities that Used Only the Single Fund Flexibility

The single fund flexibility afforded by MTW allowed OHA to plan and respond to the local needs of the community. OHA chose to allocate funding to several initiatives that supported OHA's strategic goals and priorities described in Section I: Introduction.

The OHA activities and initiatives described below used solely the single fund flexibility and no other MTW waiver or authorization.

Fund Deferred Maintenance and Capital Improvements

OHA used the single fund flexibility to provide supplemental funding and address capital improvement needs at its OHA-managed sites and renovated 133 units, of which 44 were public housing. The remaining 89 units renovated were located at scattered sites located in a PBV portfolio called OAHPI.



Fund Development



Foon Lok West – Community Area

OHA used the single fund flexibility to invest in and develop new affordable housing in high-opportunity districts, increase resident safety and security through community policing and create positive outcomes in the areas of education, job readiness and health and wellness. These all extend the impact of MTW beyond just housing.

Lease up was completed early in the FY on Phase 3 of Brooklyn Basin called Foon Lok West, which added 130 family units of affordable housing as part of a large redevelopment of a 65-acre plot of land previously owned by the Port of Oakland. Phase 4 of

Brooklyn Basin, called Foon Lok East, began construction during the FY, and achieved 61% completion. OHA continued pre-development partnerships with EBALDC and EAH respectively to develop two new sites with affordable housing called 285 12th Street and Lake Park. OHA acquired an acquisition bridge loan and a predevelopment loan for 285 12th Street, a planned 65-unit affordable housing building on a currently vacant parcel.

Promoting Resident Empowerment and Self-Sufficiency

The Department of Family and Community Partnerships (FCP), created under single fund flexibility, provides information and referral services as well as other family supportive services to households served by OHA. FCP assigned two full-time coordinators to administer workforce development programming to maintain employment development opportunities and job readiness training for OHA residents. Job fairs and job readiness and retention trainings were offered, in addition to assistance from coordinators with computer access, online professional development training, and unlimited seminars.

The Family Self-Sufficiency (FSS) Action Plan was approved halfway through the FY, this allowed FCP to begin enrolling families into the newly redesigned program aimed at incentivizing enrollment for families of all income ranges. Enrollment began in April 2023 and has resulted in 41 families across varied income levels joining the FSS program to date.

OHA was awarded the Job Plus Grant to increase job opportunities for public housing residents at Lockwood Gardens, a large public housing site located in East Oakland. OHA continued to partner with the Oakland Private Industry Council (PIC) and Alameda County for the grant application and increased our partnerships with new and diverse employers located in East Oakland. This grant opportunity will allow OHA to scale and host large job fairs in our East District office, offer on-site support, employment labs, and computer access and literacy to underserved East District residents.

Search Assistance/Housing Navigator

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FCP offered and provided case management and counseling services to support residents with lease compliance, education, post-move-in counseling, and financial literacy. To support FYI youth with employment services, OHA sent 16 referrals to Lao Family Community Development, Inc. who worked with FYI participants to provide life and career skills development. Support included assistance with resume writing, interview strategies, job search, job placement, job retention, professionalism, effective communication, career planning, and case management.

FYI youth were encouraged to attend a Family Self-Sufficiency (FSS) Program orientation to enroll in the program to extend their voucher subsidy for an additional 24 months, and case management services to support their economic independence to self-sufficiency.

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McClymond's High School, Oakland High School, Castlemont High School, and Fremont High School.

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Elementary Schools:

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Promise Plus collaborates with the City of Oakland's Health and Human Services Agency to provide an annual summer lunch program and a local community-based healthcare agency to ensure youth residents receive vision exams and necessary eyewear to fully participate in their learning experience. Staff hosted an annual back-to-school campaign to distribute backpacks and school supplies to over 300 youths. Staff provided case management to families, attended school site meetings (Coordination of Student Support and Attendance Team), and referred parent(s) to programs



and services available within FCP in an effort to provide solutions for the entire household. Other partnerships that support the initiative include Community Education Partnerships (CEP), a local non-profit organization, that provided academic tutoring support in English and Math for 65 residents, and the Oakland Literacy Coalition, which awarded two mini grants to support family literacy events in the Fall and Spring. In the Fall, residents with Pre-Kindergarten/Kindergarten students were invited to engage in craft activities with their children while learning about preparing for school and improving reading comprehension. In Spring, FCP collaborated with Atlanta-based, STEAM Sports, to facilitate an E-Games competition at Lockwood Gardens. FCP continues to partner with the Boys and Girls Club to provide youth residents with a week-long outdoor experience at Camp Mendocino.

Digital Literacy (Chromebooks, Tablets)

Expanded initiatives aimed at improving the economic and digital literacy skill-building outcomes for program participants by distributing Chromebooks and/or Tablets and providing digital literacy training. Through single-fund flexibility, staff will continue to provide technological devices and digital literacy training to help close the digital divide and improve skills needed for self-sufficiency. Staff will continue leveraging partnerships to increase virtual training opportunities that directly link residents to service providers. Additionally, the continued distribution of technological devices allows staff to support activities that enhance residents' ability to navigate the increased need for digital literacy in Oakland. Staff may explore options to provide additional equipment and other skill-building support for families.

Provided a Consistent Level of Security to OHA Residents

Providing a safe and stable place to live for all OHA residents includes providing continual and effective security for our community was a top priority in FY 2023. One of the most effective ways to accomplish this goal is through the Oakland Housing Authority Police Department (OHAPD) activities, funded through MTW single-fund flexibility.



OHAPD's main goals for FY 2023 included fostering a community of safety by reducing violent crime while maintaining community relations, providing transparency and communications to residents, and working as a team with other OHA divisions to provide a cooperative effort toward the common goal of safety.

OHAPD reduced crime by conducting patrol and vacant unit checks on OHA properties in addition to responding to calls for service. OHA worked with the other divisions to provide services and resources to provide victims of crime with assistance. OHAPD also conducted initial and on-going evaluations of sites to prevent crime by personnel trained in Crime Prevention Through Environmental Design (CPTED).

Expanded Community Engagement

To facilitate community and resident communication, OHAPD increased community education and use of the text tip-line. This program named Tip-411, is a text-based crime reporting program to effectively communicate with both staff and the resident community via massive group text and allowed residents to send and receive photos and videos. Tip-411 connected almost 2,900 registered users to updates regarding police activity, community events, and other activities affecting their community.



As Oakland exited the global pandemic, OHAPD increased outreach efforts to educate residents on services provides and to ensure strong working relationships with the resident community was a main objective of FY 2023. While the Tip-411 program addressed some of the challenges, OHAPD made a concerted effort to attend as many site meetings, special events, and community meetings, known as Neighborhood Council (NC), as possible. Additionally, OHAPD participated in many community

events such as Coffee with a Cop, Ice Cream Socials, Make Oakland Better (MOB) Community Clean Up, Safety Updates at Senior Sites, Anti-bullying Presentations, Christmas Tree Giveaway, and Youth Engagement events. In FY 2023, OHAPD attended 48 special events and 56 community meetings.

Enhanced Partnerships

During FY 2023, the investigations unit attended approximately 50 Ceasefire meetings, a collaborative strategy among law enforcement, local clergy and community organizations to bring down violent-crime rates in the City of Oakland's Department of Violence Prevention. OHAPD fostered positive working relationships with law enforcement agencies and many community advocacy groups, exemplified by the fact that multiple OHAPD investigations were highlighted during these meetings.

Another important partnership formed during FY 2023 included the Mobile Assistance Community Responders of Oakland (MACRO). MACRO is a community response program for non-violent, non-emergency 911 calls. MACRO's response teams provide resources during non-emergent and non-violent calls for service.

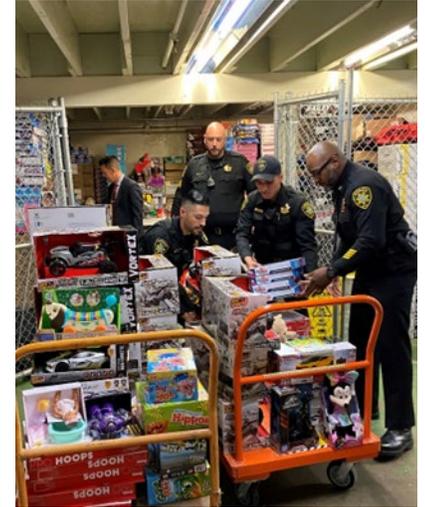
Goal and Achievement to Provide a Consistent Level of Security to Residents

- OHAPD focused on violent crime reduction.
- Conducted 9,007 patrol checks on OHA properties and 2,931 vacant unit checks.
- Ensured thorough and complete investigations to solve crimes and provided extra support and resources to Field Operations.
- Utilized multiple available databases, including internal systems, and provided staff trainings to ensure effectiveness of all staff members.
- Formed collaborative partnership with Mobile Assistance Community Responders of Oakland (MACRO).
- OHAPD ensured staff had significant time to conduct investigations.
 - Field Operations and Communications worked together to monitor priority calls and provided time and resources for investigations.

- OHAPD trained staff on accessing and searching multiple databases to identify subjects, victims, witnesses, vehicles, etc. to develop investigative leads. Staff and stakeholders were kept abreast of critical events and trends to facilitate collaboration during regular meetings and correspondence.

Goal and Achievement for Maintained and Increased Transparency and Resident Partnerships

- Implemented strategies to address community input and concerns discovered during the 2021-2022 Resident Survey.
- Increased the number of community and youth events.
 - Trunk or Treat and the annual Toy Giveaway were events focused specifically on youth and families.
 - Increased interaction with officers during youth summer events.
 - Increased the number of Explorers.
 - Regular presence at Neighborhood Councils to address OHA property issues.
- Increased use of technology, alert systems to notify residents and community members of crime trends and activities like to affect communities.
 - Implemented mass text crime reporting and alerting system with almost 2,900 participants.



Security Deposit Assistance

OHA provided security deposit assistance to EHV applicants where a security deposit is a barrier to being housed. OHA used \$19,780 in EHV funds, not MTW funds, to provide this assistance.

Matching Funds

OHA did not provide matching funds for grants in FY 2023.

Table 17: Actual Use of MTW Single Fund Flexibility

Narrative of actual activities that use only the MTW single fund flexibility

Fund Deferred Maintenance and Capital Improvements

OHA used the single fund flexibility to provide supplemental funding and address capital improvement needs at its OHA-managed sites and renovated 133 units, of which 44 were public housing. The remaining 89 units renovated were located at scattered sites located in a PBV portfolio called OAHPI.

Fund Development

OHA used the single fund flexibility to invest in and develop new affordable housing in high-opportunity districts, increase resident safety and security through community policing and create positive outcomes in the areas of education, job readiness and health and wellness. These all extend the impact of MTW beyond just housing.

Lease up completed early in the FY on Phase 3 of Brooklyn Basin called Foon Lok West, which added 130 family units of affordable housing as part of a large redevelopment of a 65-acre plot of land previously owned by the Port of Oakland. Phase 4 of Brooklyn Basin, called Foon Lok East, began construction during the FY, and achieve 61% completion. OHA continued pre-development partnerships with EBALDC and EAH respectively to develop two new sites with affordable housing called 285 12th Street and Lake Park. OHA acquired provided an acquisition bridge loan and a predevelopment loan for 285 12th Street, a planned 65-unit affordable housing building on a currently vacant parcel.

Promoting Resident Empowerment and Self-Sufficiency

The Department of Family and Community Partnerships (FCP), created under single fund flexibility, provides information and referral services as well as other family supportive services to households served by OHA. FCP assigned two full-time coordinators to administer workforce development programming to maintain employment development opportunities and job readiness training for OHA residents. Job fairs and job readiness and retention trainings were offered, in addition to assistance from coordinators with computer access, online professional development training, and unlimited seminars.

The Family Self-Sufficiency (FSS) Action Plan was approved halfway through the FY, which allowed FCP to begin enrolling families into the newly redesigned program aimed at incentivizing enrollment for families of all income ranges. Enrollment began in April 2023 and has resulted in 41 families across varied income levels joining the FSS program to date.

OHA was awarded the Job Plus Grant to increase job opportunities for public housing residents at Lockwood Gardens, a large public housing site located in East Oakland. OHA continued to partner with the Oakland Private Industry Council (PIC) and Alameda County for the grant application and increased our partnerships with new and diverse employers located in East Oakland. This grant opportunity will allow OHA to scale and host large job fairs in our East District office, offer on-site support, employment labs, and computer access and literacy to underserved East District residents.

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Once housed, FCP provided a "Welcome Kit" to each EHV program participant, which included: cookware, dinnerware, a tool kit, and other essential household items to support the transition from homelessness to being housed. OHA provided 214 Welcome Kits during this FY. Additionally, EHV services fee funding was used to pay \$395,000 in sign on bonuses for owners associated with these special purpose vouchers. For other special purpose vouchers \$95,000 for owner incentives were paid.

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Enhanced Partnerships

During FY 2023, the investigations unit attended approximately 50 Ceasefire meetings, a collaborative strategy among law enforcement, local clergy and community organizations to bring down violent-crime rates in the City of Oakland's Department of Violence Prevention. OHAPD fostered positive working relationships with law enforcement agencies and many community advocacy groups, exemplified by the fact that multiple OHAPD investigations were highlighted during these meetings.

Another important partnership formed during FY 2023 included the Mobile Assistance Community Responders of Oakland (MACRO). MACRO is a community response program for non-violent, non-emergency 911 calls. MACRO's response teams provide resources during non-emergent and non-violent calls for service.

Goal and Achievement to Provide a Consistent Level of Security to Residents

- OHAPD focused on violent crime reduction.
- Conducted 9,007 patrol checks on OHA properties and 2,931 vacant unit checks.
- Ensured thorough and complete investigations to solve crimes and provided extra support and resources to Field Operations.
- Utilized multiple available databases, including internal systems, and provided staff trainings to ensure effectiveness of all staff members.
- Formed collaborative partnership with Mobile Assistance Community Responders of Oakland (MACRO).
- OHAPD ensured staff had significant time to conduct investigations.
 - Field Operations and Communications worked together to monitor priority calls and provided time and resources for investigations.
 - OHAPD trained staff on accessing and searching multiple databases to identify subjects, victims, witnesses, vehicles, etc. to develop investigative leads. Staff and stakeholders were kept abreast of critical events and trends to facilitate collaboration during regular meetings and correspondence.

Goal and Achievement for Maintained and Increased Transparency and Resident Partnerships

- Implemented strategies to address community input and concerns discovered during the 2021-2022 Resident Survey.
- Increased the number of community and youth events.
 - Trunk or Treat and the annual Toy Giveaway were events focused specifically on youth and families.
 - Increased interaction with officers during youth summer events.
 - Increased the number of Explorers.
 - Regular presence at Neighborhood Councils to address OHA property issues.
- Increased use of technology, alert systems to notify residents and community members of crime trends and activities like to affect communities.
 - Implemented mass text crime reporting and alerting system with almost 2,900 participants.

Security Deposit Assistance

OHA provided security deposit assistance to applicants where a security deposit is a barrier to being housed. OHA used a different source of funds to provide this assistance in FY 2023: Cares Act funding (\$293,619), EHV funds (\$19,780) and MTW Funds (\$67,614).

Matching Funds

OHA did not provide matching funds for grants in FY 2023.

B. MTW Report: Local Asset Management Plan

OHA did not implement a local asset management plan during FY 2023.

Table 18: Local Asset Management Plan

I. Did the MTW PHA allocate costs within statute in the Plan Year?

Yes

II. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?

No

III. Did the MTW PHA provide a LAMP in the appendix?

No

IV. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.

Section VI. Administrative

A. General description of any HUD reviews, audits, or physical inspection issues that require the agency to take action to address the issue

There are no items to report under this section.

B. Results of the Latest Agency-directed Evaluations of the Demonstration

There are no items to report under this section.

C. Certification of Compliance with MTW Statutory Requirements

The Oakland Housing Authority certifies the submission of the Fiscal Year 2023 MTW Annual Report and that the Oakland Housing Authority has met the three statutory requirements of:

- 1) Assuring that at least 75 percent of the families assisted by the Authority are very low-income families; and
- 2) Continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and
- 3) Maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration.

The FY 2023 MTW Annual Report is in compliance with all applicable MTW regulations and requirements.

D. MTW Energy Performance Contract (EPC) Flexibility Data

Not applicable.

Appendices

Appendix A. Project-Based Voucher Allocations

Appendix B. Overview of Other Housing

Appendix C. Affordable Housing Development Activities by Unit Type

Appendix D. MTW & Non-MTW Housing Stock

Appendix E. Glossary of Acronyms

Appendix A

Project-Based Voucher Allocations

Project-Based Voucher Allocation Projections as of					
June 20, 2023					
Development Name	Date of Board Approval	# Of PBV Units	Contract Date	Contract Expiration	Population Served
<i>HAP contracts</i>					
Mandela Gateway	February 12, 2003	30	October 20, 2004	October 17, 2024	Low Income Families
Altenheim Senior Housing Phase I	July 13, 2005	23	January 1, 2007	December 31, 2032	Senior
Lion Creek Crossings II	November 9, 2005	18	July 3, 2007	July 20, 2037	Low Income Families
Madison Apartments (Street Lofts)	July 13, 2005	19	April 25, 2008	June 25, 2038	Low Income Families
Lion Creek Crossings III	June 14, 2006	16	June 25, 2008	June 25, 2038	Low Income Families
Seven Directions	July 13, 2005	18	September 12, 2008	September 12, 2038	Low Income Families
Orchards on Foothill	June 14, 2006	64	November 7, 2008	April 29, 2039	Senior
Fox Courts / Uptown Oakland	December 3, 2004	20	May 15, 2009	May 15, 2024	Low Income Families / Homeless with HIV/AIDS
Jack London Gateway - Phase II	February 26, 2007	60	June 5, 2009	June 4, 2024	Senior
14th St. Apartments at Central Station	January 22, 2007	20	November 25, 2009	November 24, 2024	Low Income Families
Tassafaronga Village Phase I	February 25, 2008	80	April 23, 2010	April 23, 2025	Low Income Families
Altenheim Senior Housing Phase II	April 28, 2008	40	April 5, 2010	April 4, 2025	Senior
Fairmount Apartments	October 24, 2008	16	March 8, 2010	March 7, 2025	Low Income Families / Persons with Disabilities
Tassafaronga Village Phase II	July 21, 2008	19	May 27, 2010	May 27, 2025	Low Income Families / Homeless with HIV/AIDS
*Harp Plaza (19)	May 24, 2010	19	August 1, 2010	July 31, 2025	Low Income Families
*Effie's House (10)	May 4, 2009	10	August 1, 2010	August 1, 2025	Low Income Families
Drachma Housing Inc	May 4, 2009	14	November 29, 2010	November 30, 2025	Low Income Families /
Drachma Housing LP		11	March 1, 2019	March 1, 2039	Low Income Families

Foothill Family Partners	June 28, 2010	11	August 1, 2011	January 12, 2027	Low Income Families
St. Joseph's Senior Apts	May 29, 2007	83	August 22, 2011	August 22, 2026	Senior
OHA Scattered Sites (OAHPI)					
AMP 9	July 27, 2009	1539	May 1, 2010	April 30, 2025	Low-income families/public housing disposition
AMP 10	July 27, 2009		April 1, 2010	March 31, 2025	
AMP 11	July 27, 2009		January 1, 2010	December 31, 2024	
AMP 12	July 27, 2009		May 1, 2010	April 30, 2025	
AMP 13	July 27, 2009		April 1, 2010	March 31, 2025	
AMP 14	July 27, 2009		January 1, 2010	December 31, 2024	
Lion Creek Crossings IV	April 28, 2008	10	January 13, 2012	January 12, 2027	Low Income Families
Savoy Phase 1 (A)	June 28, 2010	55	February 14, 2012	February 14, 2025	Special Needs
*Hugh Taylor house (35)	June 11, 2011	35	May 8, 2012	May 7, 2027	Low Income Families / Mod Rehab Conversion
*Madison Park (96)	June 11, 2011	96	June 7, 2012	June 6, 2032	Low Income Families / Mod Rehab Conversion
Merritt Crossing Apts (6th and Oak)	May 4, 2009	50	June 27, 2012	June 26, 2027	Senior
720 E 11th Street Apts (aka Clinton Commons)	April 28, 2008	16	October 2, 2012	October 2, 2027	Low Income Families / Homeless with HIV/AIDS
Harrison Street Senior Housing	April 23, 2007	11	November 15, 2012	November 15, 2027	Senior
Kenneth Henry Court	April 11, 2011	13	February 8, 2013	March 5, 2027	Low Income Families
California Hotel Phases 1 and 2	February 28, 2011	88	March 1, 2013	March 1, 2028	Special Needs / Homeless / HIV/AIDS
James Lee Court	October 25, 2010	12	March 21, 2013	March 20, 2028	Low Income Families
Savoy Phase 2 (B)	June 28, 2010	46	March 29, 2013	February 14, 2025	Special Needs / Homeless / HIV/AIDS
Slim Jenkins Court	May 4, 2009	11	May 8, 2013	May 8, 2028	Low Income Families
Oak Point Limited (OPLP)	October 25, 2010	15	May 30, 2013	May 30, 2028	Low Income Families
Drasnin Manor	October 25, 2010	25	June 27, 2013	June 26, 2028	Low Income Families
St. Joseph's Family Apts	October 25, 2010	15	December 3, 2013	December 1, 2026	Low Income Families
MacArthur Apts	October 25, 2010	14	October 13, 2013	October 13, 2028	Low Income Families
California Hotel Phase 3	February 28, 2012	47	November 22, 2013	March 1, 2028	Special Needs / Homeless / HIV/AIDS
Lion Creek Crossings V	October 17, 2011	127	August 11, 2014	January 12, 2027	Senior
Cathedral Gardens	May 23, 2011	43	October 27, 2014	October 28, 2029	Low Income Families
Lakeside Senior Apartments	January 23, 2012	91	January 26, 2015	January 26, 2030	Senior

Marcus Garvey Commons	April 11, 2011	10	March 17, 2015	March 16, 2030	Low Income Families
1701 Martin Luther King Jr. Way	May 20, 2013	25	December 7, 2015	December 17, 2030	Special Needs / Homeless / HIV/AIDS
MURAL aka MacArthur Transit Village	February 28, 2011	22	January 20, 2016	January 2, 2031	Low Income Families
AveVista aka 460 Grand	March 16, 2010	34	January 27, 2016	January 27, 2031	Low Income Families
11th and Jackson (Prosperity Place)	November 30, 2010	35	February 1, 2017	January 12, 2032	Low Income Families
Fox Court Apts. (13)	December 5, 2016	13	September 15, 2017	September 15, 2032	Low Income Families
Ambassador Apts. (10)	December 5, 2016	10	September 1, 2017	September 1, 2032	Low Income Families
Seven Directions (10 additional vouchers)	December 5, 2016	10	December 1, 2017	November 30, 2032	Low Income Families
Adeline Street Lofts	December 5, 2016	20	March 1, 2018	March 1, 2033	Low Income Families
Rosa Park	December 5, 2016	11	February 1, 2018	February 1, 2033	Low income and homeless individuals
Madison Street Loft Apts (additional vouchers)	December 5, 2016	31	June 9, 2018	April 9, 2033	Low Income Families
Stanley Avenue Lofts	December 5, 2016	13	June 1, 2018	June 1, 2033	Low Income Families
Swan Market	December 5, 2016	10	December 1, 2017	December 1, 2032	Low Income Families
San Pablo Hotel	December 5, 2016	31	February 19, 2018	February 18, 2033	Low Income Seniors
Hisman Hin-Nu Apts	December 5, 2016	10	December 15, 2017	December 14, 2032	Low Income Families
Oak Park Apts	December 5, 2016	10	December 15, 2017	December 14, 2032	Low Income Families
94th and International (Acts Cyrene)	October 17, 2011	14	December 29, 2017	December 28, 2032	Low Income Families
Civic Center TOD	7/22/2014 and 2/26/18	20	December 29, 2017	July 1, 2038	Special Needs / Homeless
Hamilton Apts	December 5, 2016	92	March 15, 2019	March 14, 2039	Low income and homeless individuals (08)
Westlake Christian Terrace West	February 27, 2017	121	February 25, 2019	February 24, 2039	Low Income Seniors (08)
Redwood Hill Townhomes	6/1/2015 & 5/23/2016	27	May 28, 2019	May 28, 2039	Low Income Families/Special Needs
Oak Grove South	August 28, 2017	75	December 9, 2019	December 9, 2039	Senior Housing
International Blvd Apts	December 5, 2016	18	December 11, 2019	December 11, 2039	Low Income Families (08)
Camino 23	May 23, 2016	26	December 20, 2019	December 20, 2039	Low Income Families/Special Needs
Fruitvale Transit Village - Phase IIA a.k.a. Casa Arabella	May 23, 2016	66	December 20, 2019	December 20, 2039	Low Income Families/VASH (20)
The Town Center	December 5, 2016	50	January 10, 2020	January 9, 2040	Low Income Families (08)
3706 San Pablo Avenue	June 1, 2015	10			Low Income Families

Additional vouchers awarded	May 23, 2016	5	February 25, 2020	February 25, 2040	
Additional vouchers awarded	May 8, 2017	5			
Eastside Arts & Housing	February 27, 2017	10	January 29, 2020	December 29, 2040	Low Income Families (08)
Embark Apartments	May 23, 2016	61	February 24, 2020	February 24, 2040	Affordable Housing for Veterans / VASH (31)
Courtyards at Acorn	December 5, 2016	27	January 10, 2020	January 9, 2040	Low Income Families (08)
Bishop Roy C. Nicholas	December 5, 2016	16	March 12, 2020	March 12, 2040	Low Income Seniors (08)
Empyrean	October 24, 2016	32	June 15, 2020	June 15, 2040	Low Income Families
Northgate Apts	December 5, 2016	14	October 29, 2020	October 29, 2040	Low Income Families (08)
Oak Street Apts	December 5, 2016	25	December 16, 2020	December 15, 2040	Low Income Seniors
3268 San Pablo	June 25, 2018	50	February 18, 2021	February 18, 2041	Senior Housing
Paseo Estero 9% (Brooklyn Basin 1A)	February 1, 2018	3	February 25, 2021	February 24, 2041	Low-income families
Paseo Estero 4% (Brooklyn Basin 1B)	February 1, 2018	47	February 25, 2021	February 24, 2041	Low-income families
Vista Estero (Brooklyn Basin 2)	February 1, 2018	82	February 25, 2021	February 24, 2041	Low-income seniors
Oak Grove North	August 28, 2017	77	March 8, 2021	March 7, 2041	Low-income seniors
Nova Apartments	July 23, 2018	56	May 12, 2021	May 11, 2041	Permanent Supporting Housing
Sylvester Rutledge Manor	December 5, 2016	64	July 15, 2021	July 14, 2036	Low Income Seniors (08)
Aurora Apartments	July 23, 2018	43	July 21, 2021	July 20, 2041	special needs
Fruitvale Studios	June 25, 2018	12	April 27, 2022	April 26, 2042	formerly homeless and special needs
Coliseum Place	May 23, 2016	37	May 19, 2022	May 18, 2042	Homeless, HOPWA and Low-income
Foon Lok West (Brooklyn Basin 3)	February 26, 2018	65	May 23, 2022	May 22, 2042	Low Income Families/Special Needs
Kenneth Henry Court	February 27, 2017	15	May 31, 2022	May 30, 2042	Low-income families (08)
	Units under HAP Contract	4,510			

AHAP Contracts	Date of BoC approval	# PBV Units	AHAP Contract Date	Population Served
95th and International	April 29, 2019	27	May 20, 2021	formerly homeless/low-income families

Fruitvale Transit Village Phase IIB	June 25, 2018	75	July 9, 2021	families and seniors
Foon Lok East (Brooklyn Basin 4)	February 26, 2018	61	May 9, 2022	low income families/special needs
7th and Campbell <i>Additional vouchers awarded</i>	July 23, 2018	20	April 12, 2022	formerly homeless
	February 1, 2019	19		formerly homeless
W Grand and Brush	July 23, 2018	28	July 14, 2022	formerly homeless
Ancora Place	April 29, 2019	31	July 28, 2022	low-income families/special needs
Units under AHAP Contract		261		

Conditional Awards	Date of BoC approval	# PBV Units	AHAP Contract Date	Population Served
3801 MLK Family Housing	July 23, 2018	16	<i>pending</i>	families and special needs
34th and San Pablo	July 23, 2018	25	<i>pending</i>	Low-income families
Friendship Senior Housing	April 29, 2019	34	<i>pending</i>	special needs/seniors
285 12th St	July 22, 2019	16	<i>pending</i>	formerly homes/low-income families
additional VASH vouchers	June 27, 2022	8	<i>pending</i>	PBV VASH
500 Lake Park Ave	February 3, 2020	14	<i>pending</i>	PBV VASH
additional VASH vouchers	June 27, 2022	4		
2700 International Blvd	January 23, 2023	19	<i>pending</i>	PBV VASH
Units with conditional award		136		
Disposition Pending and NOFA Invitations and Pending ORED projects				
OHA Senior Disposition Sites	October 16, 2017	101	TPV award June 2018	Public Housing Disposition
15th and Harrison	TBD	100	<i>pending conditional</i>	low-income families
RAD Conversion (Chestnut/Linden/LLC/Foothill and Mandela Gateway)	CY2019	307	special PBV	low-income families
		508		

Total PBV Units Allocated 5,415

Appendix B

Overview of Other Housing

Overview of Other Housing					
	Total Unit Count	Subsidy Layering - Public Housing	Subsidy Layering - Project Based Voucher	Other HUD Funding	Unsubsidized/ Manager Units
HOPE VI Sites					
Chestnut Court	72	45			1
Linden Court	79	38			1
Mandela Gateway	168	46	30		2
Foothill Family Apartments	65	21	11		1
Lion Creek Crossings - Phases 1 - 5	567	157	171		5
Other Mixed Developments					
Tassafaronga Village - Phases 1 and 2	157		99	19	2
Cathedral Gardens	100		43	5	1
Keller	201			157	33
Harrison Senior	73		11	62	1
Lakeside Senior Apts.	92		91		1
Prosperity Place	71		35	8	1
ACTS/CYRENE	59		14		1
Brooklyn Basin (Paseo and Vista Estero, Foon Lok West, Foon Lok East)	465		258		4
Empyrean	66		32		1
AveVista	68		34		1
Oak Grove North and South	151		149		2
Total Units	2454	307	978	243	58

Appendix C

Affordable Housing Development Activities

Affordable Housing Development Activities by Unit Type							
	FY 2023 Outcomes Non-traditional Units	FY 2023 Outcomes Traditional Units	FY 2023 Outcomes Manager Units	Total Units	Public Housing	Project- Based Vouchers	Tax Credit Only
BoC APPROVED PROJECTS							
IN PREDEVELOPMENT							
285 12th Street	48	16	1	65	0	24	41
500 Lake Park	34	18	1	53	0	18	35
Mandela Station Affordable	178	60	2	240	0	60	180
Foothill Family Apartments	32	32	1	65	21	11	33
Harrison Tower	0	100	1	101	0	100	1
Coliseum Way	36	0	1	37	0	0	37
The Phoenix	100	0	1	101	0	0	101
2700 International	74	0	1	75	0	19	56
3050 International	75	0	1	76	0	0	76
Friendship Senior	49	0	1	50	0	0	50
<i>Total in Predevelopment</i>	626	226	11	863	21	232	610
UNDER CONSTRUCTION							
Brooklyn Basin 4 (Foon Lok East)	62	61	1	124	0	61	63
<i>Total Under Construction</i>	62	61	1	124	0	61	63
NEW CONSTRUCTION PLACED IN SERVICE							
Brooklyn Basin 3 (Foon Lok West)	64	65	1	130	0	65	65
<i>Total Placed in Service</i>	64	65	1	130	0	65	65
COMPLETED REHABILITATION							
OAHPI	0	89	0	1,539	44	1,539	0
<i>Total Rehabilitation</i>	0	89	0	1,539	44	1,539	0
COMBINED TOTAL	752	441	13	2,656	0	1,897	738

Appendix D

MTW and Non-MTW Housing Stock

**FY 2023 MTW Housing Inventory
MTW and Non-MTW housing stock**

End of FY 2023

MTW PUBLIC HOUSING

Large Family Sites

Campbell Village	154
Lockwood Gardens	372
Peralta Villa	<u>390</u>
	916

Designated Senior Sites

Adel Court	30
Palo Vista Gardens	100
Harrison Towers	<u>101</u>
	231

HOPE VI Sites

Linden Court	38
Mandela Gateway	46
Chestnut Court	45
Foothill Family Apts.	21
Lion Creek Crossings Phase 1	45
Lion Creek Crossings Phase 2	54
Lion Creek Crossings Phase 3	37
Lion Creek Crossings Phase 4	<u>21</u>
	307

TOTAL PUBLIC HOUSING 1,454

VOUCHER (SECTION 8) AND OTHER HUD PROGRAMS

MTW

General MTW Housing Choice Voucher (HCV)	13,107
Included are Non-Elderly Disabled (NED)	85
Included are Pre-2008 FUP allocation	48

Non -MTW

Veterans Affairs Supportive Housing (VASH)	526
Mainstream	212
Family Unification Program (FUP)	51
Foster Youth to Independence (FYI)	49
Emergency Housing Vouchers (EHV)	515
Stability Vouchers (SV)	81
Tenant Protection Vouchers	101
Tenant Based Vouchers	46

TOTAL VOUCHERS 14,821

Other HUD Programs

Shelter plus Care (S+C)	331
Moderate Rehabilitation (Mod Rehab)	143
TOTAL OTHER HUD PROGRAMS	474
TOTAL VOUCHERS AND OTHER HUD PROGRAMS	15,295
MTW LOCAL PROGRAMS	
Parents and Children Together (PACT)	20
Local Housing Assistance Program (LHAP)	7
Sponsor-based Housing Assistance Program (SBHAP)	180
Building Bridges SRO	192
Building Bridges SRO/shared & transitional	61
Building Bridges THP+	50
Building Bridges CalWORKs	50
Building Bridges Key To Home	23
Homekey	180
Tax Credit Units with no Traditional Subsidy	1,141
TOTAL LOCAL PROGRAMS	1,904
TOTAL	18,653

Appendix E

Glossary of Acronyms

AMI – Area Median Income. HUD estimates the median family income for an area in the current year and adjusts that amount for different family sizes so that family incomes may be expressed as a percentage of the area median income. Housing programs are often limited to households that earn a percent of the Area Median Income.

AMP – Asset Management Project. A building or collection of buildings that are managed as a single project as part of HUD’s requirement that PHAs adopt asset management practices.

ARRA – American Recovery and Reinvestment Act. Signed into law by President Obama to provide economic stimulus. The Act includes funding for PHAs to spend on capital improvements.

ASCO – Alameda County Sheriff’s Office

BB – Building Bridges Initiative

BBSRO – Building Bridges Single Room Occupancy program

BBTHP+ - Building Bridges Transitional Housing Program Plus

BBCalWORKs – Building Bridges CalWORKs program

BBKTH - Building Bridges Key To Home program

COLA – Cost of Living Adjustment. The federal government adjusts assistance programs, such as Social Security, annually based on changes in the cost-of-living index. The adjustment is a percentage amount that is added to the prior year’s amount.

EBALDC- East Bay Asian Local Development Corporation

EHV – Emergency Housing Vouchers

FCP – OHA’s Department of Family and Community Partnerships.

FPFY – First Place for Youth (vendor for BBTHP+)

FSS – Family Self-Sufficiency. A program operated by a PHA to promote self-sufficiency of families in the Section 8 and Public Housing programs.

FY – Fiscal Year. A 12-month period used for budgeting and used to distinguish a budget or fiscal year from a calendar year. OHA’s fiscal year runs from July 1 through June 30.

FYE – Fiscal Year End. OHA’s fiscal year end is June 30.

FYI – Foster Youth to Independence Vouchers

HAP – Housing Assistance Payment. The monthly payment by a PHA to a property owner to subsidize a family’s rent payment.

HCV – Housing Choice Voucher. Sometimes referred to as a Section 8 voucher or tenant-based voucher, the voucher provides assistance to a family so that they can rent an apartment in the private rental market.

HOPE VI – Housing Opportunities for People Everywhere. A national HUD program designed to rebuild severely distressed public housing. The program was originally funded in 1993.

HQS – Housing Quality Standards. The minimum standard that a unit must meet in order to be eligible for funding under the Section 8 program.

HUD – United States Department of Housing and Urban Development. The Federal government agency responsible for funding and regulating local public housing authorities.

LHAP – Local Housing Assistance Programs. Under this MTW Activity, OHA has developed local housing programs that provide support to households that might not qualify for or be successful in the traditional Public Housing and/or Section 8 programs.

Mod Rehab – Moderate Rehabilitation. The Section 8 Moderate Rehabilitation program provides project-based rental assistance for low-income families. Assistance is limited to properties previously rehabilitated pursuant to a HAP contract between an owner and a PHA.

MOMS – Maximizing Opportunities for Mothers to Succeed. A partnership between OHA and the Alameda County Sheriffs Department. The program provides 11 units of service enriched housing for women leaving the county jail system and reuniting with their children.

MTW – Moving to Work. A national demonstration program for high performing public housing authorities. OHA has named its MTW program “Making Transitions Work”.

NED – Non-Elderly Disabled vouchers. This is a voucher program that provides subsidies to families where the head of household or a family member is disabled but not a senior citizen.

NOFA – Notice of Funding Availability. As part of a grant process, NOFAs are issued to dictate the format and content of proposals received in response to funding availability.

NSPIRE – National Standards for the Physical Inspection of Real Estate, the new inspection protocol replacing HQS and UPCS.

OGN / S – Oak Groves North and Oak Groves South

OHA – Oakland Housing Authority.

PACT – Parents And Children Together. A partnership between OHA and the Alameda County Sheriff's Office. The PACT site provides service enriched housing for women and men leaving the county jail system and reuniting with their children who are participating in the MOMs and DADs program.

PBV – Project Based Voucher. Ongoing housing subsidy payments that are tied to a specific unit.

RA – Reasonable Accommodation

REAC – Real Estate Assessment Center. A HUD department with the mission of providing and promoting the effective use of accurate, timely and reliable information assessing the condition of HUD's portfolio; providing information to help ensure safe, decent and affordable housing; and restoring the public trust by identifying fraud, abuse and waste of HUD resources.

RFP – Request for Proposals. As part of a procurement or grant process, RFPs are issued to dictate the format and content of proposals received in response to funding availability.

RFQ – Request for Qualifications. As part of a procurement or grant process, RFQs are issued to dictate the format and content of proposals received in response to funding availability.

RHF – Replacement Housing Factor. These are Capital Fund Grants that are awarded to PHAs that have removed units from their inventory for the sole purpose of developing new public housing units.

SBHAP – Sponsor Based Housing Assistance Programs

SRO – Single Room Occupancy. A unit that only allows occupancy by one person. These units may contain a kitchen or bathroom, or both.

SSA – Alameda County Social Services Agency

TANF – Temporary Assistance to Needy Families. A Federal assistance program providing cash assistance to low-income families with children.

TPV – Tenant Protection Voucher. A voucher issued to families displaced due to an approved demolition/disposition request, natural disaster, or other circumstance as determined by HUD. The vouchers provide families with tenant-based rental assistance that they can use in the private rental market.

VASH – Veterans Affairs Supportive Housing. This HUD program combines tenant-based rental assistance for homeless veterans with case management and clinical services provided by the Department of Veteran's Affairs at their medical centers and community-based outreach clinics.

VAWA – Violence Against Women Act

MAKING YEARS OF THRIVING TOGETHER

TRANSITIONS WORK

FY 2023 ANNUAL REPORT

Board of Commissioners Meeting

October 23, 2023

Presented by Dominica Henderson, Chief Social Impact Officer

Presentation Guide

- Glossary
- MTW Baseline
- Goals and Outcomes
- MTW Highlights
- Questions

Making Transitions Work

ANNUAL REPORT



Oakland Housing
Authority

FISCAL YEAR 2023
JULY 1, 2022 – JUNE 30, 2023

Glossary

- AHAP Agreement to Enter a Housing Assistance Payment contract
- BB Building Bridges
- Dispo Disposition of public housing units
- FSS Family Self-Sufficiency
- HAP Housing Assistance Payment
- HCV Housing Choice Voucher
- LHAP Local Housing Assistance Program
- MTW Moving to Work
- PBV Project Based Voucher
- RAD Rental Assistance Demonstration
- SBHAP Sponsor-Based Housing Assistance Program
- TPV Tenant Protection Voucher



Preliminary MTW Baseline



MTW Program	Baseline Average
MTW Public Housing	1,336
MTW Voucher	11,262
Local Non-Traditional	1,233
Total Numerator	13,831 Families Served

MTW Program	Inventory
MTW Public Housing	1,166
MTW Voucher	12,974
Total Denominator	14,140 Families

Preliminary Baseline # of Families Served = 13,831/14,140 or 97.8%

Goals and Outcomes

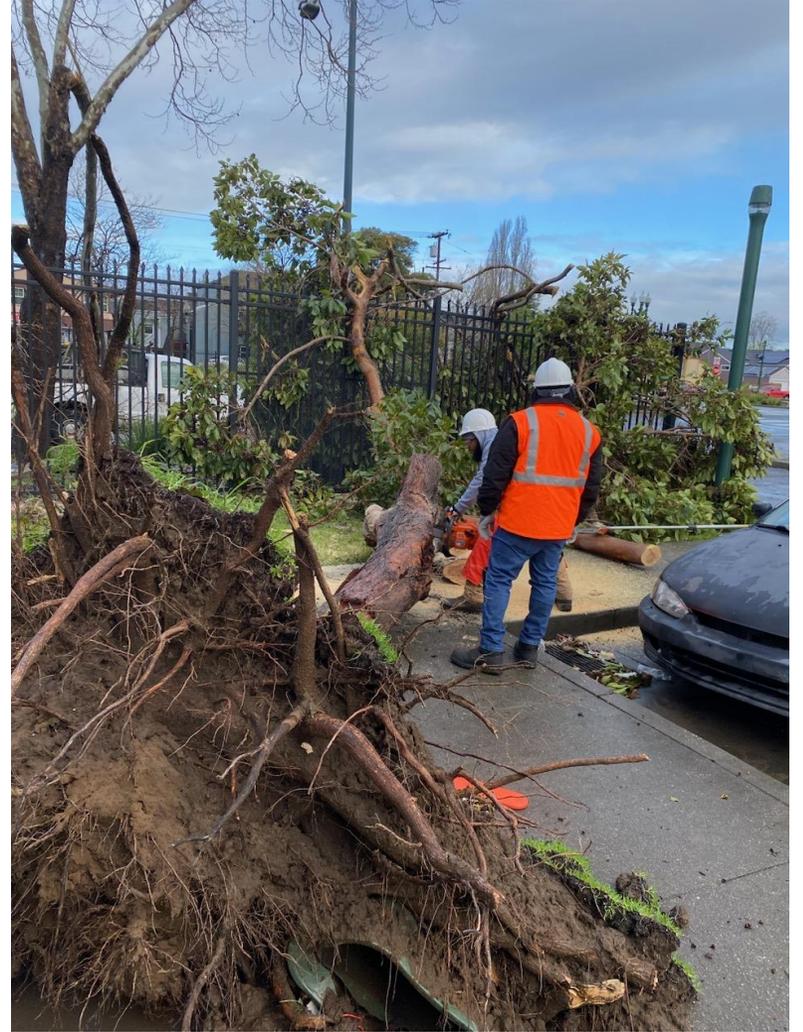
GOAL #1

Sustained high standards of customer service for residents and stakeholders

OUTCOMES

- Owner Incentives
- 127 participants received housing search services
- 226 residents provided lease compliance support
- 287 residents received cleaning supplies for unit maintenance
- 24-hour support during weather incidents





Goals and Outcomes

GOAL #2

Position OHA as a sustained leader in the preservation of units and expansion of affordable housing

OUTCOMES

- Renovated 133 units (PH-44, OAHPI- 89)
- Pre-development funding to assist 3 sites; 358 new units in development for Oakland
- Fully leased Foon Lok West
- 61% completion of Foon Lok East



Foon Lok West Lobby Mural



Rehabbed Exterior



Brooklyn Basin Construction Aerial



Renovated Interior

Goals and Outcomes

GOAL #3

Provide sustained, impactful and humane resident services, community engagement and community safety programs

OUTCOMES

- Food pantries served over 400 households monthly, introduced delivery option
- 2,900 users of OHAPD's Tip 411



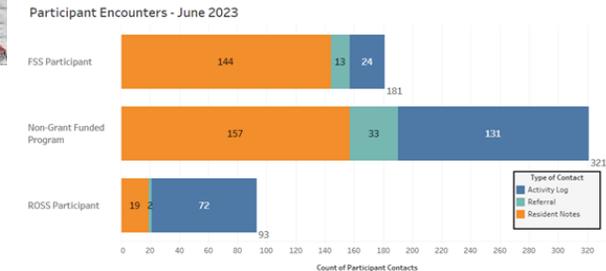
Goals and Outcomes

GOAL #4

Expand Board knowledge of OHA and its affiliates

OUTCOMES

- Board of Commissioners retreat
- Departmental Dashboards



MTW Highlights

Served **1,480 Non-OHA Families** in FY 2023
1,233 LNT Families served/month



Single Fund Flexibility

- OHAPD
 - Conducted **9,000 patrol checks** of
 - Supported 48 special events and 56 community meetings
- FCP
 - **Enrolled 150 students** in the Youth Employment Program
 - 56 residents benefitted from the Employment Industry Training Contracts
 - Digital equity initiative launched to expand **free broadband to eight public housing sites**



Questions

Credits



Prepared by: Julie Christiansen and Melissa Benik

With contributions from Teela Carpenter, Joetta Farrow, Ahmed Karimi, Anna Kaydanovsaky, Vicki Kolen, Caroline Barnett, Carmella Farr, Martha Jimenez, Jamie Manalang, Hanan Albatayn, Krinzia Lopez, Clara Velasco, Deni Adaniya, Erika McLitus, Alex Waggoner, Anders Lee, Jose Romero and Jonathan Young



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

^{DS}
PW

SUBJECT: Creation of Executive Director Evaluation Ad Hoc Committee, and Assignment of Commissioners to Executive Director Evaluation Ad Hoc Committee by Chairperson pursuant to Oakland Housing Authority Bylaws and Commission Rules & Procedures.

DATE: October 23, 2023

Type: Action

2023-940

ACTION REQUESTED

Staff recommends the ratification by the Commission for the creation of Executive Director (ED) Evaluation Ad Hoc Committee, and assignment of Commissioners to Executive Director (ED) Evaluation Ad Hoc Committee by Chairperson pursuant to Oakland Housing Authority Bylaws and Commission Rules & Procedures.



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

^{DS}
PW

SUBJECT: Adopt a resolution authorizing the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 004 Loc 1021 SEIU MAINT Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

DATE: October 23, 2023

Type: Consent

2023-894

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Local 1021 SEIU Maintenance Unit which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67.

This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the “By Group” method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority’s nine (9) groups are as follows:

CalPERS		NonPERS/ICMA
CODE	BARGAINING UNIT/GROUP	CODE
001	Unrepresented	701
002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes and explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact:

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority’s contribution towards the premium cost for employees’ CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the agreements, memorandum of understandings between the Authority and the bargaining units, and unrepresented employees.

Attachments:

[Reso 004 LOC 1021 SEIU MAINT UNIT.2024](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

**FIXING THE EMPLOYER CONTRIBUTION AT AN EQUAL AMOUNT FOR
EMPLOYEES AND ANNUITANTS UNDER THE PUBLIC EMPLOYEES' MEDICAL
AND HOSPITAL CARE ACT WITH RESPECT TO A RECOGNIZED EMPLOYEE
ORGANIZATION 004 LOC 1021 SEIU MAINT UNIT**

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Local 1021, SEIU Maintenance Unit; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Director to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October, 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

DS
PW

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 001 Unrepresented Group, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

DATE: October 23, 2023

Type: Consent

2023-902

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Unrepresented Group which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS

CODE

001

BARGAINING UNIT/GROUP

Unrepresented

NonPERS/ICMA

CODE

701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes and explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the

agreements, memorandum of understandings between the Authority and the bargaining units, and unrepresented employees.

Attachments:

[Reso_001_UNREPRESENTED.2024 \(4\)](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER:

**ADOPT A RESOLUTION FOR THE EXECUTIVE DIRECTOR TO APPROVE THE
PUBLIC EMPLOYEES SYSTEM (CALPERS) RESOLUTION FOR THE 001
UNREPRESENTED GROUP, FIXING THE AUTHORITY'S CONTRIBUTION UNDER
THE PUBLIC EMPLOYEES' MEDICAL AND HOSPITAL CARE ACT (PEMHCA).**

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Unrepresented Group; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Direction to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director DS
PW

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 002 Alameda Co Bldg Construct Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

DATE: October 23, 2023

Type: Consent

2023-903

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Alameda County Building and Construction Trades Council unit which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS

CODE

001

BARGAINING UNIT/GROUP

Unrepresented

NonPERS/ICMA

CODE

701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes and explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

-

Fiscal Impact:

-

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the agreements, memorandum of understandings between the Authority and the bargaining units,

and unrepresented employees.

Attachments:

[Reso 002 ALAMEDA CO BLDG CONSTRUCT](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 002 Alameda Co Bldg Construct Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Alameda County Building and Construction Trades Council; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Direction to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October, 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

^{DS}
PW

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 005 Loc 1021 SEIU APA/HAR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

DATE: October 23, 2023

Type: Consent

2023-905

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Local 1021 SEIU APA/HAR Unit which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS	BARGAINING	NonPERS/ICMA
CODE	UNIT/GROUP	CODE
001	Unrepresented	701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes and explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the agreements, memorandum of understandings between the Authority and the bargaining units, and unrepresented employees.

Attachments:

[Reso 005 LOC 1021 SEIU APA](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 005 Loc 1021 SEIU APA/HAR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Local 1021, SEIU APA/HAR Unit; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Direction to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of the Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director DS
PW

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 006 Loc 29 OPEIU Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

DATE: October 23, 2023

Type: Consent

2023-906

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Local 29 OPEIU Unit which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS

CODE

001

BARGAINING UNIT/GROUP

Unrepresented

NonPERS/ICMA

CODE

701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes an explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact:

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the agreements, memorandum of understandings between the Authority and the bargaining units,

and unrepresented employees.

Attachments:

[Reso 006 LOC 29 OPEIU.2024](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 006 Loc 29 OPEIU Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Local 29, OPEIU: and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Direction to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October, 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

^{DS}
PW

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 701 Unrepresented ICMA RETR Group, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

DATE: October 23, 2023

Type: Consent

2023-907

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Unrepresented Group in the ICMA Retirement Plan which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS

CODE

001

BARGAINING UNIT/GROUP

Unrepresented

NonPERS/ICMA

CODE

701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes an explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact:

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as

required by California Public Retirement System (CalPERS), and to comply with the agreements, memorandum of understandings between the Authority and the bargaining units, and unrepresented employees.

Attachments:

[Reso 701 UNREPRESENTED ICMA RETR.2024](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 701 Unrepresented ICMA RETR Group, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Unrepresented Group in the ICMA Retirement plan; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Direction to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October, 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director 

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 702 Alameda Co Bldg. ICMA RETR, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

DATE: October 23, 2023

Type: Consent

2023-908

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Alameda County Building and Construction Trades Council in the ICMA Retirement plan which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS

CODE

001

BARGAINING UNIT/GROUP

Unrepresented

NonPERS/ICMA

CODE

701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes an explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact:

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the

agreements, memorandum of understandings between the Authority and the bargaining units, and unrepresented employees

Attachments:

[Reso 702 ALAMEDA CO BLDG ICMA RETR.2024](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 702 Alameda Co Bldg. ICM RETR, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Alameda County Building and Construction Trades Council in the ICMA Retirement plan; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Direction to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October, 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

ds
PW

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 706 Loc 29 OPEIU ICMA RETR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

DATE: October 23, 2023

Type: Consent

2023-909

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Local 29 OPEIU Unit in the ICMA Retirement plan, which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS

CODE

001

BARGAINING UNIT/GROUP

Unrepresented

NonPERS/ICMA

CODE

701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes an explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact:

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the agreements, memorandum of understandings between the Authority and the bargaining units,

and unrepresented employees.

Attachments:

[Reso 706 LOC 29 OPEIU ICMA RETR.2024](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 706 Loc 29 OPEIU ICMA RETR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA).

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Local 29, OPEIU in the ICMA Retirement plan; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That he executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Direction to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October, 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

DS
PW

SUBJECT: Adopt a Resolution for the Executive Director to approve the Public Employees System (CalPERS) Resolution for the 704 Loc 1021 SEIU ICMA RETR Unit, Fixing the Authority's Contribution under the Public Employees' Medical and Hospital Care Act (PEMHCA)

DATE: October 23, 2023

Type: Consent

2023-923

RECOMMENDATION

This memorandum transmits for your approval a CalPERS Health Resolution for the Local 1021 SEIU Maintenance Unit in the ICMA Retirement plan which changes (increases) the Authority's contribution amount towards active employees' and retirees' CalPERS Health Plan premiums. Pursuant to CalPERS regulations, a change in employer contribution can only be accomplished through a resolution signed by the Board.

FISCAL IMPACTS/CONSIDERATION

Funding for this increase is included in the FY 2024 Budget line 4110-03-004, 4610-02-004, 4210-01-004, & 4410-05-004 approved by the Board of Commissioners on June 26, 2023.

BACKGROUND

The Authority has participated in the CalPERS Health Benefit Program since 1995 and contracts with the Public Employees Medical and Hospital Care Act (PEMHCA) under the "By Group" method, which means we are required to submit a separate resolution for each group to increase the employer contribution amount. The list and assigned codes of the Authority's nine (9) groups are as follows:

CalPERS	BARGAINING	NonPERS/ICMA
CODE	UNIT/GROUP	CODE
001	Unrepresented	701

002	Building Trades Council	702
004	Local 1021, SEIU Maintenance	704
005	Local 1021, SEIU APA/HAR	--
006	Local 29, OPEIU	706

The Authority has active and retired employees in both CalPERS and International City/County Management Association (ICMA) retirement systems. Therefore, as stated above, resolutions must be adopted separately for each group.

Effective, January 1, 2009, CalPERS adopted criteria pursuant to Senate Bill 1123 (SB1123) for making changes to certain employee benefits, specifically providing certification of adherence to Government Code 7507. Specifically, GC 7507 requires that before an employer adopts certain benefits changes for their employees, employers must provide at a public meeting at least two weeks before implementation of benefit changes and explanation of the future cost impact. Therefore, the Authority must submit an updated resolution, which contains the acknowledgement and understanding of the current and future cost of the changes in benefits.

Fiscal Impact

Change in the employer contribution amounts are regularly based on the board approved contract agreements between Local 29, OPEIU, Local 1021 Maintenance, Local 1021 APA/HAR, and the Alameda County Building and Construction Trades Council. Specifically, the language states that the Authority's contribution towards the premium cost for employees' CalPERS selective health plan would increase by the amount equal to the Kaiser Family Plan Premium increase for each year.

The increase for the 2024 year is \$279.95 from the 2023 year. Therefore, the contributions amount will change (increase) from a maximum of \$2,375.72 to a maximum of \$2,655.67. This change represents a 10.54% increase above the 2023 plan year maximum contribution amount.

Funds to cover the Authority's contribution amount increase are funded in the FY2024 budget.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the attached resolution as required by California Public Retirement System (CalPERS), and to comply with the agreements, memorandum of understandings between the Authority and the bargaining units, and unrepresented employees.

Attachments:

[Reso 704 LOC 1021 MAINT ICMA RETR.2024](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED: NUMBER:

**FIXING THE EMPLOYER CONTRIBUTION AT AN EQUAL AMOUNT FOR
EMPLOYEES AND ANNUITANTS UNDER THE PUBLIC EMPLOYEES' MEDICAL
AND HOSPITAL CARE ACT WITH RESPECT TO A RECOGNIZED EMPLOYEE
ORGANIZATION 704 LOC 1021 SEIU ICMA RETR**

WHEREAS, Oakland Housing Authority is a contracting agency under Government Code Section 22920 and subject to the Public Employees' Medical and Hospital Care Act (the "Act") for participation by members of the Local 1021, SEIU Maintenance Unit in the ICMA Retirement plan; and

WHEREAS, Government Code Section 22892(a) provides that a contracting agency subject to the Act shall fix the amount of employer contribution by resolution; and

WHEREAS, Government Code Section 22892(b) provides that the employer contribution shall be an equal amount for both employees and annuitants, but may not be less than the amount prescribed by section 22892(b) of the Act; and

RESOLVED, That the employer contribution for each employee and or annuitant shall be the amount necessary to pay the full cost of his/her enrollment, including the enrollment of family members, in a health benefits plan up to a maximum of \$2655.67 per month, plus administrative fees and Contingency Reserve Fund assessments; and

RESOLVED, Oakland Housing Authority has fully complied with any and all applicable provisions of Government Code Section 7507 in electing the benefits set forth above; and

RESOLVED, That the participation of the employees and annuitants of Oakland Housing Authority shall be subject to determination of its status as an “agency or instrumentality of the state, or political subdivision of a State” that is eligible to participate in a governmental plan within the meaning of Section 414(d) of the Internal Revenue Code, upon publication of final Regulations pursuant to such Section. If it is determined that Oakland Housing Authority would not qualify as an agency or instrumentality of the state or political subdivision of a State under such final Regulations, CalPERS may be obligated, and reserves the right to terminate the health coverage of all participants of the employer; and

RESOLVED, That the executive body appoint and direct, and it does hereby appoint and direct, the Human Resources Director to File with the Board a verified copy of this resolution, and to perform on behalf of the Oakland Housing Authority all functions required of it under the Act; and

RESOLVED, That coverage under the Act be effective on January 1, 2024.

Adopted at a meeting of the Board of Commissioners at 1619 Harrison Street Oakland, California, this 23rd day of October, 2023.

Signed: _____
Patricia Wells, Secretary / Executive Director

Attest: _____
Anne Griffith, Chair of Board of Commissioners



Oakland Housing Authority

TO: Board of Commissioners

FROM: Patricia Wells, Executive Director

^{DS}
PW

SUBJECT: Adopt a resolution authorizing the Executive Director to purchase commercial property insurance from the HAI Group for the period of November 11, 2023 to November 11, 2024, and to make payment of the annual premiums in the amount not to exceed \$350,000.

DATE: October 23, 2023

Type: Consent

2023-934

RECOMMENDATION

Authorizing the Executive Director to purchase Commercial Property Insurance with HAI Group (Housing Authority Insurance Group) for the period of November 11, 2023 to November 11, 2024, and to make the payment of the annual premium in the amount not to exceed \$350,000.

FISCAL IMPACTS/CONSIDERATION

Authorizing \$350,000 for the one-year term, included in the Authority's approved FY 2023 annual operation budget, budget line item #4510-00-000.

BACKGROUND

The Authority is renewing its Commercial Property insurance effective on November 11, 2023. The policies contain a \$100,000,000 loss per occurrence in coverage through Housing Authority Property Insurance (HAPI), a licensed insurer under HAI Group, providing commercial property and liability insurance coverage to public housing authorities. These are recommendations of the risk management consulting firm we have engaged to advise on coverage limits.

The quoted annual premium for the property policy is \$331,012 for the period of November 11, 2023, to November 11, 2024. The policy has a \$100,000 deductible per loss.

ANALYSIS

There is a 17% (\$47,488) increase in commercial property insurance premiums for the agency from \$283,524 in the previous year to the projected amount of \$331,012 for the current renewal. This is primarily driven by market forces in the commercial property insurance sector. Since these costs have not yet been finalized, the request for funding not to exceed \$350,000 is believed to be sufficient to obtain sufficient coverage limits for this renewal period.

*The Authority is not required to solicit quotes from other brokers based on the HUD Waiver. U.S. Department of Housing and Urban Development dated: August 22, 2019 24 CFR 965.205(a)(b) Waiving bidding requirements of the Annual Contributions Contract are hereby waived.

ACTION REQUESTED

It is recommended that the Board of Commissioners approve the resolution authorizing the Executive Director to purchase Commercial Property Insurance from the HAI Group and to make payment of the annual premium in amounts not to exceed \$350,000.

Attachments:

[Commercial Property Insurance Resolution](#)

**THE BOARD OF COMMISSIONERS OF THE
HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA**

On Motion of Commissioner:

Seconded by Commissioner:

and approved by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

EXCUSED:

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER:

**ADOPT A RESOLUTION AUTHORIZING THE EXECUTIVE DIRECTOR TO
PURCHASE COMMERCIAL PROPERTY INSURANCE FROM THE HAI GROUP AND
TO MAKE PAYMENT OF THE ANNUAL PREMIUMS IN THE AMOUNT NOT TO
EXCEED \$350,000**

WHEREAS, the Oakland Housing Authority's ("Authority") Commercial Property Insurance Policy is due for renewal for the period of November 11, 2023 to November 11, 2024; and

WHEREAS, the Authority is a member of the Housing Authority Insurance Group (HAI Group), a nonprofit, tax-exempt risk retention group owned by public housing authorities; and

WHEREAS, HAI Group is qualified under HUD regulations as being substantially equivalent to a "financially sound and responsible insurance company"; and

WHEREAS, HUD permits public housing authorities to select HAI Group for insurance coverage without following the normal bidding requirements; and

WHEREAS, the Authority received an initial indication that the commercial property insurance coverage premium will be \$331,012.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF
THE HOUSING AUTHORITY OF THE CITY OF OAKLAND, CALIFORNIA:**

THAT, the Board of Commissioners authorizes the Executive Director to purchase the Commercial Property Insurance from the HAI Group and to make the payment of the premiums in the amount not to exceed \$350,000; and

THAT, the Executive Director, on behalf of the Authority, is hereby authorized to take all actions necessary to implement the foregoing resolution.

*I certify that the foregoing resolution is a full, true and correct
copy of a resolution passed by the Commissioners of the Housing Authority
of the City of Oakland, California on October 23, 2023.*

Patricia Wells, Secretary / Executive Director

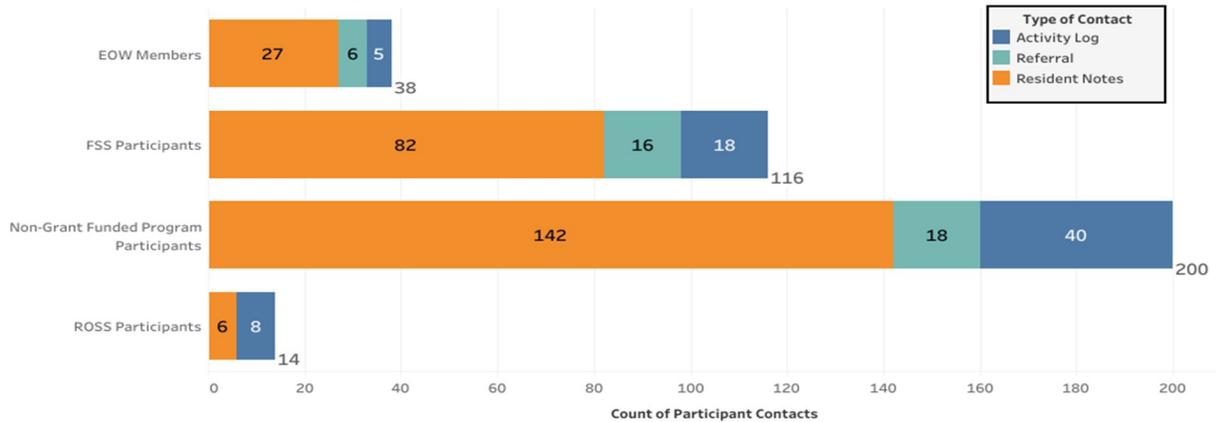
ADOPTED:

RESOLUTION NO.

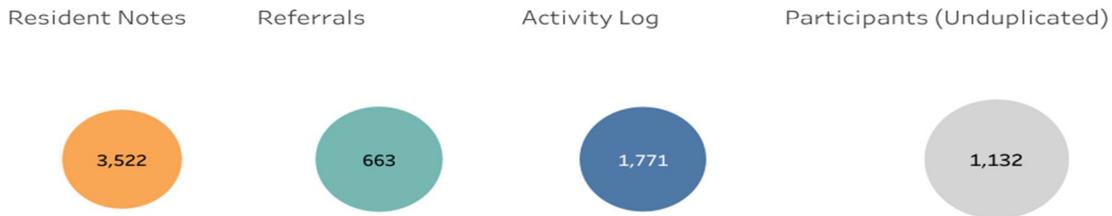
Family & Community Partnerships Department Oakland Housing Authority Monthly Status Report September 2023

FCP Participant Encounters

Participant Encounters - September 2023



2023 YTD Participant Encounters



Family Self-Sufficiency (FSS)

Program	Total	New Enrollees	Escrow Accounts	Graduates	Escrow Disbursed	Termination or Exits	Escrow Forfeited
Section 8	186	2	97	0	\$0	1	\$0
PH	26	1	7	0	\$0	2	\$0
FUP-Youth	13	0	6	0	\$0	0	\$0
FYI	14	0	0	0	\$0	0	\$0
Total	239	3	110	0	\$0	3	\$0

- Three (3) residents enrolled into the FSS program of which one was a port in from the City of Alameda Housing Authority.
- Twenty-two (22) FSS participant(s) were contacted to review and update their Individual Training Service Plans (ITSP) for program graduation.

Economic Development

Employment Support

Assistance Type	FSS	Section 3	General	TOTAL
Career Development	0	1	1	2
Financial Literacy	2	0	0	2
Resume/Cover Letter Writing	0	0	3	3
Job Referral	0	0	3	3
Total	2	1	7	10

Job Fair

Event	OHA Participants	Community Participants	Total
OHA & Alameda County Social Services job fair	40	74	114

New Hires

FCP Program	Interviewed	Hired Part-Time	Hired Full-Time	Company	Position
FSS	1	0	1	San Leandro Chrysler Dodge	Parts Clerk
General	1	1	0	Ryde Trans	Driver
General	1	1	0	Intercom Security	Security Guard
General	1	1	0	Intercom Security	Security Guard
Total	4	3	1		

Section 3

Trade/Position	Residents Working	Residents Searching	# of Requests	# of Positions	# Referred	Compliance Reports Issued
Carpentry	7	3	1	1	0	1
Cement Mason	1	0	0	0	0	0
Electrician	1	0	6	6	0	1
Iron Workers	0	1	7	7	0	1
Laborer	7	0	0	0	0	0
Floor layer	0	0	20	20	0	1
Sprinkler Fitter	0	0	11	11	0	2
Painter	0	1	0	0	0	1
Total	16	5	45	45	0	7

Career Development and Training

Program	New Enrollment	Completed	Total
Guard Card	0	2	2
Total	0	2	2

Homeownership Program

- Assisted two (2) current homeowners with post purchase assistance with mortgage-related issues with lenders and educated them on their options regarding relocation.
- Ten (10) residents attended the monthly homeownership program Q &A session.
- Twenty-two (22) residents received information about the homeownership program by phone or email.

Participants Pre-qualified for Homeownership (Lender-Qualified)

Voucher Size	# Families Searching	Average Household Income	Average Loan Amount
1 Bedroom	N/A	N/A	N/A
2 Bedrooms	2	\$72,035	\$402,500
3 Bedrooms	N/A	N/A	N/A
4 Bedrooms	N/A	N/A	N/A

Homeownership Applicants

Homeownership Eligibility	Approved for Mortgage	Executed Purchase Contract/In Escrow	Closings	Homes Purchased (YTD)	Homes Purchased Outside of Oakland (YTD)
18	2	0	0	2	0

Homeownership Program Participants

Current Homeowners	Total Homes Purchased (Since 2004)	Program Terminations (YTD)	Program Graduates (YTD)	Pending Refinance	Total Homes Refinanced (YTD)
67	123	2	1	0	0

East Oakland Works (EOW) Jobs Plus Initiative

EOW Program	New Enrollments (Month)	Total (Members)	JPEID Amount	FSS Escrow Balance	Program Exits
EOW Members with JPEID	20	30	\$0	N/A	0

EOW Members with FSS Escrow	0	2	N/A	\$0	0
EOW Members Ineligible for Financial Incentives	1	1	N/A	N/A	0
Total	21	33	\$0	\$0	0

East Oakland Works (EOW) Jobs Plus Initiative

Twenty-one (21) Lockwood Gardens residents became members of the East Oakland Works (EOW) program. They completed intake in August, and their Financial Incentives became effective in September. Twenty (20) EOW members chose to enroll into the JPEID, and one (1) member was ineligible to participate in the financial incentive.

- Five (5) EOW members attended the Winning Wednesday Job Fair held on Wednesday, September 13, 2023.
- One (1) EOW member received assistance with updating his resume; he is looking to transition from being a driver to an office job.

EOW New Hires

EOW Program	Interviewed	Hired Part-Time	Hired Full-Time	Company	Position
EOW	1	1	0	IHSS	Caregiver

East Oakland Works (EOW) WIOA Orientation

EOW program partner Oakland Private Industry Council (OPIC) conducted their Workforce Innovation and Opportunity Act (WIOA) orientation and enrolled five (5) EOW members into their (WIOA) program. Upon enrollment, EOW members will have access to an employment counselor, vocational training, and additional employment supportive services.



Resident Opportunities for Self-Sufficiency (ROSS)

Program	ROSS Participants	New Enrollees (Month)	YTD (Exits)
Public Housing	123	0	24

- Twelve (12) ROSS participants opted to exit the program.

Socialization Activities

Activities	Residents
Positioned for Purpose	9



20th Annual Healthy Living Festival

In partnership Alameda County Supervisor, Nate Miley’s office, chartered several busses that transported seniors throughout Alameda County to the 20th Annual Healthy Living Festival at the Oakland Zoo. FCP staff and OHA Commissioner, William Mayes chaperoned fourteen (14) OHA senior residents from Lockwood Gardens, Peralta Village, Palo Vista Gardens, and Campbell Village. The seniors got the opportunity to enjoy a day of fun activities which included a listening to a live band, dancing, networking with seniors and vendors, exploring the zoo and having lunch. Over seventy (70) community organizations were in attendance and the seniors received program information, free samples, prizes and were encouraged to register for a variety of senior services.



Youth and Education

Lao Family Youth Employment Program

Participants	Enrolled this month	Enrolled in this contract term	Enrolled in Training	OJT Placements (Month)	OJT Placements (PTD)	College Enrollments
General	16	142	123	55	137	0
FYI	3	9	8	0	2	0
TOTAL	19	151	131	55	139	24

Promise Plus Program

Promise Plus Scholars program enrollment goal is two hundred and forty (240) scholars for the 2023-24 school year. At the end of last school year, twenty-four (24) scholars graduated high school, fourteen transferred to a non-partner school and five (5) scholars left OUSD.

The Promise Plus program retained one-hundred seventy-two (172) scholars at the partner school and fifty-six (56) at our non-partner schools. This school year, the Education team enrolled thirty-five (35) new scholars.

OUSD Schools	Previous Students Enrolled	New Enrollments	Total Enrollment
Prescott Elementary	16	4	20
Martin Luther King, Jr.	16	4	20
Lockwood Steam Academy	30	1	31
Markham Elementary	16	0	16
West Oakland Middle	24	6	30
Westlake Middle	4	0	4
Elmhurst Middle	7	5	12
Frick Impact Middle	20	4	24
McClymonds High	12	4	16
Oakland High	3	0	3
Fremont High	13	2	15
Castlemont High	11	5	16
Non-Partner Schools	42	14	56
Total	214	49	263

Supportive Services

- The Education team provided two (2) Promise Plus families with PPE bages
- The Education team assisted a new Promise Plus family with obtaining furniture and the three (3) youth received backpacks filled with school supplies.

Partner School Events

The education team attended Prescott Elementary Parent's Appreciation Breakfast with six (6) Promise Plus Scholars parents.



The education coordinator attended the Steph and Aisha Curry "Eat, Learn and Play" playground unveiling at Lockwood STEAM.



Special Programs

Family Unification Program (FUP) Youth

Family Unification Program (FUP) Youth

Applicants	Current Participants	New Enrollments (Current Month)	Transitioned to FSS	Program Exits to Date	Program Enrollments to Date
0	7	0	13	11	31

Foster Youth to Independence (FYI) Voucher Program

Applicants (Searching)	Current Participants (Housed)	Transitioned to FSS	Program Exits to Date
17	32	14	1

Foster Youth to Independence (FYI) Program Housing Workshop

Seventeen (17) FYI participants received housing search assistance, including housing listings, landlord communication coaching, and referrals for credit repair.

Housing Search Workshops

FCP hosted two (2) housing search workshops for any participant searching with an OHA voucher, and five (5) participants came and learned strategies to address barriers, market themselves to landlords, and find suitable listings.

Cleaning Kits

Household Cleaning Kits

Participant Request	Issued
52	52

Digital Inclusion

Tech Exchange – Digital Literacy Training Series

FCP partnered with Tech Exchange to provide digital literacy training with four (4) OHA residents to receive an Alcatel tablet device with three (3) months of mobile data.

T-Mobile Tablet/Chromebook Distribution

FCP Program	Tablets/Chromebooks (Month)	Program Total (YTD)
Education Initiative	0	0
Site Services	0	0
FSS	0	0
EOW	0	12
ROSS	1	2
General	2	3
Total	3	17

Health and Wellness

	Peralta Village	Lockwood Gardens	DoorDash Pantry	Total
Food bags provided	98	93	86	277
Residents served	231	229	164	624

Food Pantry

In collaboration with the Alameda County Community Food Bank, FCP conducted three (3) food pantries at Peralta Village, Lockwood Gardens, and facilitated a home delivery pantry in partnership with DoorDash. FCP received a donation of two hundred twenty-five (225) bread loaves from Semi Freddi's to complement the pantry bags.

Civic Engagement

OHA Resident Advisory Board (RAB)

Resident Advisory Board (RAB)

Status	Residents	Non-OHA	Total
RAB Committee Meetings	6	0	6
RAB Meeting	7	0	7
Total	13	0	13

- The Resident Advisory Board held its monthly hybrid meeting with seven (7) members in attendance with OHA leadership team.
- Six (6) RAB members attended the RAB debrief committee meeting.

Leased Housing Briefings

In collaboration with Leased Housing, FCP staff participated in the briefing voucher presentations.

Briefing Type	# of Meetings	Participants/Residents
HCV	3	12
PBV	3	8
Total	6	20

Site Intervention

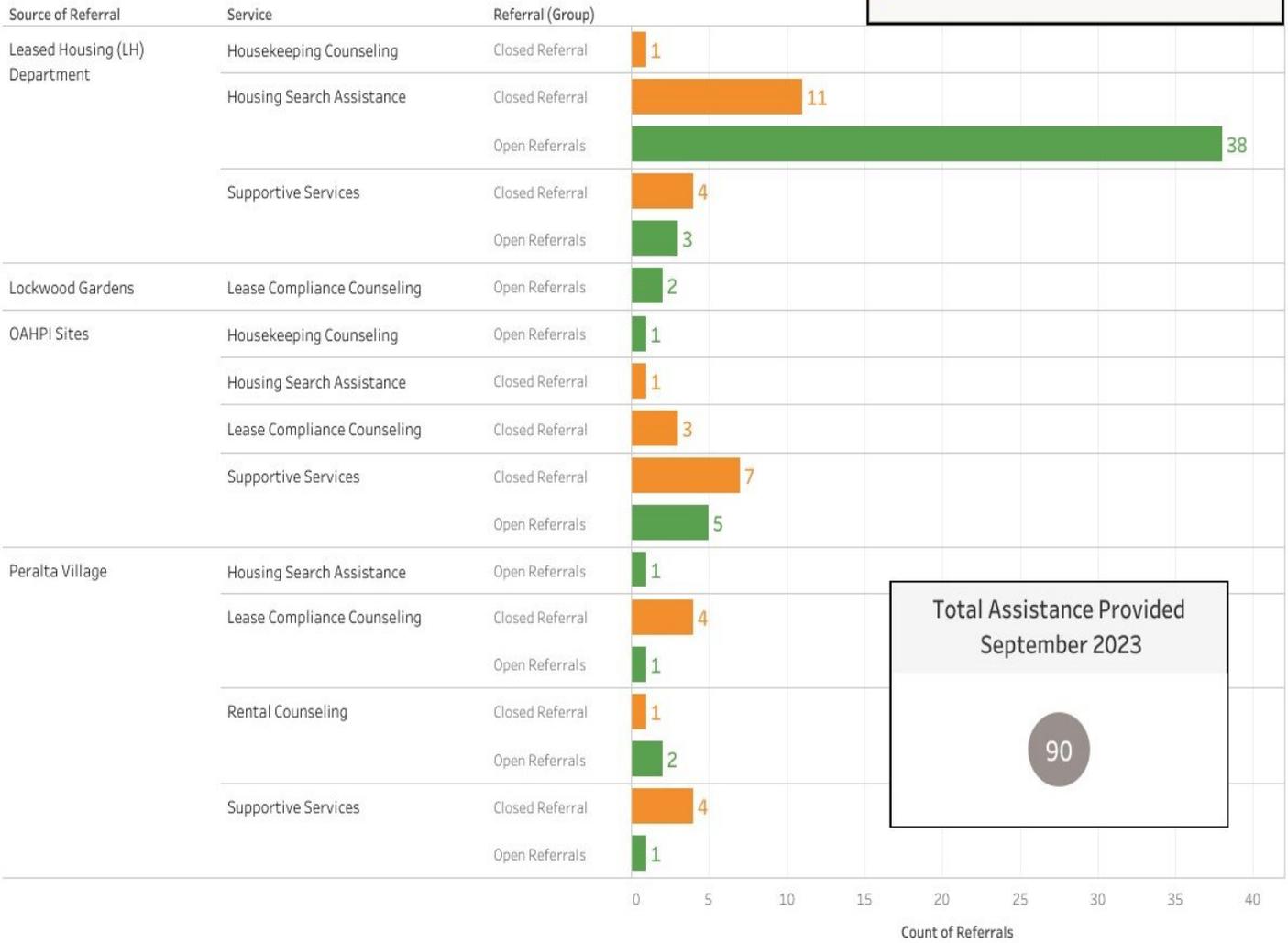
Site Meetings

FCP hosted six (6) site meetings in partnership with OAHPI, OHAPD, and the Green Team.

AMP	# of Meetings	Residents
AMP10	1	5
AMP 11	3	11
AMP 12	2	6
Total	6	22

Site Intervention Referrals - September 2023

■ Closed Referrals - Current Month
■ Open Referrals - Current and Prior Months



2023 YTD Summary

Referrals Opened

302

Referrals Closed

282

Leased Housing Department- September 2023 Report

2011 Housing Choice Voucher Waitlist

There are a total of **303** applicants on the waitlist. Staff have begun the process of exhausting the remaining applicants by inviting the applicant families to intake appointments in the month of October.

PBV to HCV Activity

- Thirty-five families remain on the Request List. Staff will invite these families to intake in October as a part of the exhausting of the 2011 HCV waitlist.

Virtual briefings FY24

IE Virtual Briefing Dates	# of families invited	# of families attended
July 2023	63	51
August 2023	83	75
September 2023	38	30

FY24 – 2022 OAHPI Wait List

Intake date	# of families invited	# of families attended	# of families Denied Program Admission	# Program Eligible pending TSV/leasing
July 2023	0	0	0	43
August 2023	0	0	0	38
September 2023	46	18	1	29

FY24 - 2014 Public Housing Wait List

Intake date	# of families invited	# of families attended	# of families Denied Program Admission	# Program Eligible pending TSV/leasing
August 2023	0	0	0	1
September 2023	0	0	0	1

FY24 - 2023 Public Housing Wait List

Intake date	# of families invited	# of families attended	# of families Denied Program Admission	# Program Eligible pending TSV/leasing
July 2023	0	0	0	0
August 2023	30	20	0	0
September 2023	0	0	0	9

Summary Report**August 2023****September 2023****Eligibility****Public Housing and OAHPI Eligibility:**

- Referred Households to OPO

13

5

Waitlist Activities and Port-in

- Intake appointments scheduled 2011 HCV waitlist/PBV to HCV list
- Intake appointments attended 2011 waitlist/PBV to HCV list
- Vouchers issued for applicants from the 2011 waitlist PBV to HCV list
- Vouchers issued for Port-In

0

0

0

0

0

0

19

13

OHA Relocation - Project-Based Vouchers (OAHPI)

- Relocation vouchers issued for OAHPI Households

0

0

Special Programs (including non-MTW)

- Vouchers issued HUD VASH
- Vouchers issued Mod Rehab

4

5

0

0

Total new vouchers issued (all V programs)

16

23

Total Denial of Admission/Withdrawals (all V programs)

8

0

Owner Services**Initial Inspections**

- Move-in inspections
- Passed Inspections
- New contracts (new, transfer, port-ins)

175

122

73

44

149

85

Rent Increases

• Rent increases requested	466	361
• Rent increases approved	255	203
• Rent increases denied/declined	14	46
• Rent increases pending review/HQS	191	80

Annual Inspections

• Total number of Annual Inspections performed	916	614
• Number of annual inspections passed	465	347
• Failed with owner and tenant items	258	142
• Inspections rescheduled, vacant, or canceled	33	27
• No Shows	160	98

Reasonable Accommodations

• Total number of requests received	60	67
• Total number approved	4	11
• Total number pending	50	49
• Total number denied	6	7

Occupancy/Special Programs

• Total annual recertification scheduled	397	448
• Total annual recertifications completed	272	287
• Total interim recertifications completed	301	329
• Transfer voucher within Oakland	53	54
• Field recertifications	0	0
• Portability vouchers issued	34	30
• Total no. of transfer vouchers issued	87	84
• Total no. of Decisions to Terminate Assistance	20	19
• Total Meet & Discuss appointments	6	6
• Resolution cases	269	204

Program Terminations

• Informal Hearings held	0	0
• Termination upheld	0	0
• Termination reversed	0	0
• Pending outcome	0	0
• Requests for Executive Review	0	0
• ER Termination upheld	0	0
• ER Termination reversed	0	0
• ER Outcome pending	1	1

Customer Service

• Walk-in visitors	1213	835
• 1540 Leased Housing main phone line	3066	2990
• Avg. calls/day to Customer Service	146	176
<u>LEP Calls</u>		
• Cantonese/Mandarin	35	48
• Spanish	19	50
• Vietnamese	02	06

Leased Housing Department Special Programs and Initiatives:

VASH

OHA has a total allocation of 526 VASH vouchers and 268 leased. OHA received 3 new referrals. OHA approved a conditional award of 18 vouchers to the Lake Park/EAH affordable housing project, 8 vouchers were awarded to 285 12th Street/EBALDC and 19 vouchers to 2700 International Blvd/Unity Council.

Mainstream

OHA's allocation for Mainstream vouchers (MS5/MS28) is 212; 185 utilized and 5 searchers. OHA has 22 Mainstream vouchers to issue and lease-up.

On December 19, 2022, OHA was awarded 50 additional vouchers and \$957,456 voucher funding and \$131,000 in Extraordinary Administrative fees. The Effective date was February 1, 2023.

Confidential Client Request (CCR) Policy

The purpose of this policy is to ensure OHA and OAHPI are in compliance with the provisions of the Violence Against Women's Act (VAWA) and to describe the procedures for processing VAWA and the Threat of Physical Harm requests, timely, effectively, fairly, and to maintain confidentiality. OAHPI PBV is recommending amending its transfer policy to allow a 5 to 1 ratio. For every five applicants housed, one transfer will be approved. If determined an imminent threat exists, OHA will offer transfer to vacant and available 3rd party PBV unit or if available a Housing Choice Voucher. The goal is to fill vacant available units with applicants in need of affordable housing on the existing OAHPI waitlist and not simply transfer internal housed residents. The Leased Housing Department received 12 CCR's for review and processing.

Portability

A total of 15 participant households ported in from other PHA's. OHA is absorbing all port in households except VASH and EHV.

There are 42 unabsorbed OHA participant families living in the jurisdiction of another housing authority. The majority are living in the following jurisdictions: Contra Costa County, Alameda County, City of Alameda, Berkeley, and Richmond.

The Housing Authority of Alameda County and Contra Costa Housing Authority are absorbing all port in program participants. OHA has a MTW activity that restricts portability to neighboring PHA's within 30 miles of OHA unless the receiving PHA is absorbing the voucher or family has one of 11 exceptions. Exceptions include emergency VAWA cases, employment, reasonable accommodations and educational needs.

Emergency Housing Vouchers/Stability Vouchers

The Department of Housing and Urban Development (HUD) allocated \$5 billion in American Rescue Plan (ARP) funds for emergency housing vouchers that will assist individuals and families who are experiencing or at risk of experiencing homelessness. The \$5 billion funding gives communities the resources needed to help eligible households find and remain in housing. HUD estimates that these Emergency Housing Vouchers (EHVs), alongside resources provided by the CARES Act, could help house 130,000 households nationwide.

In May 2021, HUD awarded the Oakland Housing Authority 515 EHVs. OHA has worked in partnership with its local Continuum of Care, the Coordinated Entry System, and other local Public Housing Authorities to advance and improve the housing outcomes of individuals most impacted in Alameda County.

Total Award	Total Leased/Utilized	Total Searching	Contracts Pending Activation	Applicants in Eligibility Screening/CBS
515	570	0	1	0

Owner Incentives

Per OHA's MTW plan, Leased Housing has launched four owner incentives: Vacancy Loss (Re-Rent Bonus), Pre-Qualifying inspections, Signing Bonus, and Owner Recognition and Unit Repair.

Vacancy Loss (Re-Rent Bonus)- Payment for up to two months HAP is offered to existing HCV owners if they re-rent a unit previously occupied by an HCV tenant to another HCV participant within two months of contract cancellation.

OHA paid \$73,334.93 in vacancy loss to 19 owners. Units had an average vacancy period of 98.9 days.

Pre-Qualifying Unit Inspections- A pre-qualifying unit inspection is offered to all HCV program owners to expedite the lease-up process and minimize delays or losses due to inspections. Inspections are not linked to a participant. Once a unit has passed, the owners will have up to 60 days to find a tenant.

OHA conducted 0 initial pre-inspection.

Signing Bonus - For new landlords who sign a contract with OHA allowing a voucher family to move into one of their available units, OHA will pay the owner a \$1,000 signing bonus. This is for all owners who sign a contract with OHA.

OHA paid 92 owners a \$1,000 bonus/\$92,000.

Apartment Repair Loan -OHA will reimburse owners up to \$2,250 for repairs made to fix Housing Quality Standard fail items on units that have never received HUD subsidy. OHA must verify the repairs. Once the Housing Assistance Payment (HAP) contract is signed and repairs are verified, OHA will reimburse the owner requests received within 30 days of HAP contract execution. This incentive launched in November 2021.

OHA paid Zero owners for a total of \$0.

New Contracts Entered for Owner Payment June 2023

PBV	33
HCV	42
HUD VASH	6
TRA/Shelter Plus	3
Mod Rehab	0
FYI/FUPF	1
Contracts Entered for Payment	85

Project Based Vouchers

Projects in the pipeline

Rent Increases

Leased Housing received 466 rent increase requests. There were 337 Housing Choice Vouchers completed. The average rate of increase was 11%, and the average amount approved was \$203.

Program Compliance Team

Program Compliance team is focused on the analysis, prevention or remedial action, if necessary, to prevent or correct program noncompliance by participants and owners. Program Compliance staff works with all the Leased Housing teams as well as the Oakland Housing Authority Police Department and the Executive Office. The team conducted 10 client interactive/warning meetings, processed 22 owner notification letters, processed 17 late rent notices, resolved 66 resolution cases and processed 23 proposed termination notices. There were \$26,217 calculated in subsidy overpayments.

Special Needs Housing

The Harrison Hotel is part of the County’s Shelter Plus Care program subsidizing 46 units, reported 100% lease up for formerly homeless disabled residents. The County refers applicants to OHA for intake and unit inspections.

Local Programs

Sponsor Based Housing Assistance Program (SBHAP)

The SBHAP initiative is a partnership with the City of Oakland to provide housing assistance to up to 180 households experiencing homelessness. This initiative leverages funding for supportive services as the City of Oakland funds providers who offer a variety of housing navigation and tenancy sustaining supports. The total FY 2024 budget is \$4,209,693.

The program can serve up to 180 households in FY24.

- a) Program Details - Services, Funders, Service Providers, and Target Population
 Total number of households to be served: **Minimum: 100, Maximum:180**

Oakland Housing Authority - OPRI Units			Min: 87 HH	Max: 180 HH
Services/ Funder	# of HH Served Min - Max.	Target Population	Supportive Services Provider	Housing Services Provider

PATH: Community Housing Services	27-30	Encampments/ Shelter	Lifelong Medical St. Mary's Center Building Futures w/ Women & Children	Abode Services
Behavioral Health Care Services	18 - 20	Encampments/ Shelter: Homeless. Serious Mental Illness	Lifelong Medical	Abode Services
TBD	20-40	Community Cabins	ROOTS	ROOTS
Oakland Department of Violence Prevention (Formally known as Oakland Unite): Dept. of Human Services	25-30	Re-entry: Adult Probation & Parole	Abode Services	Abode Services
PATH: ESG & THP+ Funding	17-20	Homeless Youth Ages 18-24 who are homeless or at-risk of homelessness and exiting the foster care or juvenile justice system	First Place for Youth	First Place for Youth
City of Oakland – HSD - CHS	20-40	Families experiencing homelessness, at risk of homelessness or victims of domestic violence	Building Futures for Women & Children	Building Futures for Women & Children

Building Bridges/CalWORKs

CalWORKs Building Bridges program provides a stable shallow housing subsidy (1-2 years) for Social Services Agency clients who are actively engaged in a plan to achieve

self-sufficiency, specifically employable, formerly homeless CalWORKs clients. The BOC approved a new Contract term is 5 years. Costs to not exceed \$2,400,000 over the five-year term; with \$,480,000 budgeted annually. Contract execution is in process. Invoices are billed quarterly.

An average of 30 families per month will receive a rental subsidy equal to the fair market rent based on unit size from OHA. Reasons for denial: Incomplete information, client exited from Housing Support Program by County, client request, non-compliance with CalWORKs program, or no inspection requested or passed.

Available	Referrals received	Households subsidized	Households in eligibility process/inspection
30	0	24	6

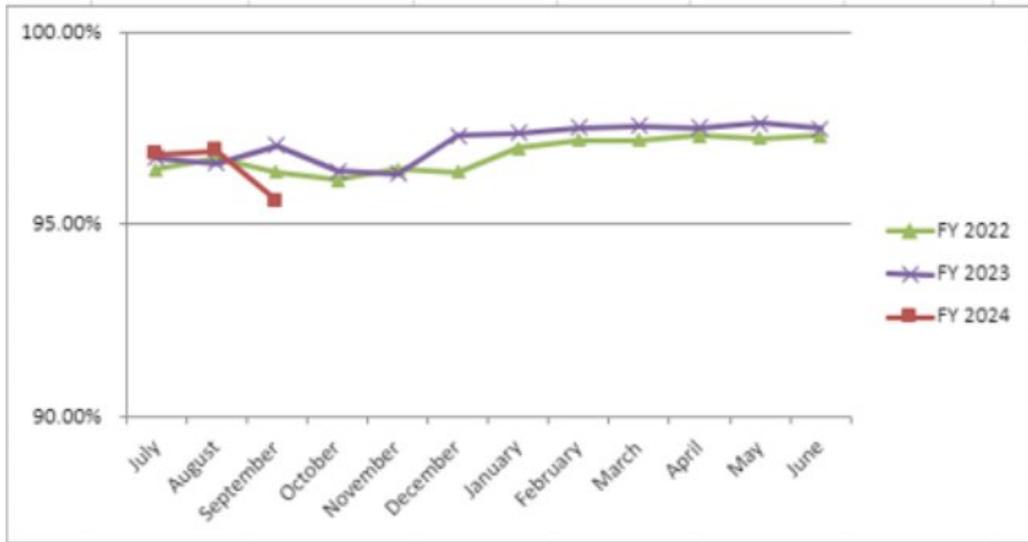
Local Housing Assistance Program/Single Room Occupancy – LHAP/SRO

As of September 2023, TOTALS	Total Units	Vacant or Non-Eligible Units	Eligible Units	Subsidy Per Unit
	311	127	184	\$933

Property Operations Department

Occupancy Report

Public Housing Occupancy Rates - TOTAL PORTFOLIO 95.61%



All Authority Public Housing Units

Month	Occupancy Rate
October 2022	96.38%
November 2022	96.31%
December 2022	97.30%
January 2023	97.38%
February 2023	97.51%
March 2023	97.56%
April 2023	97.51%
May 2023	97.64%
June 2023	97.50%
July 2023	96.84%
August 2023	96.91%
September 2023	95.61%

Authority Managed Public Housing Units

Development	Total Units	Non-dwelling Units/Exempt	Available Units	Occupied Units	Units in Turnover	Reserved Units	Vacant and Available	Previous Month Occupancy Rate	Current Month Occupancy Rate
Lockwood Gardens	372	2	370	357	9	0	4	95.12%	96.49%
Peralta Villa	390	1	389	375	12	2	0	96.39%	96.40%
Total	762	3	759	732	21	2	4	95.77%	96.44%

OAHPI Project Based Section 8 Units

Portfolio	Total Units	Excluded Units (HCEB)	Available Units	Occupied Units	Down Units	Units in Turnover	Reserved Units	Vacant and Available	Previous Month Occupancy Rate	Current Month Occupancy Rate
Deep East	278	10	268	249	12	1	2	4	91.42%	92.91%
East	258	0	258	232	13	0	7	6	86.05%	89.92%
Fruitvale	270	3	267	252	10	2	2	1	94.76%	94.38%
San Antonio	244	4	240	227	5	0	2	6	92.08%	94.58%
West	231	0	231	208	12	3	1	7	90.48%	90.04%
North	239	0	239	223	6	3	2	5	93.72%	93.31%
Total	1,520	17	1,503	1,391	58	9	16	29	91.42%	92.55%

OAHPI – PACT Program

Portfolio	Total Units	PACT Office	Program Units	Program Occupied Units	Employee Occupied Units	Down Units/CID	Units in Turnover	Application in process from ACSO	Reserved/Preleased Units	Vacant and Available	Previous Month Occupancy Rate	Current Month Occupancy Rate
East	20	1	19	3	0	0	0	0	0	16	15.79%	15.79%

Recertification Report

Authority Managed Public Housing Units

Development	Completed Annual Recertifications	Recertifications/Outstanding	Recertifications/Legal	Current Month Backlog
Lockwood Gardens	14	14	1	13
Peralta Villa	11	5	1	4
Total	25	19	2	17

Tenant Rent Collections**Authority Managed Public Housing Units**

Development	Charged	Collected	Percent Collected
Lockwood Gardens	\$156,993	\$134,045	85.38%
Peralta Village	\$135,027	\$109,408	81.03%

OAHPI Project Based Section 8 Units (Includes HAP)

Portfolio	Charged	Collected	Percent Collected
Deep East	\$606,894	\$459,647	75.74%
East	\$572,870	\$450,829	78.70%
Fruitvale	\$646,647	\$578,348	89.44%
San Antonio	\$549,800	\$490,264	89.17%
West	\$509,331	\$441,929	86.77%
North	\$595,641	\$488,805	82.06%

Tenant Accounts Receivables**Authority Managed Public Housing Units**

Development	0-30 Days	31-60 Days	61-90 Days	90+ Days	Prepays	Total TARs
Lockwood Gardens	\$104,050	\$85,502	\$260	\$987,757	(\$79,791)	\$1,177,569
Peralta Villa	\$97,068	\$78,930	\$0	\$674,931	(\$63,815)	\$850,929

* Includes Current and On-Notice Tenant Rent and Misc. charges.

OAHPI Project Based Section 8 Units Tenant Rent

Portfolio	0-30 Days	31-60 Days	61-90 Days	90+ Days	Prepays	Total TARs
Deep East	\$118,140	\$106,418	\$378	\$1,682,132	(\$99,897)	\$1,907,068
East	\$116,533	\$104,271	\$609	\$2,177,369	(\$64,973)	\$2,398,781
Fruitvale	\$94,488	\$79,714	(\$164)	\$1,126,251	(\$80,542)	\$1,300,289
San Antonio	\$66,569	\$40,921	(\$1,819)	\$728,761	(\$101,286)	\$834,431
West	\$90,256	\$62,288	\$574	\$899,590	(\$107,554)	\$1,052,708
North	\$90,450	\$60,053	\$16,491	\$1,132,417	(\$159,491)	\$1,299,411

* Includes Current and On-Notice Tenant Rent and Misc. charges.

OAHPI Project Based Section 8 Units Housing Assistance Payments (HAP)

Portfolio	0-30 Days	31-60 Days	61-90 Days	90+ Days	Prepays	Total HAP Owed
Deep East	\$45,539	\$46,274	\$0	\$987,077	\$0	\$1,078,890
East	\$54,085	\$48,090	\$0	\$920,529	\$0	\$1,022,704
Fruitvale	\$32,183	\$36,815	(\$2,761)	\$740,443	(\$202)	\$806,680
San Antonio	\$35,121	\$70,738	\$1,504	\$862,090	(\$6,945)	\$969,453
West	\$47,276	\$52,199	\$891	\$1,043,524	(\$1,239)	\$1,142,651
North	\$54,507	\$50,817	\$1,261	\$994,405	(\$1,443)	\$1,100,990

* Current and On-Notice tenants only

Authority Managed Public Housing Units

Development	0-30 Days	31-60 Days	61-90 Days	90+ Days	Prepays	Total TARs
Lockwood Gardens	\$702	\$856	\$0	\$127,398	(\$5,197)	\$128,956
Peralta Villa	\$1,211	\$2,955	\$0	\$101,342	(\$4,186)	\$105,508

*Past and Evicted tenants

OAHPI Project Based Section 8 Units Tenant Rent

Portfolio	0-30 Days	31-60 Days	61-90 Days	90+ Days	Prepays	Total TARs
Deep East	\$458	\$495	\$688	\$575,081	(\$98,288)	\$576,722
East	\$0	\$0	\$0	\$361,315	(\$22,163)	\$361,315
Fruitvale	\$841	\$7,308	\$0	\$431,197	(\$25,596)	\$439,346
San Antonio	\$0	\$378	\$0	\$305,819	(\$12,646)	\$306,197
West	\$2,400	\$3,010	\$0	\$169,140	(\$26,195)	\$174,550
North	\$473	\$330	\$672	\$191,796	(\$26,081)	\$193,271

*Past and Evicted tenants

OAHPI Project Based Section 8 Units Housing Assistance Payments (HAP)

Portfolio	0-30 Days	31-60 Days	61-90 Days	90+ Days	Prepays	Total HAP Owed
Deep East	\$803	\$0	(\$378)	\$443,074	(\$8,487)	\$443,499
East	\$0	\$0	(\$284)	\$338,062	(\$13,171)	\$337,778
Fruitvale	\$0	\$0	\$0	\$196,667	(\$3,379)	\$196,667
San Antonio	\$0	\$2,422	\$0	\$184,976	(\$7,114)	\$187,398
West	\$1,573	(\$967)	(\$1,568)	\$213,512	(\$2,806)	\$212,550
North	\$5,104	\$5,104	\$0	\$239,470	(\$3,994)	\$249,678

* Past and Evicted tenants

Work Order Report

Work Order Report - Authority Managed Public Housing Units

Development	Total Units	Beginning of Month Open WOs	Opened Within Date Range	Closed Within Date Range	Current Month Remaining Open WOs
Lockwood Gardens	372	234	202	167	269
Peralta Villa	390	68	245	251	62
Total	762	302	447	418	331

Work Order Report – OAHPI Project Based Section 8 Units

Portfolio	Total Units	Beginning of Month Open WOs	Opened Within Date Range	Closed Within Date Range	Current Month Remaining Open WOs
Deep East	278	313	120	173	259
East	278	293	135	200	228
Fruitvale	270	116	162	178	100
San Antonio	244	150	86	92	144
West	231	269	186	167	288
North	239	282	138	128	292
Total	1,540	1,423	827	938	1,311

Legal Report**Legal Report – Authority Managed Public Housing Units**

Month	Voluntary Move Out/Abandonment	Eviction	Total Vacated	Balance
October 2022	0	0	0	-
November 2022	0	0	0	-
December 2022	0	0	0	-
January 2023	0	0	0	-
February 2023	0	0	0	-
March 2023	0	0	0	-
April 2023	0	0	0	-
May 2023	0	0	0	-
June 2023	0	1	1	-
July 2023	0	0	0	-
August 2023	0	0	5	23,116.56
September 2023	0	0	0	-

Legal Report – OAHPI Project Based Section 8 Units

Month	Voluntary Move Out/Abandonment	Eviction	Total Vacated	Balance
October 2022	0	0	0	-
November 2022	1	0	1	21,655.00
December 2022	0	0	0	-
January 2023	0	0	0	-
February 2023	3	0	3	153,430.24
March 2023	2	0	2	36,682.23
April 2023	0	0	0	-
May 2023	1	0	1	8,765.19
June 2023	0	0	0	-
July 2023	0	0	0	-
August 2023	1	0	1	116,397.73
September 2023	0	0	0	-

Resource Conservation Community Engagement and Outreach

Authority Managed Public Housing Units

Development	Site Assessments	Resident Contact	Flyer Outreach
Lockwood Gardens	0	0	357
Peralta Villa	2	0	375
Total	2	0	732

OAHPI Project Based Section 8 Units

Portfolio	# of Sites Visited	Site Assessments (includes multiple visits)	Resident In-Person Contact	Flyer Outreach	In-Person Site Meetings
Deep East	0	0	0	249	0
East	5	5	8	232	4
Fruitvale	3	3	10	252	3
San Antonio	5	5	1	227	1
West	1	1	1	208	1
North	0	0	0	223	0
Total	14	14	20	1,391	9

Emergency Rental Assistance Program

*Emergency Rental Assistance Program information is a cumulative summary of payments received

Emergency Rental Assistance - OAHPI Project Based Section 8 Units

Portfolio	Number of Residents Processed to Date	Assistance Processing	Number of Residents Paid to date	Assistance Received	Total Dollars
Deep East	31	\$0	20	\$194,304	\$194,304
East	13	\$0	6	\$49,368	\$49,368
Fruitvale	12	\$0	7	\$42,054	\$42,054
San Antonio	35	\$0	20	\$126,241	\$126,241
West	23	\$0	15	\$127,436	\$127,436
North	28	\$0	19	\$114,755	\$114,755

Emergency Rental Assistance – Authority Managed Public Housing Units

Portfolio	Number of Residents Processed to Date	Assistance Processing	Number of Residents Paid to date	Assistance Received	Total Dollars
Lockwood Gardens	77	\$0	17	\$95,966	\$95,966
Peralta Village	54	\$0	46	\$164,052	\$164,052

**Additional Rental Assistance Resources
OAHPI Project Based Section 8 Units**

Portfolio	Alameda County	BACS	City of Oakland	EDC	Total Dollars
Deep East	\$0	\$3,233	\$3,146	\$10,512	\$16,891
East	\$0	\$10,467	\$0	\$6,648	\$17,115
Fruitvale	\$0	\$0	\$1,623	\$15,563	\$17,186
San Antonio	\$4,785	\$0	\$10,789	\$14,473	\$30,047
West	\$2,604	\$32,290	\$2,062	\$47,167	\$84,123
North	\$0	\$10,796	\$7,238	\$0	\$18,034

**Additional Rental Assistance Resources
Authority Managed Public Housing Units**

Portfolio	Alameda County	BACS	City of Oakland	EDC	Total Dollars
Lockwood Gardens	\$0	\$0	\$9,937	\$0	\$9,937
Peralta Village	\$0	\$562	\$7,238	\$0	\$7,800

Capital Improvement Department

Unit Renovations

	OHA	OAHPI
Units Completed and Returned to OPO in September	2	0
Units Received from OPO in September	8	9
Units Completed in 2024 Fiscal Year to Date	8	11

These unit renovations are complete turns, typically stripped down to the sheetrock. They include:

- Asbestos abatement in walls and flooring if present
- Re-textured and painted
- Kitchen and bathroom cabinet replacements including granite countertops
- New bathtubs and new plumbing fixtures
- All the mill work gets replaced i.e. doors, frames, floor molding, closet doors etc.
- Electrical panels are moved to new, code approved locations
- All smoke and carbon monoxide detectors are rewired to the main panel
- Installation of new, always on, bath fans to improve indoor air quality
- Replacement of all flooring and carpeting
- Added light fixtures on the ceilings of living and bedroom areas

OHA/OAHPI Completed in September

- 1116 Kirkham
- 901 Kirkham
- 1127 Foothill Fire

Larger Projects In the Preconstruction/Construction Process:

- 9514 Birch St. exterior, site, and landscape rehab
- Lockwood Gardens exterior rehab
- 3287 Lynde St. tree into building
- 9506 Birch St. fire repairs
- 6309 Baker St. Exterior Rehab
- 837 60th St. dry rot
- 90th Ave. Siding Replacement

Administrative Buildings

- Service Center driveway asphalt R&R, reseal, and stripe
- Additional card reader locations
- 1619 Harrison rooftop HVAC unit sound attenuation
- 1619 Harrison automatic doors
- 1805 Seismic retrofit design

Status Changes

Over the past three months, CID has pulled Force Account staff out of the unit turns on the request of the BTC. This has caused a significant reduction in the number of units CID has turned monthly since the beginning of the fiscal year. We will be doubling the BTC staff in the coming months to replace the FA staff that was pulled out. This will get us back closer to the average number of units we are used to—15.

During the same period, we have received significantly more units from OPO that typical. Many of these are coming from public housing. With our reduced forces and the increase in numbers of units, we have had difficulty keeping within the 30 day turn times we are used to. Overall inventory has more than doubled from a low of 29 in June to 66 at the end of September.

We expect after hiring that those numbers will again be reduced over a few months, and ultimately down to a target rate of 10 or less units in CID inventory on an ongoing basis. That is likely 9-12 months out depending on the number of transfer requests that come in.

6309 Baker St. Progress Photos



New fence, trash enclosure, ADA walkway, and landscaping.

Oak Groves Rehab - OHA/RAMP Development



Oak Groves is an acquisition/rehabilitation low-income housing tax credit, tax exempt bond project for 151 units of formerly public housing for low-income seniors in two buildings in downtown Oakland.

Project Description:

<i>Project Address:</i> 620 17 th St. & 570 16 th St.	<i>Affordability Targeting:</i> 30-60% of AMI
<i>Project Type:</i> Acquisition/Rehabilitation	<i>Architect:</i> Okamoto-Saijo Arch.
<i>Number of Units:</i> 151	<i>General Contractor:</i> BBI Construction Inc.
<i>PBVs:</i> 149	<i>Property Management:</i> John Stewart Co.
<i>Target Population:</i> Low-Income Seniors	<i>Total Development Cost:</i> \$86.4MM

Permanent Funding Sources:

• Tax Exempt Perm Loan: \$23,600,000	• OHA Ground Lease Loan \$599,901
• Seller Carryback Loan: \$34,400,000	• Release of Forward Commit. Fee: \$472,000
- Accrued/Deferred Interest: \$1,729,173	• Deferred Developer Fee: \$7,878,529
• OHA Sponsor Loan \$15,000,000	• GP Equity \$100
	• Tax Credit (LP) Equity \$46,003,264

OHA Board Authorizing Resolutions:

- No. 4696, 07/25/16: Okamoto-Saijo Architecture Contract
- No. 4728, 07/27/17: BBI General Contractor Contract
- No. 4743, 04/03/17: Overland Pacific & Cutler Relocation Contract
- No. 4767, 08/28/17: HUD Section 18 Disposition and PBV Award
- No. 4801, 04/09/18: Okamoto-Saijo Architecture Budget Increase
- No. 4803, 06/04/18: BBI General Contractor Contract Amendment
- No. 4837, 09/24/18: OHA as Development Partner and Option to Lease Land & Improvements
- No. 4838, 09/24/18: Creation of New OAHPI Development Corporation
- No. 4848, 02/11/19: Section 18 Disposition and Financing and Withdrawal of OHA Development LLC from Partnership
- No. 4869, 05/13/19: Substitute RAMP for OAHPI in RHI Oak Groves LLC and Execute County Environmental Land Use Covenants
- No. 4880, 07/22/19: Amend Resolution 4848 to Update Financing
- No. 4890, 10/14/19: OHA as Co-Guarantor with RAMP and Unit Count Confirmation
- No. 4898, 12/09/19: Add California Bank & Trust as Co-lender
- No. 4899, 12/19/19: Amend Resolution 4898 to Remove California Bank and Trust as Co-lender and Reapprove US Bank as Sole Lender

Affiliate Board Authorizing Resolutions:

- No. 19-001, 07/09/19: Secure Financing
- No. 19-002, 07/09/19: Secure Financing, Implement Rehabilitation, and Act as Guarantor-Developer
- No. 19-003, 10/22/19: Amendment to Resolution No. 19-001 to Clarify Existing Guarantee Obligations, have OHA Act as Co-Guarantor until Environmental Closure, to Authorize Patricia Wells to Execute Documents Previously Executed by Eric Johnson, and to Confirm the Unit Count
- No. 19-004, 10/22/19: Amendment to Resolution No. 19-002 to Clarify Existing Guarantee Obligations, have OHA Act as Co-Guarantor until Environmental Closure, to Authorize Patricia Wells to Execute Documents Previously Executed by Eric Johnson
- No. 19-005, 10/22/19: Enter into Assignment & Assumption Agreement with OHA for Relocation Contract and Amend Contract to Add Moving Services
- No. 19-006, 10/09/19: Partnership Co-lender Bifurcation
- No. 19-007, 10/09/19: Add California Bank & Trust as Co-Lender and Bifurcate Construction/Permanent Loan Using Two Promissory Notes - one Recourse to RAMP and the Partnership and one Non-recourse
- No. 19-008, 12/09/19: Amend No. 19-005: Amend Relocation Contract, Secure Temporary Housing with Extended Stay America, and Contract with Chipman Movers
- No. 19-009, 12/19/19: Amend No. 19-006: Re-approve US Bank as Sole Lender and Remove California Bank & Trust as Co-lender
- No. 19-010, 12/19/19: Amend No. 19-007: Re-approve US Bank as Sole Lender and Remove California Bank & Trust as Co-lender
- No. 20-003, 05/05/20: Barbara Sanders Project Management Services Contract
- No. 22-011, 07/22/22: Amend No. 20-003: Increase Budget of Barbara Sanders Project Management Services Contract
- No. 23-003: 04/24/23: Amend No. 22-011: Increase Budget and Extend Term of Barbara Sanders Project Management Services Contract

Approved OHA/Affiliate Funding: RAMP: \$100 GP Equity	Disbursements to Date: \$100 GP Equity
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Current Project Status: Work is complete on Oak Grove North and Oak Grove South.

Construction Progress: % Complete: 100%	New Hires: Number of New Hires: 161 Number of Section 3 Hires: 47 % Section 3: 29.19%
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Construction Contract Status:	
Original Contract Amount	\$44,117,725
Approved Change Orders	\$ 5,803,671
Final Contract Amount	\$49,921,396

- Milestones Completed:
- Project converted to permanent financing on 3/16/23.
 - Project audited cost certification completed on 5/4/23.
- Oak Grove North**
- The building is complete and fully occupied
 - LIHTC 8609 / Placed In Service approval is pending
- Oak Grove South**
- The building is complete and fully occupied
 - LIHTC 8609 / Placed in Service approval is pending

Harrison Tower – OHA/RAMP Development



Harrison Tower, a 101-unit senior public housing development, was approved for a Section 18 Disposition by HUD in July 2018. This approval will allow the property to be refinanced utilizing tax-exempt bonds, conventional debt, and low income housing tax credits to modernize all building systems and renovate the 100 senior apartments and one (1) manager's unit.

In addition to substantially rehabilitating all residential units, the 3rd floor residential amenities and property management/ services offices will be reconfigured and updated, and seismic upgrades will be performed throughout the building which will include the garage and the Authority's offices on the 1st and 2nd floors.

Project Description:

<i>Project Address:</i> 1621 Harrison Street	<i>Affordability Targeting:</i> 50% AMI or less
<i>Project Type:</i> Rehabilitation	<i>Other Uses:</i> OHA Headquarters
<i>Number of Units:</i> 101	<i>Architect:</i> Saida +Sullivan Architects
<i>PBVs:</i> 100	<i>General Contractor:</i> To be determined
<i>Target Population:</i> Seniors	<i>Property Management:</i> To be determined
	<i>Total Development Cost:</i> \$86.4M (includes \$30.1M Seller Carryback Loan)

Targeted Permanent Funding Sources:

- Conventional Mortgage
- Project Based Section 8
- Tax Credit (LP) Equity
- GP Equity
- OHA Loan
- OHA Seller Carryback Loan
- Deferred Developer Fee

OHA Board Authorizing Resolutions – None to date

Affiliate Board Authorizing Resolutions:

- OAHPI No. 19-006, 5/31/19: Arch. and Engineering Contract with Saida + Sullivan Design Partners
- OAHPI No. 20-001, 5/5/20: Construction Manager contract with Buis Construction Services, Inc.
- OAHPI No. 20-009, 10/19/20: First Amendment to Saida + Sullivan Design Partners Contract
- OAHPI No. 21-002, 2/9/21: Relocation Consultant Contract with Overland Pacific & Cutler
- OHA No. 5137, 1/23/23: Approve and Adopt Harrison Tower Relocation Plan

Approved OHA/Affiliate Funding:

\$2,100,000 in FY24 OHA Budget

Disbursements to Date:

\$1,223,103

Current Project Status:

Predevelopment: Resident relocations are ongoing. As of September 7, 2023, twelve (12) residents have completed their relocations, six (6) residents are pending final processing, and the remaining two (2) residents of the first batch of 20 HUD-approved TPV voucher holders are actively searching for housing. The nonlinear structural engineering analysis and updated structural engineering plans are nearly complete. The architect and MEP engineer are working to update their plans to accommodate the changes and work out any plan conflicts with the structural team.

Milestones Completed Past Month: Predevelopment activities are ongoing.

Partnerships with Nonprofit Developers

Brooklyn Basin Master Plan

The Authority, in partnership with the City of Oakland and MidPen Housing, is engaged in developing 465 units of affordable housing for low-income families and seniors as part of the Brooklyn Basin master planned community.

The Brooklyn Basin project (formerly known as “Oak to Ninth”) is a large scale, master planned community on a formerly-industrial site along Oakland’s waterfront. The site is approximately 64 acres of waterfront property off Embarcadero Road and 10th Ave.

When complete, the project will include up to 3,100 residential units (including the 465 affordable rental units), 200,000 square feet of commercial space, approximately 32 acres of parks and public open space, two renovated marinas (170 boat slips), and an existing wetlands restoration area. The master developer is Zarsion-OHP I, LLC (ZOHP) whose principal local partner is the Signature Development Group.

The City of Oakland acquired Parcels A and F from ZOHP for the purpose of developing the 465 affordable units of affordable housing. The Authority acquired a 50% share of Parcels A and F on October 19, 2017, for \$10 million. Four distinct projects are planned for these properties. Projects 1, 2 and 3 are described in detail below. Project 4 is expected to break ground in the second quarter of 2022.



BROOKLYN BASIN ILLUSTRATIVE PLAN

Brooklyn Basin, Project 3 Partnership with MidPen Housing Corp.



*Project 3 (named **Foon Lok West**) on Parcel A will include 130 units for very low-income families and formerly homeless persons.*

Photo: Main entrance to Foon Lok West with newly installed public art bike racks designed by Civic Design Studio.

Project Description:

<i>Project Address:</i> 311 9 th Avenue	<i>Affordability Targeting:</i> 20-60%
<i>Project Type:</i> New Construction	<i>Other Uses:</i> None
<i>Number of Units:</i> 130	<i>Architect:</i> HKIT Architects
<i>PBVs:</i> 65	<i>General Contractor:</i> Nibbi Brothers
<i>Target Population:</i> Very low-income families and formerly homeless individuals and couples	<i>Property Management:</i> MidPen
	<i>Total Development Cost:</i> \$102.3M

Permanent Funding Sources:

• OHA Acquisition Funds (included in City loan)	• Alameda County A1 Funds	\$9,698,000
• SF Federal Home Loan Bank AHP \$1,290,000	• Tax Credits – Wells Fargo	\$50,907,000
• CA HCD – No Place Like Home \$5,500,000	• General Partner Equity	\$110,000
• City of Oakland \$12,442,000	• Permanent Mortgage – CA Community Reinvestment Corporation	\$19,970,000

OHA Board Authorizing Resolutions:

- No. 4765, 8/28/17: CEQA
- No. 4766, 8/28/17: Purchase and Sale Agreement; Joint Ownership Agmt.; Master Housing Agmt.
- No. 4792, 2/26/18: Lease Disposition and Development Agreement for Projects 1 and 2; 258 PBVs
- No. 4868, 5/13/19: Lease Disposition and Development Agreement for Projects 3 and 4

Affiliate Board Authorizing Resolutions – Not applicable

Approved OHA/Affiliate Funding:

MTW: \$10,000,000 Land Acquisition

Disbursements to Date:

\$10,000,000

Current Project Status:

The Temporary Certificate of Occupancy was issued on 5/9/22. As of August 17th, the project is 100% leased and MidPen successfully converted all financing to permanent on March 24, 2023.

Construction Progress:

% Complete:	100.00%
% Complete last Month:	100.00%
Start Date	7/30/20
Scheduled Completion Date	4/30/22
Actual Completion Date:	5/9/22

New Hires:

Number of New Hires:	316
Number of Section 3 Hires:	35
% Section 3:	11.08%
% Local Residents:	43.99%
% Local Apprentices:	48.18%

Milestones Completed Past Month:

TCO received on 5/9/22 and the final permit card sign off was received on 7/6/22. MidPen received the Final Certificate of Occupancy on 12/8/22. MidPen successfully converted all construction financing to permanent and closed on the CA HCD No Place Like Home funding on March 24, 2023. The LIHTC Placed in Service and 8609 approvals are pending.

If 100% construction completion has been achieved, was the project delivered On Time? Was the project delivered Within Budget? If not, please explain.

Project was completed within the approved contract completion date but nine (9) days later than the original schedule. As of 8/1/22, project is within budget.

Brooklyn Basin, Project 4 Partnership with MidPen Housing Corp.



*Project 4 (named **Foon Lok East**) on Parcel A will include 124 units for very low-income families and formerly homeless persons.*

Photo: Foon Lok East, taken 6/1/23

The completed Foon Lok West on the right of the photograph; the Embarcadero and 880 Freeway are on the left.

Project Description:

Project Address: 389 9 th Avenue	Affordability Targeting: 20-60%
Project Type: New Construction	Other Uses: None
Number of Units: 124	Architect: HKIT Architects
PBVs: 61	General Contractor: Nibbi Brothers
Target Population: Very low-income families, formerly homeless individuals and couples	Property Management: MidPen
	Total Development Cost: \$109.7M

Permanent Funding Sources:

- OHA Acquisition Funds (included in City loan
- City of Oakland
- CA HCD – No Place Like Home (homeless funding)
- CA HCD – California Housing Accelerator Program
- General Partner Equity
- Permanent Mortgage – Century Housing

OHA Board Authorizing Resolutions:

- No. 4765, 8/28/17: CEQA
- No. 4766, 8/28/17: Purchase and Sale Agreement; Joint Ownership Agmt.; Master Housing Agmt.
- No. 4792, 2/26/18: Lease Disposition and Development Agreement for Projects 1 and 2; 258 PBVs
- No. 4868, 5/13/19: Lease Disposition and Development Agreement for Projects 3 and 4

Affiliate Board Authorizing Resolutions – Not applicable

Approved OHA/Affiliate Funding:

MTW: \$10,000,000 Land Acquisition

Disbursements to Date:

\$10,000,000

Current Project Status:

Elevator installation work on track for an October 11th inspection; exterior stucco and Nichiha siding installation on Embarcadero nearing completion; exterior work on 8th Avenue to begin next week; interior FFE installation throughout is on schedule; solar PV panels 100% installed, connections to inverters continues; project on schedule to achieve substantial completion by 2/12/24; marketing plan under review by City, County and OHA; applicant outreach and marketing to begin first week of October.

Construction Progress:

% Complete:	77.07%
% Complete last Month:	68.88%
Start Date:	6/6/22
Projected Completion Date:	February 2024
Actual Completion Date:	TBD

New Hires:

Number of New Hires:	192
Number of Section 3 Hires:	44
% Section 3:	22.92%
% Local Residents:	27.60%
% Local Apprentices:	40.32%

Milestones Completed Past Month: Closed all construction financing on 5/27/22. Contractor mobilized and started site work on 6/6/22.

If 100% construction completion has been achieved, was the project delivered On Time? Was the project delivered Within Budget? If not, please explain.

Project is still under construction.

285 12th Street – Partnership with EBALDC



Construction of a new 65-unit affordable housing building on a former parking lot at 12th and Harrison Street Downtown Oakland.

Project Description:

<i>Project Address:</i>	285 12 th Street	<i>Affordability Targeting:</i>	20%-70% AMI
<i>Project Type:</i>	New Construction	<i>Other Uses:</i>	3,500 sq. ft. commercial
<i>Number of Units:</i>	65	<i>Architect:</i>	David Baker Architects
<i>PBVs:</i>	16 PBVs, 8 HUD-VASH PBVs	<i>General Contractor:</i>	Roberts-Obayashi Corp.
<i>Target Population:</i>	Low-income families, 7 special needs units	<i>Property Management:</i>	EBALDC
		<i>Total Development Cost:</i>	\$69.3M
		<i>Placed in Service Date:</i>	

Targeted Permanent Funding Sources:

- | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Tax Credit Investor Equity • Permanent Hard Loan • OHA Land Purchase • General Partner Equity • Deferred Developer Fee | <p><i>Soft Loans & Grants</i></p> <ul style="list-style-type: none"> • OHA Loan • Multifamily Housing Program (MHP) • Infill Infrastructure Grant (IIG) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

OHA Board Authorizing Resolutions:

- Reso. No. 4881, 9/22/19: Land purchase and soft loan in combined amount not to exceed \$12,000,000. Conditionally awarded 16 Project-Based Section 8 Vouchers.
- Reso. No. 4992, 8/23/21: Acquisition bridge loan not to exceed \$7,265,880.
- Reso. No. 5089, 6/27/22: Conditional award of 8 HUD-VASH Project-Based Vouchers.

Affiliate Board Authorizing Resolutions – Not applicable.

Approved OHA/Affiliate Funding:

MTW: \$12,000,000 for land purchase and loan

Disbursements to Date:

\$7,091,979

Current Project Status:

Predevelopment – EBALDC is continuing architecture and engineering design, refining construction cost estimates, and applying for funding. EBALDC applied for MHP and IIG funding in the 2023 HCD Super NOFA. EBALDC is evaluating options for value engineering in an effort to reduce the project's financing gaps and improve the cost containment components of the Super NOFA and CDLAC tax exempt bond tiebreaker scores. If the Super NOFA application is successful, the project would apply to CDLAC for bonds and 4% credits in early 2024 and, if the CDLAC application is successful, begin construction in late 2024.

Milestones Completed Past Month:

Received Catalytic Qualifying Infrastructure Area Infill Infrastructure Grant (IIG) award.

If 100% construction completion has been achieved, was the project delivered on time? Was the project delivered on budget? If not, please explain: Project is in predevelopment phase.

500 Lake Park – Partnership with EAH



OHA is partnering with EAH on the development of a 53-unit affordable housing building on the former site of the Kwik-Way Drive-In, in the Grand Lake Neighborhood of Oakland.

Project Description:

Project Address: 500 Lake Park
Project Type: New Construction
Number of Units: 53
PBVs: 18 VASH Vouchers
Target Population: Low-income families; 20 units for homeless or at-risk veterans

Affordability Targeting: 20%-60% AMI
Other Uses: 2,900 sq. ft. commercial
Architect: Lowney Architecture
General Contractor: JH Fitzmaurice
Property Management: EAH
Total Development Cost: \$75.2 M
Placed in Service Date:

Targeted Permanent Funding Sources:

- | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Tax Credit Investor Equity • Permanent Hard Loan • OHA Land Purchase • General Partner Equity • Deferred Developer Fee | <p><i>Soft Loans & Grants</i></p> <ul style="list-style-type: none"> • OHA Loan • Calif. HCD Veterans Housing & Homelessness Prevention Program (VHHP) • Calif. HCD Multifamily Housing Program (MHP) • Calif. HCD Infill Infrastructure Grant (IIG) • City of Oakland |
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OHA Board Authorizing Resolutions:

- Reso. No. 4900, 2/3/20: Land purchase and soft loan in combined amount not to exceed \$7,500,000. Conditionally awarded 14 HUD-VASH Project-Based Vouchers.
- Reso. No. 5088, 6/27/22: Conditional award of 4 additional HUD-VASH Project-Based Vouchers.

Affiliate Board Authorizing Resolutions – Not applicable.

Approved OHA/Affiliate Funding:

MTW: \$7,500,000 for land purchase and loan

Disbursements to Date:

\$6,973,435.83

Current Project Status: Predevelopment – EAH is continuing architecture and engineering design, refining construction cost estimates, and applying for funding. EHA applied for MHP again in the 2023 Super NOFA. If the Super NOFA application is successful, the project would apply to CDLAC for bonds and 4% credits in early 2024 and, if the CDLAC application is successful, begin construction in late 2024.

Milestones Completed Past Month:

Resubmitted plans to City Plan Check.

If 100% construction completion has been achieved, was the project delivered on time? Was the project delivered on budget? If not, please explain: Project is in predevelopment phase.

The Phoenix – Partnership with EBALDC & Allied Housing



Construction of a 101 modular unit affordable housing project in the Prescott neighborhood of West Oakland.

The project developer is a joint venture between East Bay Asian Local Development Corporation (EBALDC) and Allied Housing.

Project Description:

<p><i>Project Address:</i> 801 Pine Street <i>Project Type:</i> New Construction (Modular) <i>Number of Units:</i> 101 <i>PBVs:</i> 0 <i>Target Population:</i> Low-income individuals and families with 49 units set-aside for chronically homeless.</p>	<p><i>Affordability Targeting:</i> 30%-50% AMI <i>Architect:</i> Lowney Architects <i>Contractor:</i> Factory OS / Bernards <i>Property Management:</i> EBALDC <i>Total Development Cost:</i> \$58.1M <i>Placed In Service:</i> TBD</p>
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Targeted Permanent Funding Sources:

- City of Oakland (Perm Loan)
- City of Oakland (Acquisition Loan)
- CA HCD Housing for Healthy California (HHC)
- CA HCD Housing Accelerator
- HHC Capitalized Operating Subsidy
- OHA Rental Assistance Subsidy (RAS)

OHA Board Authorizing Resolutions:

- Reso. No. 5127, 12/12/22: Conditional award of MTW reserves to fund a Rental Assistance Subsidy in an amount up to \$3,112,566.

Affiliate Board Authorizing Resolutions – Not applicable.

Approved OHA/Affiliate Funding:

MTW: \$3,112,566 – RAS

Disbursements to Date:

\$0

Current Project Status:

Demolition of existing site concrete and asphalt is complete; soil remediation has begun; the inspections of modular units (already built and in storage at Factor OS facility) is underway.

Milestones Completed Past Month: Closed construction financing on 8/1/23

If 100% construction completion has been achieved, was the project delivered on time? Was the project delivered on budget? If not, please explain: Project is under construction.

Friendship Senior Housing – Partnership with CHDC



Friendship Senior is a 50-unit new construction affordable housing project consisting of studio and one-bedroom units serving senior households in West Oakland. The project developer is the Community Housing Development Corporation of North Richmond (CHDC).

Project Description:

<p>Project Address: 1904 Adeline Street Project Type: New Construction Number of Units: 50 (one manager's unit) PBVs: 0 Target Population: Senior households aged 62 or older with set-asides for homeless seniors with mental illness.</p>	<p>Affordability Targeting: 40% AMI or below Architect: HKIT Architects General Contractor: BBI Construction Property Management: John Stewart Company Total Development Cost: \$52.6M Placed in Service Date: TBD</p>
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Targeted Permanent Funding Sources:

- Tax Credit Equity
- CA HCD No Place Like Home (NPLH)
- CA HCD Multifamily Housing Program (MHP)
- OHA Loan
- Section 8 Project-Based Vouchers
- Department of Toxic Substances Control
- CA HCD Housing Accelerator
- Ground Lessor Note

OHA Board Authorizing Resolutions:

- Reso. No. 4859, 4/29/19: Conditional award of 34 Project Based Vouchers (PBVs)
- Reso No. 5157, 4/3/23: Conditional award of \$2,100,000

Affiliate Board Authorizing Resolutions – Not applicable.

Approved OHA/Affiliate Funding:

34 PBVs
 OHA Loan: \$2,100,000

Disbursements to Date:

\$0

Current Project Status:

Project closed escrow on all construction sources and the tax-exempt bonds were issued on September 7th. Construction is expected to begin the week of 9/11/23.

Milestones Completed Past Month: Construction Closing on 9/7/23.

If 100% construction completion has been achieved, was the project delivered on time? Was the project delivered on budget? If not, please explain: Project is in construction.

Coliseum Way – Partnership with Danco



Rehabilitation of a former motel site to 36 units of permanent supportive housing for chronically homeless households in East Oakland.

The project developer is Danco Communities.

Project Description:

<p><i>Project Address:</i> 4801 Coliseum Way <i>Project Type:</i> Acquisition and Rehabilitation <i>Number of Units:</i> 37 (one manager's unit) <i>PBVs:</i> 0 <i>Target Population:</i> Low-income individuals who experiencing homelessness or at risk of homelessness.</p>	<p><i>Affordability Targeting:</i> 30% AMI or below <i>Architect:</i> DG Group <i>General Contractor:</i> Danco Builders Northwest <i>Property Management:</i> Danco Property Management <i>Total Development Cost:</i> \$26.6M <i>Placed in Service Date:</i> TBD</p>
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Targeted Permanent Funding Sources:

- Project HomeKey funds
- City of Oakland
- OHA Rental Assistance Subsidy (RAS)

OHA Board Authorizing Resolutions:

- Reso. No. 5028, 1/24/22: Conditional award of MTW reserves to fund a Rental Assistance Subsidy in an amount up to \$4,572,041.

Affiliate Board Authorizing Resolutions – Not applicable.

Approved OHA/Affiliate Funding:

MTW: \$4,572,041 – RAS

Disbursements to Date:

\$0

Current Project Status:

Predevelopment: Projected construction start by 9/1/23.

Milestones Completed Past Month:

If 100% construction completion has been achieved, was the project delivered on time? Was the project delivered on budget? If not, please explain: Project is construction phase.

Asset Management Department – July 2023

Occupancy Report - Contract Managed Public Housing Units

Development	Total Units	Exempt or Non-Dwelling Employee Unit	Offline Planned Rehab	Offline Casualty Loss	Max Available Units	Vacant	Vacant Pre-leased	Total Occupied	Previous Month Occupancy Rate	Current Month Occupancy Rate
Harrison Tower	101	0	1	46	0	54	0	54	100.00%	100.00%
Adel Court	30	0	0	0	0	30	1	28	93.33%	93.33%
Campbell Village	154	1	1	0	1	151	1	147	96.05%	97.35%
Palo Vista Gardens	100	0	0	0	0	100	4	96	96.00%	96.00%
Linden Court	38	0	0	0	0	38	2	36	94.74%	94.74%
Mandela Gateway	46	0	0	0	0	46	3	43	93.48%	93.48%
Chestnut Court	45	0	0	0	0	45	4	41	91.11%	91.11%
Foothill Family	21	0	0	0	1	20	0	19	95.00%	95.00%
Lion Creek I & II	99	0	0	0	0	99	2	97	97.98%	97.98%
Lion Creek III	37	0	0	0	0	37	0	37	100.00%	100.00%
Lion Creek IV	21	0	0	0	0	21	0	21	100.00%	100.00%
Total	692	1	2	46	2	641	17	619	96.15%	96.27%

Recertification Report - Contract Managed Public Housing Units

Development	Completed Annual Recertifications	Outstanding Recertifications	Household/ Legal Recertifications	Total Backlog Certifications
Harrison Tower*	0	0	0	0
Adel Court	0	0	0	0
Campbell Village	9	1	0	1
Palo Vista Gardens**	0	0	0	0
Linden Court	0	0	0	0
Mandela Gateway	0	0	0	0
Chestnut Court	0	0	0	0
Lion Creek Crossings	2	1	0	0
Foothill Family***	0	0	0	0
Total	11	2	0	1

*Harrison Towers and Adel Court are on the tri-annual recertification schedule.

**Palo Vista Gardens conducts re-certifications in October.

***Foothill Family conducts annual re-certifications in August.

TARs - Contract Managed Public Housing Units

Development	Current Charged	Current Collected	Current Uncollected	Current TAR	1- 30 Days	31- 60 Days	61+ Days	Total AR Balance
Harrison Tower	\$23,317	\$21,522	\$1,795	-7.70%	(\$2,395)	-	-	(\$600)
Adel Court	\$11,154	\$10,362	\$792	7.10%	\$89	\$621	\$12,108	\$13,610
Campbell Village	\$58,710	\$28,558	\$30,152	51.36%	(\$1,315)	\$18,074	\$76,444	\$123,355
Palo Vista Gardens	\$33,738	\$32,810	\$928	2.75%	\$1,881	\$1,877	\$8,200	\$12,886
TOTAL	\$126,919	\$93,252	\$33,667	13.38%	(\$1,740)	\$5,143	\$24,188	\$37,313

Work Order Report - Contract Managed Public Housing Units

Development Name	Total Units	WO Opened at Beginning of Month	WO Opened Within Date Range	WO Closed Within Date Range	Work Orders Remaining Open
Harrison Tower	101	0	10	10	0
Adel Court	30	0	3	0	3
Campbell Village	154	1	20	21	0
Palo Vista Gardens	100	0	18	0	18
Linden Court	45	0	6	2	4
Mandela Gateway	46	2	8	10	0
Chestnut Court	38	9	5	14	0
Lion Creek Crossings	157	8	104	98	14
Foothill Family	21	0	3	0	3
Total	692	37	251	218	70

Senior Site Activities

Outreach Efforts/Social Activities	Harrison Tower	Adel Court	Palo Vista Gardens	Total	Notes
Wellness Phone Calls	120	40	60	220	Calls made to senior residents
Mercy Brown Bags	130	14	29	173	Food bags were distributed two (2) times in July, and included produce, canned goods, milk, eggs, and tilapia
Case Management	4	N/A	N/A	4	On-on-one meetings were held to discuss services needed
Home Management	3	N/A	N/A	3	Home visits to follow up on services needed
Benefits/Insurance Language Support	38	N/A	N/A	38	Translation assistance with forms related to medical care, bank statements, social security, medical appointment, and relocation forms
Birthday Cards	2	0	9	11	Cards and goodie bags were provided
Birthday Celebration	2	0	19	21	Birthday cake and food were provided in community centers
Fun Fridays/Card Games	34	N/A	N/A	34	Residents came together on four occasions to play card games and Mahjong
BINGO	6	N/A	N/A	6	Seniors enjoyed playing BINGO
iPad Learning Class	6	N/A	N/A	6	Seniors received instruction from Service Coordinator on how to use an iPad
ESL Classes	6	N/A	N/A	6	English as a Second language class was provided
Arts & Craft	8	N/A	N/A	8	Seniors colored artwork to assist in the decorating of the Harrison Towers community room
Summer Theme Decorations	7	N/A	N/A	7	Seven (7) seniors at Harrison Towers decorated the community room and common areas with summer theme decorations
USOAC Walk Club	N/A	N/A	18	18	Three (3) walk sessions organized this month
Mobile Technology Training for Emergency Preparedness	31	6	N/A	37	Training provided by Eden I & R, included phone applications to have on smartphone to provide alerts during an emergency
Bagua Meditation Presentation	14	N/A	N/A	14	Bagua Meditation Presentation at Harrison Towers, to assist in staying healthy
July Fieldtrip/Outing	N/A	2	18	20	Adel Court and Palo Vista Seniors attended the Fremont Mall and had lunch at Red Lobster
UC Master Gardner-Garden Meeting	N/A	N/A	9	9	Master Garden meeting, with UC Master Gardeners of Alameda County to discuss PVG garden plan and needs from seniors
Internet Speet Test Program	2	N/A	N/A	2	In July, two (2) families at Harrison Towers participated in the test for four weeks and as an incentive, received a total of \$200 in Target gift cards
Resident Advisory Committee Meeting	N/A	N/A	6	6	Seniors use the platform to stay informed of upcoming events, and to voice concerns

Health and Wellness Highlights

- **Health & Wellness Event:** On July 21, Adel Court hosted their first Summer Health & Wellness Resource Fair. The event featured health resources, music, healthy food (sandwiches, salad, fruits, and veggies), and provided an opportunity to socialize with neighbors. Alameda County Community Food Bank-CalFresh, Hong Fook Center, California Telephone Access Program, and Alameda County Social Services Agency participated in the event and shared their information with the residents and community. The Hong Fook Center staff assisted with interpretation.

Twenty (20) residents attended the event and attendees were thrilled to have such a great event to learn about resources available to them. All who attended received flyers and swag, and many expressed that they would like for it to be a recurring event.





Social Activities Highlights

- 4th of July Celebration:** Adel Court and Palo Vista Gardens residents celebrated 4th of July by having BBQ and socializing with their neighbors. The BBQ was catered by Emil Villas, and included tri tip steak, BBQ chicken, baked beans, sweet corn bread and a side salad. A total of thirty-six (36) residents attended the celebration, six (6) from Adel Court and thirty (30) from Palo Vista Gardens.

Training and Workshop Highlights

- Mobile Technology for Emergency Preparedness Training:** An instructor from Eden I & R provided a one-and-a-half-hour training on “Mobile Technology for Emergency Preparedness Training” to residents at Harrison Tower and Adel Court. The instructor provided useful safety tips, preventative measures, and precautions on using mobile technology, which residents can use to help ensure their personal safety. Thirty-one (31) residents from Harrison Tower attended the training on July 12, and six (6) residents from Adel Court attended on July 19. Lunch and snacks were provided to all seniors who attended the training.
- Senior Services Connect Workshops:** St. Mary’s Center provided a two-part “Seniors Services Connect” workshop at Palo Vista Gardens. The workshop was led by seniors from St. Mary’s Center who had assisted in creating a Senior Resource Guide, launched in March 2023. Palo Vista Gardens seniors were able

to review the guide in full detail and provide feedback regarding the resources. The first workshop was held on July 12, with thirteen (13) participants and the second one was held on July 17 with ten (10) participants. Cantonese and Vietnamese, interpreters were onsite and also assisted attendees with filling out forms. The attendees entered into a raffle, with three (3) seniors winning \$25 gift card each. Also raffled, was a refurbished Windows Desktop Computer.

Roundtable Discussion Highlights

- **Partner Roundtable Discussion:** On July 18th, OHA's Asset Management team held the monthly Partner Roundtable Discussion with seventeen (17) attendees from the John Stewart Company, Acta Non Verba, Project Access, Asian Health Services, East Bay Asian Local Development Corporation, and Satellite Affordable Housing Associates. The roundtable meetings allow all partners to provide site updates, share resources, and provide information regarding their upcoming events. July meeting agenda focused on staff sharing their National Night Out plans at their respective sites for August 1, 2023.

iPad Class (Harrison Tower)



Fun Fridays (Harrison Tower)



ESL English Classes (Harrison Tower)



Arts & Crafts (Harrison Tower)



Decorating Community Room (Harrison Tower)



BINGO (Harrison Tower)



Mobile Technology for Emergency Preparedness Training (Harrison Tower)



Bagua Meditation Presentation (Harrison Tower)





Campbell Village Community Center

Outreach Efforts/Activities	Total	Notes
Resident Phone Auto Dialer/One Call	154	All HOH were reached out seventeen (17) times with information about events, workshops, and trainings through robocall
Wellness Checks (Live Phone calls)	28	Calls made to make sure residents are doing well and they were also asked if any services or referrals needed at the present time
Community Room Walk-ins	19	Residents stopped by the community room to pick up flyers of upcoming events
Document Printout/Copies	20	Fifteen (15) residents needed assistance in printing documents and/or support with their PG&E login, and five (5) needed help with Spectrum online documents
Computer Class	5	Three (3) classes were held this month
Computer Open Lab	46	The computer lab was used by residents for various purposes
Phone/Tablet Assistance	2	Assistance included setting up residents' tablets for internet access and downloading games
Volunteers	3	Three (3) volunteers supported three (3) events: backpack distribution, Kids Summer Program, and putting together the Aging in Place kits
Art Class	11	Four (4) art classes were held with eleven (11) kids participating in the following activities: coloring books, tie dye shirts and painting Jenga blocks
Summer Splendor for Seniors Tickets	20	Twenty (20) tickets were sold for the upcoming 40 th Summer Splendor scheduled for August 17
Meditation Mondays Class	3	Three (3) meditation workshops were held in July
Backpack Giveaway	30	Back to school support was provided to thirty (30) CV kids, who each received a backpack filled with school supplies
Summer Meal Program for kids	169	City of Oakland provided free summer meals. Eighteen (18) kids received a total of 169 meals in July
Summer Program for kids	18	Summer program activities for eighteen (18) kids

July Highlights

- **Campbell Village Summer Program for kids:** The summer school program commenced on June 20 and was available Monday through Friday from 11am to 3pm. The program provides kids activities, including: reading time, arts and crafts, BINGO, movie days, hopscotch, basketball, musical chairs, and many other fun activities. Eighteen (18) kids participated in the summer program in July. Kids also received a nutritious meal and snacks provided by Oakland's Summer Food Service Program.
- **Backpack Giveaway:** On July 31, Campbell Village management staff hosted a Backpack Giveaway, where backpacks filled with school supplies were provided to school-aged children. Thirty (30) Campbell Village kids were excited to start the new school year with cool backpacks and school supplies. Kids were able to choose backpacks in the color of their choice. Many of the kids expressed gratitude for the backpacks given to them.

Kids Summer Program



Backpack Giveaway





NATIONAL CONFERENCE



EHV Celebration



THE OAKLANDSIDE

West Oakland's 7th Street was once a Black cultural hub. A new plan aims to restore it

A newly released report from 7th Street Thrives outlines plans to revive what used to be known as the "Harlem of the West."





Oakland Housing Authority Police Department Communications Unit Receives CA POST Recognition