



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT  
WASHINGTON, DC 20410-5000

OFFICE OF PUBLIC AND INDIAN HOUSING

August 16, 2024

Patricia Wells  
Executive Director  
Oakland Housing Authority  
1619 Harrison Street  
Oakland, CA 94612

Subject: Oakland Housing Authority FY 2025 Annual MTW Plan Approval

Dear Ms. Wells:

The Department of Housing and Urban Development (HUD) has reviewed the Oakland Housing Authority's (OHA) FY 2025 Annual Moving to Work (MTW) Plan, which was submitted on April 10, 2024, and resubmitted per HUD's comments on August 1, 2024. I am writing to inform you that the Plan, as submitted on August 1, 2024, is approved.

The Department's approval of this Annual MTW Plan is limited to approval of policies and actions authorized by the 1937 Act and flexibilities waiving provisions of the 1937 Act authorized by the MTW Agreement, including local, non-traditional activities in compliance with Notice PIH 2011-45. In providing assistance to families under programs covered by this Plan, OHA must comply with the rules, standards, and policies established in the Plan as well as all applicable federal requirements other than those provisions of the 1937 Act waived by the MTW Agreement. Documents relying upon the approved Plan (i.e., Administrative Plan, Admission and Continued Occupancy Policy, etc.) should be updated to reflect those policies. Also, the approved Plan and all required attachments and documents should be available for review and inspection at OHA's principal office during normal business hours.

Thank you for your continued efforts to implement an effective and meaningful MTW program. Please contact Kai Jennings at [kai.a.jennings@hud.gov](mailto:kai.a.jennings@hud.gov) if you have any questions.

Sincerely,

A handwritten signature in blue ink that reads "John M. Concannon".

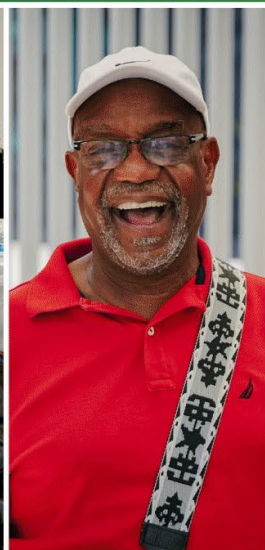
John M. Concannon  
MTW Program Director  
Office of Public Housing Investments

cc: Gerard Windt, San Francisco Regional Office  
Sapna Talati, San Francisco Regional Office

# MAKING TRANSITIONS WORK ANNUAL PLAN



**COMMITMENT TO QUALITY HOUSING FROM THE GROUND UP**



**FISCAL YEAR 2025 // JULY 1, 2024 - JUNE 30, 2025**





# **Fiscal Year 2025 MTW Annual Plan**

Board of Commissioners  
Anne E. Griffith, Chair  
Gregory D. Hartwig, Vice Chair  
Janny Castillo  
Lynette Jung Lee  
Barbara Montgomery  
Mark J. Tortorich  
William Mayes

Patricia Wells, Executive Director

Senior Staff:  
Tom Deloye, Chief Officer of Real Estate Development  
Michelle Hasan, Chief Housing Operations Officer  
Dominica Henderson, Chief Social Impact Officer  
Duane Hopkins, Chief Officer of Program and Finance Administration  
Bruce Brackett, Director, Capital Improvements  
Drew Felder, Senior Director of Human Resources  
Anna Kaydanovskaya, Director, Asset Management  
Alan Love, Director, Police Services  
Victor Madamba, Director of Finance  
Mark Schiferl, Director, Property Management  
Nicole Thompson, Director, Family and Community Partnerships  
Brandon White, Director, Information Technology

Prepared by:  
Melissa Benik and Krinzia Lopez

With contributions from Deni Adaniya, Jonathan Adler, Caroline Barnett, Teela Carpenter, Joetta Farrow, Ahmed Karimi, Anders Lee, Mark Mislant, Erika McLitus, Dawn Pipkins, and Jonathan Young

1619 Harrison Street  
Oakland, CA 94612  
(510) 874-1500  
[www.oakha.org](http://www.oakha.org)



# Housing Authority of the City of Oakland, California

## Fiscal Year 2025 MTW Annual Plan

### Table of Contents

<u>Section I. Introduction</u>	<u>7</u>
<u>Section II. General Housing Authority Operating Information</u>	<u>18</u>
<u>Table 1: Planned New Public Housing Units to be Added</u>	<u>18</u>
<u>Table 2: Planned Public Housing Units to be Removed</u>	<u>20</u>
<u>Table 3: Planned New Project-Based Vouchers</u>	<u>22</u>
<u>Table 4: Planned Existing Project-Based Vouchers</u>	<u>24</u>
<u>Table 5: Other Changes to the Housing Stock Anticipated</u>	<u>35</u>
<u>Table 6: General Description of All Planned Capital Fund Expenditures</u>	<u>37</u>
<u>Table 7: Planned Number of Households Served</u>	<u>39</u>
<u>Table 8: Detail on Local Non-Traditional Households Served</u>	<u>40</u>
<u>Table 9: Description of any Anticipated Issues Related to Leasing</u>	<u>43</u>
<u>Table 10: Waitlist Information Projected for Beginning of Fiscal Year</u>	<u>45</u>
<u>Table 11: Planned Changes to the Waiting List in the Planned Year</u>	<u>46</u>
<u>Section III. New Proposed MTW Activities</u>	<u>48</u>
<u>Section IV. Approved MTW Activities: HUD Approval Previously Granted</u>	<u>53</u>
<u>Table 12: Approved MTW Activities: HUD Approval Previously Granted</u>	<u>53</u>
<u>Table 13: Implemented Activities</u>	<u>59</u>
<u>Activity #17-01 Owner Incentives Program</u>	<u>67</u>
<u>Activity #15-01 Local Area Portability Reform</u>	<u>70</u>
<u>Activity #15-02 Modified Utility Allowance Policy</u>	<u>73</u>
<u>Activity #14-01 Alternative Recertification Schedules</u>	<u>75</u>
<u>Activity #12-01 Eliminate Caps on PBV Allocations</u>	<u>79</u>
<u>Activity #11-01 PBV Occupancy Standards</u>	<u>82</u>
<u>Activity #11-02 Standardize Transfer Policy</u>	<u>84</u>
<u>Activity #11-03 SRO/Studio Apartment Preservation Program</u>	<u>86</u>
<u>Activity #11-05 Transitional Housing Programs</u>	<u>90</u>
<u>Activity #10-01 Specialized Housing Programs</u>	<u>100</u>
<u>Activity #10-02 Program Extension for Households Receiving Zero HAP</u>	<u>101</u>

Activity #10-03 Combined PBV HAP Contract for Multiple Non-contiguous Sites	103
Activity #10-04 Alternative Initial Rent Determination for PBV Units	104
Activity #10-05 Acceptance of Lower HAP in PBV Units	105
Activity #10-06 Local Housing Assistance Program	107
Activity #10-08 Redesign FSS Program	116
Activity #10-09 Altered Minimum Stay Required in PBVs	122
Activity #08-01 Fund Affordable Housing Development Activities	124
Activity #06-01 Site Based Wait Lists	129
Activity #06-02: Allocation of PBV Units: Without Competitive Process	131
Activity #06-03 Allocation of PBV Units: Using Existing Competitive Process	132
Approved MTW Activities Not Yet Implemented	133
Table 14: Activities on Hold	134
Activity #20-01 Emergency Rent Relief from Interim Re-Certifications	135
Activity #17-02 Automatic Rent Increase for HCV	138
Activity #13-01 Rent Reform Pilot Program	139
Activity #10-07 Disposition and Relocation Counseling Services	140
Activity #09-02 Short-Term Subsidy Program	140
Closed Out Activities	141
Section V. Sources and Uses of Funding	142
Table 15: Estimated Sources of MTW Funding	142
Table 16: Estimated Uses of MTW Funding	143
Table 17: Planned Use of MTW Single Fund Flexibility	159
Table 18: Planned Application of Unspent Operating Fund and HCV Funding	166
Table 20: Local Asset Management Plan	167
Section VI. Administrative	169
List of Appendices	178
Appendix A. Glossary of Acronyms	180
Appendix B. OHA's Planned FY 2024 Capital Fund Expenditures	185
Appendix C. Approved Project-Based Voucher Allocations	188
Appendix D. OHA Housing Inventory	195
Appendix E. Comments Received During Public Comment Period	184
Appendix F. Evidence of a Public Process	199
Appendix G. Alameda County Income Limits and Fair Market Rents	206
Appendix H. Flat Rent Public Housing Policy	208
Appendix I. Voucher Payment Standards	210
Appendix J. Standard HUD Forms Modified for MTW Activities	212
Appendix K. Rental Assistance Demonstration Significant Amendment	235

Language translation and American Sign Language interpretation services are available in 151 languages at all offices for free for all members of the public.

To request interpretation/translation services call (510) 587-2100, TDD Number (510) 597-7119.

En todas las oficinas hay servicios gratuitos de interpretación a la lengua de señas estadounidense y traducción a 151 idiomas para todos los ciudadanos.

Para solicitar servicios de interpretación/traducción llame al (510) 587-2100, número TDD (510) 597-7119.

我們的所有辦公室均提供 151 種語言翻譯和美國手語傳譯服務，免費供公眾享用。

如要索取傳譯/筆譯服務，請致電 (510) 587-2100, TDD 號碼 (510) 597-7119。

所有办事处免费向所有公众提供 151 种语言的翻译和美国手语翻译服务。

如需申请口译/笔译服务，请致电 (510) 587-2100, TDD 号码 (510) 597-7119。

Dịch vụ Dịch thuật Ngôn ngữ và Thông dịch Ngôn ngữ Ký hiệu Hoa Kỳ được cung cấp miễn phí bằng 151 ngôn ngữ tại tất cả các văn phòng cho tất cả công dân.

Để yêu cầu dịch vụ thông dịch/dịch thuật, hãy gọi (510) 587-2100, Số TDD (510) 597-7119.

## Section I. Introduction

### Message from the Executive Director



As we strategically plan for Fiscal Year (FY) 2025, we eagerly apply lessons learned from previous years, to elevate our performance and capacity to administer programs effectively and enhance services for our families. We will mobilize new projects to bolster our communities, reach more Oakland residents by opening a Housing Choice Voucher waitlist for the first time in over a decade, and provide crucial housing assistance to unhoused residents of Oakland.

Our commitment remains resolute in the pursuit of excellence at the Housing Authority of the City of Oakland, California (OHA), where we strive to ensure that our families not only receive housing opportunities but are immersed in service-enriched, holistic environments that prioritize the health and safety of each community member. Building on our achievements, we aspire to stably house as many families as possible, aligning with the City of Oakland's ambitious goal of creating over 26,000 new homes

by 2031 and the Biden-Harris administration's All In initiative to reduce homelessness by 25% by 2025. OHA has the capacity to reach almost 18,000 families with its housing assistance programs. To meet that target, we will lease a minimum of 97% of public housing units, maintain high utilization in all voucher programs, and stabilize housing for hundreds of local, non-traditional program families. Furthermore, we intend to achieve these goals with a laser focus on ensuring the long-term financial viability of OHA.

Collaborative efforts with our partners and City officials will evolve as we refine and innovate our approach, unwaveringly advocating for equitable housing solutions. Through robust alliances and partnerships with local anchors like the Alameda County Continuum of Care and the City of Oakland Department of Housing and Community Development, we adopt a holistic approach to care by hosting community-building events and providing safe living conditions with the support of the Oakland Housing Authority Police Department. In FY 2025, OHA will utilize MTW flexibility to support the East Oakland Works Jobs Plus grant awarded in FY 2023, to increase employment opportunities for east Oakland public housing residents.

Our employees remain dedicated to guiding each resident find the optimal pathway for individual success and long-term resiliency. Together, we can strengthen community bonds by uplifting, empowering and engaging families to help shape not only their future but the future of strong Oakland communities as we intentionally lead with inclusion and equity at the forefront. Special appreciation goes to the dedicated public servants comprising the staff and Board of Commissioner team, who tirelessly deliver essential services to the Oakland community. As we



look ahead to a productive year in FY 2025, I express sincere thanks for your continued collaboration with OHA.

## Introduction

The Oakland Housing Authority (OHA) was established in 1938 to assure the availability of quality housing for low-income persons. OHA operates federally funded and other housing assistance programs and reaching over 16,000 of Oakland's lowest-income families including the elderly and persons with disabilities. The mission of the OHA is:

*To assure the availability of quality housing for low-income persons and to promote the civic involvement and economic self-sufficiency of residents and to further the expansion of affordable housing within Oakland.*

## MTW Demonstration Program

The United States Department of Housing and Urban Development (HUD) selected OHA to participate in the Moving to Work (MTW) Demonstration program in 2001. OHA executed its first MTW agreement with HUD in March of 2004. Initially, a seven-year agreement was executed, which would have expired on June 30, 2011. However, OHA and HUD signed the Amended and Restated Moving to Work Agreement (Agreement), which extended OHA's participation in the MTW Demonstration through June 30, 2018. In December 2015, Congress authorized the extension of the MTW agreements of the 39 existing MTW agencies to terminate in year 2028. This extension allowed OHA to continue its localized housing programs and to continue to implement various innovations that remove barriers to housing for OHA families. Since September 2022, HUD admitted 87 agencies to the expansion of the MTW Demonstration Program. Currently, OHA is one of 126 public housing authority participants in the demonstration nationally.



The MTW Demonstration waives certain provisions, implementing requirements, and regulations of the Housing Act of 1937. In addition, using MTW waivers, OHA may combine funding from different HUD programs such as public housing operating subsidy, Capital Fund, and the Housing

Choice Voucher (HCV) program funds, into a Single Fund Budget with flexibility to use the funding as approved across programs. MTW offers a unique opportunity for housing authorities to explore and test new and innovative methods of delivering housing and supportive services to low-income residents. OHA may use MTW funds in the Single Fund Budget for approved eligible MTW activities including housing assistance, capital improvements, acquisition and new construction, and resident services. In addition, OHA's agreement allows the MTW funds to be used outside of the traditional public housing and HCV programs to support local housing activities. OHA renamed the MTW program *"Making Transitions Work"* in order to acknowledge the various ways

MTW can facilitate transitions for families across the phases of the housing spectrum and to better reflect the potential of the demonstration to positively impact the lives of Oaklanders.

The United States Congress established the following five statutory requirements and three statutory objectives when it approved the MTW Demonstration program:

Statutory Requirements	Statutory Objectives
<ul style="list-style-type: none"><li>• Assist substantially the same total number of eligible low-income families under MTW as would have been served absent the demonstration</li><li>• Maintain a mix of families (by family size) comparable to those they would have served without the demonstration</li><li>• Ensure that at least 75 percent of the families assisted are very low-income</li><li>• Establish a reasonable rent policy to encourage employment and self-sufficiency</li><li>• Assure that the housing the agencies provide meets HUD's housing quality standards</li></ul>	<ul style="list-style-type: none"><li>• Reduce costs and achieve greater cost effectiveness in Federal expenditures;</li><li>• 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</li><li>• Increase housing choices for low income families</li></ul>

In compliance with its MTW Agreement, OHA must meet each statutory requirement by implementing the activities discussed in this Annual Plan. OHA's plan for achieving each requirement is detailed in [Section II](#). Additionally, OHA must design and implement all approved MTW activities to meet at least one of the statutory objectives. Many of OHA's MTW initiatives meet more than one of the statutory objectives. The goals and various strategies OHA will use to serve the existing 35,000 program participants, and expand assistance to additional families in need, are discussed in [Section IV](#).

## Overview of the Agency's Short-Term and Long-Term Goals and Objectives

### Short-term Goals and Objectives



OHA remains committed in FY 2025 to working with Mayor Sheng Thao and the City Council to address the housing crisis and assist in achieving the mayor's goals including creating housing opportunities for all of Oakland's unhoused residents, providing on-demand mental health and drug treatment, creating innovative and flexible funding streams to build new affordable housing, and creating cost efficient housing alternatives by making public land available for real housing solutions. OHA

shares similar objectives in support of affordable housing creation and funding efforts and intends to form a collaborative partnership with Mayor Thao to re-house many homeless families through a combination of expanding additional programs designed to assist the homeless, leasing new voucher awards, completing affordable housing projects in the development pipeline and providing funding assistance to new projects submitted to OHA through various pipelines that otherwise would fall short of resources.

#### Priorities:

- ❖ Lease and maintain utilization of any special vouchers awarded to provide emergency housing relief
- ❖ Lease all public housing and PBV sites to at least 97%
- ❖ Complete at least 60-unit rehabilitations across all OHA-managed properties
- ❖ Improve reporting and transparency through effective dashboards based on real-time business system information
- ❖ Strengthen inter-agency partnerships to implement multistage (transitional and permanent) solutions to eliminate homelessness and expand permanent supportive housing efforts
- ❖ Stabilize supportive service delivery by focusing on four core areas and scaling based on capacity

### Long-term Goals and Objectives

OHA will remain nimble and expand participation with Oakland entities and elected officials to quickly respond to unexpected situations, participate and inform the local legislative process while monitoring state and national legislation, and advocate strategically to achieve overall agency priorities and goals. To remain in compliance with HUD regulations, OHA will implement Sections 102 and 104 of the Housing Opportunity Through Modernization Act of 2016 (HOTMA) during the FY. OHA will be updating the Administrative Plan and the Admissions and Continued Occupancy Policy (ACOP) to incorporate all necessary changes regarding income reviews and asset limits



and will use MTW flexibility to address asset limitations in “Activity #25-01, Asset Limit Modifications.”

The activities described in the Annual Plan build on OHA’s legacy and experience through innovation and serve as tools to support and implement the long-term strategic goals, which were approved by the Board of Commissioners in 2021. The long-term goals are:

*Sustained high standards of customer service for residents and stakeholders*

According to the January 2023 Point-in-Time Count (PIT), an annual snapshot of the number of individuals in shelters, temporary housing, and in unsheltered settings, there was a

**POINT-IN-TIME COUNT**

12% increase in people experiencing homelessness from 2022. At a national level, the PIT report found more than 650,000 people were experiencing homelessness on a single night in January 2023. OHA will continue to assist vulnerable populations by contributing permanent supportive housing programs and leasing Emergency Housing Vouchers (EHV), an effort that will continue in FY 2025, as OHA anticipates an award of additional EHV’s. Other efforts will include serving up to 180 families in the expanded Sponsor Based Housing Assistance (SBHAP) program to include up to 40 families exiting the Oakland Community Cabins. OHA received 81 new Stability Vouchers (SV) in FY 2023, designed to assist homeless households. OHA will continue to lease the SVs in FY 2025 utilizing the successful partnership with Alameda County Continuum of Care (CoC), built through the EHV and Foster Youth to Independence (FYI) leasing efforts to ensure efficient and rapid referrals and supportive services for applicants to continue the community wide commitment to reducing homelessness.

Homelessness remains a key issue in Oakland, as Oaklanders are facing some of the highest costs of living in the country. Oakland ranks as the 6<sup>th</sup> most expensive place to live in the U.S., according to Houzeo, which factors in the cost of living in the city, population, poverty rate, average household income, median listing price of a home in each city, in addition to the tax rate and transportation costs<sup>1</sup>. As of December 2023, per PayScale<sup>2</sup> Oakland has a cost of living 47% above the national average with utilities, groceries, health care and transportation costs around 30% higher than the national average. In a City with a majority of housing being renter-occupied, 59%, it is critical to note that while rent has decreased slightly from last year, 4%, the median rent is 18% higher in Oakland compared to the national average.

OHA intends to offset these challenges by offering increased payment standards of up to 150% depending on the program to increase the power of our applicants to compete for scarce and expensive housing. Additionally, new and increased owner incentives will be added to existing supports including referral bonuses for new owners joining the voucher program as a result of a

---

<sup>1</sup> <https://www.houzeo.com/blog/most-expensive-cities-in-the-us/>

<sup>2</sup> <https://www.payscale.com/cost-of-living-calculator/California-Oakland>

referral, application fee deposit assistance for all programs and expanded security deposit assistance. Mediation assistance and trainings are another new incentive OHA is exploring to assist owners and residents in conflict resolution. These initiatives join expanded housing navigation assistance efforts and new resident incentives such as Welcome Kits, pioneered for EHV families with essential household items being made available across more programs through MTW funding flexibility.

OHA's commitment to customer service remains unwavering as OHA continues to adapt to hybrid work options to promote safe and efficient operations. To uphold superior standards of customer service, OHA has established a dynamic Stakeholder and Community Engagement (SCE) team. This team is dedicated to addressing a wide range of customer complaints and inquiries directed to the executive office from external stakeholders including applicants, residents, property owners, community partner organizations, vendors, HUD, or the Mayor's Office. Beyond conflict resolution and active de-escalation efforts, the team demonstrates a commitment to building positive relationships while conducting thorough reviews of policies and procedures, making recommendations to ensure customer-centered policies align with OHA's goals and mission. Strategically positioned, the SCE team not only seeks out new and beneficial partnerships for OHA but also imparts knowledge on OHA policies and procedures to existing partners.

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

At a national level, the homelessness crisis remains a priority in the Biden-Harris administration. HUD reported in the 2022 Annual Homeless Assessment Report a 0.3% increase in the number



of people living on the street between 2020 and 2022; however, the latest point in time count conducted in January 2023, a 12% increase was reported in people experiencing homelessness from 2022 to 2023. Increased homelessness in 2023 continued a pre-pandemic trend from 2016-2020, likely due to many pandemic era protections expiring, including President Biden's American Rescue Plan.

In order to address the homelessness crisis the Biden-Harris Administration released the All In: The Federal Strategic Plan to Prevent and End Homelessness (All In) with the goal to reduce homelessness by 25% by 2025. *All In* was developed by the United States Interagency Council on Homelessness (USICH), with collective thinking

from 19 federal agencies that make up the USICH Council. The Council received feedback from thousands of providers, elected officials, advocates, and people who have experienced homelessness to create an evidence-based policy. *All In* aims to address systemic racism, advance equity, and focus on homeless prevention as well as reduction.

OHA supports these ambitious goals and acknowledges this is a critical step to move the needle on reducing homelessness while also expanding access to housing by supporting the development, preservation and rehabilitation of affordable housing. As described in #08-01, OHA anticipates providing funds to assist eight new affordable housing developments that may begin construction during the FY. The Rental Assistance Subsidy (RAS), described in detail in the “Use of Single Fund Flexibility” section, is projected to subsidize approximately 336 families through the addition of new affordable units in projects that will apply through various sources such as new state Homekey funding recipients, City of Oakland new construction NOFA project awards, and OHA’s Request for Proposal process. The RAS is a creative use of capital and assets for development and repositioning activities and support of projects falling short of resources where OHA can bridge the gap.

As funding mechanisms and OHA’s experience using MTW flexibilities has evolved, so too has our creativity to think outside the box to meet the continuing challenges presented by the pandemic, inflation, rising interest rates, and labor and materials costs which exacerbate the shortage of housing locally and nationwide. HUD is exploring a new research program to assist low-income families with cash payment subsidies instead of Housing Assistance Payments (HAP), to potentially mitigate some of the barriers to securing housing. During FY 2025, OHA plans to explore the possibility of using MTW flexibilities to pilot a similar cash payment subsidy program to increase families served by OHA funds. OHA plans to reach a 50% ratio of Project-Based Vouchers (PBV) to HCVs and complete long-term, multi-year development projects such as Brooklyn Basin, while simultaneously identifying and evaluating potential projects using new underwriting tools and pro-active strategies developed by staff. By developing a strategic approach and policies in line with agency short- and long-term development goals, OHA will be well-positioned to seize new opportunities and expand service-enriched housing.

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

While all staff within OHA are charged to serve and support our families, it is the principal task of OHA's Family and Community Partnership (FCP) department to assess needs and collaborate with other resident-facing teams including Leased Housing, Property Management, OHA Police Department (OHAPD), and the Stakeholder and Community Engagement (SCE) Team to design and deliver agency-led impactful services and resources for residents. These services range from emergency



support when a family is in crisis, to longer term programs designed to support the educational and/or employment goals of individuals and families to assist them in achieving their definition of success. OHA staff support families through the process of finding an apartment and becoming successfully leased to remain stably housed in a safe and secure environment. The "Use of Single Fund Flexibility" section describes many of our activities planned for impactful services, community engagement and resident safety and security.

During the FY, OHA will be introducing the Digital Equity project to begin laying fiber optic cable to provide free internet access at select OHA sites. In conjunction with this program, OHA will assist families who have fallen behind on internet payments, as described in the Single Fund Flexibility section.



OHA was awarded a new Jobs Plus Grant in FY 2023 to increase and help overcome barriers to employment for East Oakland public housing residents, mainly at Lockwood Gardens. The grant provides \$2.3M in funding from HUD, with matching funding of \$2.3M, provided by many of our partners including the Oakland Private Industry Council, the Lao Family Community

Development Center, Oakland Adult and Career Education, and Cyprus Mandela Training Center, as well as MTW single fund flexibility to ensure success. The FCP department plans to assist residents in overcoming challenges to obtaining gainful employment, including limited digital literacy, lack of transportation, accommodations for disabilities, and education, to name a few. Using the Jobs Plus grant, OHA will continue to support East Oakland Works (EOW) to provide individualized case management, digital and financial literacy training, and a variety of resources to address barriers to employment. This initiative projects to serve approximately 282 participants in the Earned Income Disregard program, 229 participant assessments, and plans post-assessment services to 212 participants.



Fostering healthy and safe communities to residents through our award-winning resident services team and police department prove to be critical in addressing the range of challenges that impact communities throughout the city. Staff and officers work to build trust and relationships through community events such as the Coffee with a Cop, bike excursions, Winter Wonderland Toy Drive and strong communication using modern technology. Community-based public safety continues to be a pillar of the department as they strive to provide excellent customer service to our resident community.

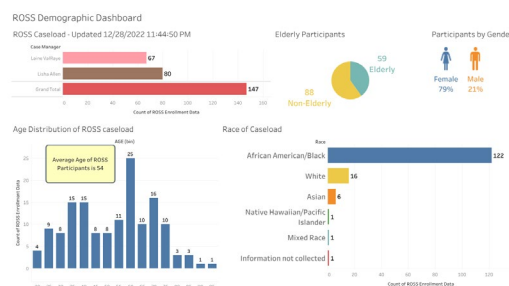


OHA's programs are designed to serve a wide spectrum of families with an array of services to support every family member. It starts with search navigation assistance to help those struggling to find an apartment in Oakland's competitive market. Once a family is housed, a plethora of programs and services are available to support the youth, parents, adults and seniors. Holistic and diverse programs are carefully selected to provide support to all aspects of life from achieving educational and employment goals, to basic yet critical needs such as food availability, mental health and parenting support, and wellness health checks all delivered through MTW single fund flexibility.

Effectively communicating the myriad of services available to stakeholders remains challenging. OHA plans to continue various modes of engagement and adopt methods that prove to be successful by careful monitoring and evaluating outcomes. With the formation of the Stakeholder and Community Engagement Team, OHA hopes to strengthen the communication gap, and address escalated complaints quickly to improve both resident and owner program satisfaction. OHA plans to enhance synergies between Property Management, OHAPD and FCP to identify vulnerable families for focused needs-based interventions, to prevent adversity and, whenever possible, allow staff to engage, employ and involve residents to improve and maintain their homes.

### *Expand board knowledge of OHA and its Affiliates*

OHA leadership understands the importance of promoting evidence-based policies. Equally as clear is the need to provide the Board of Commissioners (BOC) a strong foundational knowledge of legislative, programmatic, and financial performance for OHA and its component units to ensure informed oversight, vision for the agency, and endorsement of such policies. Additionally, staff intend to improve the availability of operational data and information to the public to increase transparency. In the years to come through a compilation of reports, dashboards, studies and research partnerships to support and guide the



decision-making process, staff will grow knowledge of OHA, which hopefully in turn will lead to program enhancements, partnership opportunities, and successful innovations. Better information through these methods also will culminate in strategic policies and priorities around allocation of agency resources to better align with OHA's mission and vision.

### **The MTW Annual Plan**

As required by the Agreement, OHA prepares its Annual Plan for submission to HUD each year. OHA uses the standard format described in Attachment B of the MTW Agreement, HUD form 50900. OHA's Annual Plan is intended to provide residents, the public, and HUD with information on OHA's programs and policies, including both approved and planned activities and operating budgets and capital investment plans. The following provides a summary of the sections of the FY 2025 MTW Plan:

#### **Section I. Introduction**

This section provides general information about the MTW Demonstration program, an overview of OHA's short-term and long-term goals for FY 2025, and a summary of the Plan.

#### **Section II. General Housing Authority Operating Information**

This section includes general housing stock, lease-up, and waiting list information as well as OHA's plan for maintaining compliance with the statutory requirements.

#### **Section III. Proposed MTW Activities**

This section includes information on the following proposed MTW activities. OHA proposes one new activity this year.

#### **Section IV. Approved MTW Activities**

This section includes information on all approved and ongoing MTW activities.

#### **Section V. Sources and Uses of Funding**

This section includes summary budget information for FY 2025 including planned sources and uses for MTW and non-MTW (special purpose) funds.

#### **Section VI. Administrative**

This section includes information on Board of Commissioners approvals and agency certifications.

#### **Section VII. Appendix**

This section includes additional information explaining the MTW Plan public outreach process, additional policy changes, and non-MTW related activities.

## Section II. General Housing Authority Operating Information

### A. Housing Stock Information

#### 1) Planned New Public Housing Units to be Added During the Fiscal Year

OHA does not anticipate adding any new public housing units during FY 2025. See Appendix D for an overview of OHA housing stock.

Table 1: Housing Stock Information										
Asset Management Project (AMP) Name and Number	Bedroom Size						Total Units	Population Type*	# of Uniform Federal Accessibility Standards (UFAS) Units	
	0/1	2+	3+	4+	5+	6+			Fully Accessible	Adaptable
N/A	0	0	0	0	0	0		N/A	N/A	N/A
N/A	0	0	0	0	0	0		N/A	N/A	N/A
N/A	0	0	0	0	0	0		N/A	N/A	N/A
N/A	0	0	0	0	0	0		N/A	N/A	N/A
Total Public Housing Units to be Added in the Plan Year								0		

#### 2) Planned Public Housing Units to be Removed During the Fiscal Year

In July 2018, the Department approved application #DDA0008342 to dispose of 253 units in three senior sites. The application sought to preserve the units and resolve longstanding issues related to chronic funding decreases in the public housing program, at Oak Grove North, Oak Grove South, and Harrison Towers. While Oak Grove North and South are completed, and have been placed back into service, OHA staff are actively pursuing disposition of Harrison Towers. Unfortunately, changes to the State of California's tax-exempt bond allocation procedures in late 2020 resulted in delays in securing the bonds and 4% Low Income Housing Tax Credits necessary to finance critical repairs and seismic upgrades to Harrison Towers. OHA staff continue to advance the architectural, engineering, resident relocation, legal and other predevelopment activities necessary to close on all construction financing and finalize the disposition of Harrison Towers. The target closing date is summer 2025, with the Agreement to enter into a Housing Assistance Payment (AHAP) contract execution immediately preceding the closing.



*Rental Assistance Demonstration (RAD)/Section 18 Blend Conversions*

OHA currently is working with the owners of three mixed-finance sites, Lion Creek Crossing (LCC) Phase I and II, and Foothill Family Apartments on comprehensive rehabilitations of the developments. OHA anticipates submitting applications for a Rental Assistance Demonstration (RAD) or RAD/Section 18 blend conversion of the public housing units in these properties to PBVs. OHA will apply for RAD/Section 18 blends in order to obtain the highest proportion of eligible Tenant Protection Vouchers (TPVs) in each of the conversions. The exact mix of RAD PBVs and



TPVs in the conversions is not known at this time. An estimated breakdown between the two types of vouchers based on current construction budgets is shown in Table 4 below but the actual mix of voucher types is subject to change as design and cost estimating for the rehabilitation projects continues. OHA may elect to convert these units through RAD without a Section 18 blend, or modify the projected mix of voucher types. The plans for these units are further described in Appendix L.

Rehabilitations of the properties will be completed by the owners in conjunction with the RAD/Section 18 conversion. The rehabilitation projects will require temporary relocation of some or all the tenants.

LCC Phase I and II is expected to close on the RAD/Section 18 blend conversion and begin construction on the rehabilitation project in summer 2024, with construction completed in six to twelve months. Major components of the rehab include improving building waterproofing, repairing, and rebuilding balconies, repairing and replacing deteriorated wood trim and trellises, and repainting the buildings.

The closing of the RAD/Section 18 blend conversion for Foothill Family Apartments and start of rehab is expected for the later in 2024. Major rehab items include replacement of unit heaters and water heaters; interior finishes including kitchens, bathrooms, flooring and paint; repair and remediation of moisture intrusion and dry rot on building trim, decks and trellises; exterior paint, landscaping, hardscape and playground structure replacement; and handicapped accessibility improvements.

OHA is working with the owners of LCC Phases III and IV to evaluate the feasibility of a conversion of the public housing units in those properties to PBV as RAD or RAD/Section 18 blend conversions. The conversion of these public housing units through RAD/Section 18 blends to project-based subsidy provides a more stable funding platform that facilitates future refinancing or re-syndication transactions, resulting in greater funding availability for capital improvements to benefit the properties. It also streamlines the operations and management of these properties by simplifying the compliance and reporting requirements by reducing the number of operating subsidy sources.



OHA will also explore the feasibility of RAD or RAD/Section 18 blend conversions of the public housing units in its other mixed-finance properties, including Chestnut Court, Linden Court, and Mandela Gateway. OHA may submit RAD or RAD/Section 18 blend applications for these properties during the Plan year.

The RAD PBV contracts that will be executed as a result of the RAD conversions have a number of differences compared to other PBV contracts issued by OHA. Notably, with the new RAD PBV contracts the initial rent-setting and rent adjustment mechanisms are tied to the current Annual Contributions Contract (ACC) subsidy and do not allow owners to periodically request market-based rent adjustments as is allowed with customary agency PBV contracts. Additionally, there are a number of tenant protections that will be extended to residents through the RAD program that more closely resemble those afforded under public housing programs, with the intent of avoiding any adverse consequences for tenants as a result of conversion. In general, the tenant protections from the RAD program also apply to Section 18 TPVs in the same property that are obtained through a RAD/Section 18 blend approval.

Table 2: Planned Public Housing Units to be Removed		
AMP Name and Number	Number of Units to be Removed	Explanation for Removal
Harrison Towers	101	Disposition Application #DDA0008342
Lion Creek Crossing I & II	99	RAD/Section 18 blend conversion
Lion Creek Crossing III	37	RAD/Section 18 blend conversion
Lion Creek Crossing IV	21	RAD/Section 18 blend conversion
Foothill Family	21	RAD/Section 18 blend conversion
Chestnut Court	45	RAD/Section 18 blend conversion
Linden Court	38	RAD/Section 18 blend conversion
Mandela Gateway	46	RAD/Section 18 blend conversion
Total Number of Units to be Removed During Plan Year:		408

### 3) New Housing Choice Vouchers to be Project-Based During the Fiscal Year

In FY 2025 and should there be any, OHA will issue a Request for Proposals to award available Project-Based Vouchers (PBV) to new projects. OHA also plans to add 91 new PBVs through continued lease up of previously conditionally awarded units at new construction properties.

All planned 91 PBVs in FY 2025 are new construction units that have previously been awarded throughout the City of Oakland funding competitions. Below is a breakdown of

the expected 91 PBV units where at least an AHAP contract is in place by end of FY 2025. The 91 units are made up of units from the non-RAD projects listed in Table 3, below, consisting of 3801 MLK Family Housing, 34th and San Pablo, 285 12th St, and Friendship Senior Housing.

OHA plans to create 120 PBVs through the conversion of public housing units with RAD/Section 18 blends at LCC I & II and Foothill Family Apartments if the conversions are not completed during FY 2024. LCC I & II has 99 public housing units which will convert to PBV and Foothill Family Apartments has 21 public housing units that will convert to PBV.

OHA will continue to evaluate and plan the feasibility of converting additional public housing units in mixed-finance developments, including LCC III (37 units), LCC IV (72 units), Linden Court (38 units), Chestnut Court (45 units), and Mandela Gateway (46 units) to PBV through RAD and or RAD/Section 18 blend conversions. Additionally, OHA plans to utilize 45, non-MTW, VASH vouchers during the FY.

OHA may use its Faircloth Authority to create RAD PBVs through Faircloth-to-RAD conversions. OHA may provide Faircloth-to-RAD PBVs to sites owned by OHA or its affiliates or projects developed by other organizations. OHA will follow all applicable requirements of the OHA Administrative Plan, HUD Office of Public Housing Investments Mixed-Finance Program, the RAD Program, and any other applicable guidelines and regulations in selecting units to receive PBVs through Faircloth-to-RAD conversions. OHA may choose to use MTW funds to augment the contract rents for the RAD PBVs.

**Table 3: Planned New Project-Based Vouchers**

Project-based for the first-time during plan year where at least an AHAP is in place by end of plan year

Property Name	Number of Vouchers Project Based	RAD ?	Description of Project
3801 MLK Family Housing	16	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.
34th and San Pablo	25	No	This project, in partnership with EBALDC, will provide 60 new homes affordable to families with incomes up to 60% of Area Median Income. The building will contain 13 studios, 13 one-bedroom, 22 two-bedroom, and 12 three-bedroom apartments for a total of 106 bedrooms.
285 12th St	16,	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 12th and Harrison St. in downtown Oakland.
Friendship Senior Housing	34	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.
Foothill Family Apartments	21	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property controlled by Oakland Housing Initiatives, an affiliate of the Authority. The rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.
Lion Creek Crossing Phase I	45	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property developed in partnership with Related California and EBALDC. A tax-credit financed rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.

Lion Creek Crossing Phase II	54	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property developed in partnership with Related California and EBALDC. A tax-credit financed rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.
Lion Creek Crossing Phase III	37	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property developed in partnership with Related California and EBALDC. A tax-credit financed rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.
Lion Creek Crossing Phase IV	72	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property developed in partnership with Related California and EBALDC. A tax-credit financed rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.
Linden Court	38	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property developed in partnership with BRIDGE. A tax-credit financed rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.
Chestnut Court	45	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property developed in partnership with BRIDGE. A tax-credit financed rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.
Mandela Gateway	46	Yes	RAD/Section 18 blend conversion of the Public Housing units in a mixed-finance property developed in partnership with BRIDGE. A tax-credit financed rehabilitation of the property will be completed in conjunction with the RAD/Section 18 conversion.
<b>Planned Total Vouchers to be Newly Project-Based:</b>			<b>449</b>

<b>Table 4: Planned Existing Project-Based Vouchers</b> <b>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 in place by the beginning of the Plan Year.</b>				
Property Name	Number of Vouchers Project Based	Status at End of Plan Year	RAD?	Description of Project
Mandela Gateway	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.
Alteheim Senior Housing Phase I	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	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	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	Leased/Issued	No	The 3rd 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	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	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	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	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.
14th St at Central Station	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	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	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	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	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	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	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	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	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	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	Leased/Issued	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	Leased/Issued	No	The 4th 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	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	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	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 <sup>th</sup> and Oak)	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 <sup>th</sup> Street Apts (aka Clinton Commons)	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	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	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	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	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	Leased/Issued	No	The 2nd 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	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	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	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	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	Leased/Issued	No	An affordable housing project of 32 units in 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	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	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	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	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	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	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	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	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.

11th and Jackson (Prosperity Place)	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	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	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	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	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	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	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 28th 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	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	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	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	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	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	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	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	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	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	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	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	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 (94th and International	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	Leased/Issued	No	The Hamilton Apartments is located at 510 21st 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	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	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	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	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	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	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	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	Leased/Issued	No	New construction of 43 affordable units which will replace a vacant 1,000 sqf industrial building. The project includes permanent supportive housing for individuals currently experiencing homelessness.
Coliseum Place	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	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	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	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	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.
95th and International	27	Leased/Issued	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	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.
Foon Lok West (formerly known as Brooklyn Basin 3)	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.
Fruitvale Transit Village - Phase IIB	75	Leased/Issued	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)	61	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.
7th and Campbell	39	Leased/Issued	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.
Ancora Place	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.

West Grand and Brush	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.
<div>4805</div> <b>Planned Total Existing Project-Based Vouchers</b>				

#### 4) Other Changes to the Housing Stock Anticipated During the Fiscal Year

During FY 2025, OHA will continue to support the development of affordable housing stock by nonprofit developers in Oakland.

OHA anticipates helping finance eight new affordable housing developments that may start construction during FY 2025.

- 500 Lake Park Avenue is a planned 53-unit affordable housing building with 18 HUD-VASH PBVs allocated.
- 285 12th Street will be a 65 unit building with approximately 3,500 square feet of ground floor commercial space. OHA has committed to providing 16 general purpose PBVs and 8 HUD VASH PBVs to 285 12th Street, purchasing the site at the close of construction financing, and providing soft loans to the project.
- Mandela Station Affordable (MSA) is part of a master plan for transit-oriented development at the West Oakland BART station. MSA is planned to have 240 units and 16,000 square feet of ground floor space used for commercial activities or resident services providers. OHA has agreed to a non-binding term sheet for its contributions to the project. Negotiations toward a binding commitment of MTW funds and PBVs are in progress and may conclude in FY 2025.
- Harrison Tower will require substantial rehabilitation of the building including seismic upgrades, the replacement of all building systems and updating all 101-units and common area amenities to significantly improve resident safety and their living environment. OHA staff continue to advance the architectural, engineering, resident relocation, legal and other predevelopment activities necessary to close construction financing and finalize the disposition of Harrison Tower.

- 2700 International Boulevard is a planned new construction mixed-use affordable development with 75-units for very low-income families and 3,800 square feet of community-serving commercial space. OHA has committed 19 VASH vouchers for extremely low-income Veterans with the remaining units serving very low-income families.
- Lake Merritt BART Senior Housing is a 97-unit transit-oriented affordable development for low-income and formerly homeless seniors located in Oakland's Chinatown neighborhood. The project will be constructed on BART-owned land directly over the Lake Merritt BART station and will be the first of four buildings that are part of larger-multi-phase transit-oriented development in partnership with Strada Investment Group and BART.
- Foothill Family Apartments is a 65-unit mixed-finance affordable housing development that is wholly owned by OHA and Oakland Housing Initiatives, a nonprofit affiliate of OHA. Foothill Family Apartments is approximately 20 years old and has rehab requirements including replacement of building systems at the end of their useful life, dry rot, accessibility, and other deferred maintenance issues. OHA and OHI are currently working to define the scope of the rehab and develop construction and permit drawings.
- 77<sup>th</sup> and Bancroft is a proposed 90-unit new construction development for very low-income seniors. The site is owned by the California Affordable Housing Initiatives, Inc. (CAHI), a nonprofit affiliate of OHA.

All projects are currently working to assemble additional financing sources. If successful with assembling gap financing, with the exception of Foothill Family Apartments, they will apply for 4% Low-Income Housing Tax Credits and tax-exempt bonds or 9% tax credits. The Foothill Family Apartments rehab does not anticipate using tax credit financing. Depending on success in obtaining financing, one or more of these projects may begin construction in FY 2025.

**Table 5: Planned 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.

During FY 2025, OHA will continue to support the development of affordable housing stock by nonprofit developers in Oakland.

OHA anticipates to help finance eight new affordable housing developments that may start construction during FY 2025.

- 500 Lake Park Avenue is a planned 53-unit affordable housing building with 18 HUD-VASH PBVs allocated.
- 285 12th Street will be a 65 unit building with approximately 3,500 square feet of ground floor commercial space. OHA has committed to providing 16 general purpose PBVs and 8 HUD VASH

PBVs to 285 12th Street, purchasing the site at the close of construction financing, and providing soft loans to the project.

- Mandela Station Affordable (MSA) is part of a master plan for transit-oriented development at the West Oakland BART station. MSA is planned to have 240 units and 16,000 square feet of ground floor space used for commercial activities or resident services providers. OHA has agreed to a non-binding term sheet for its contributions to the project. Negotiations toward a binding commitment of MTW funds and PBVs are in progress and may conclude in FY 2025.
- Harrison Tower will require substantial rehabilitation of the building including seismic upgrades, the replacement of all building systems and updating all 101-units and common area amenities to significantly improve resident safety and their living environment. OHA staff continue to advance the architectural, engineering, resident relocation, legal and other predevelopment activities necessary to close construction financing and finalize the disposition of Harrison Tower.
- 2700 International Boulevard is a planned new construction mixed-use affordable development with 75-units for very low-income families and 3,800 square feet of community-serving commercial space. OHA has committed 19 VASH vouchers for extremely low-income Veterans with the remaining units serving very low-income families.
- Lake Merritt BART Senior Housing is a 97-unit transit-oriented affordable development for low-income and formerly homeless seniors located in Oakland's Chinatown neighborhood. The project will be constructed on BART-owned land directly over the Lake Merritt BART station and will be the first of four buildings that are part of larger-multi-phase transit-oriented development in partnership with Strada Investment Group and BART.
- Foothill Family Apartments is a 65-unit mixed-finance affordable housing development that is wholly owned by OHA and Oakland Housing Initiatives, a nonprofit affiliate of OHA. Foothill Family Apartments is approximately 20 years old and has rehab requirements including replacement of building systems at the end of their useful life, dry rot, accessibility, and other deferred maintenance issues. OHA and OHI are currently working to define the scope of the rehab and develop construction and permit drawings.
- 77<sup>th</sup> and Bancroft is a proposed 90-unit new construction development for very low-income seniors. The site is owned by the California Affordable Housing Initiatives, Inc. (CAHI), a nonprofit affiliate of OHA.

All projects are currently working to assemble additional financing sources. If successful with assembling gap financing, they will apply for 4% Low-Income Housing Tax Credits and tax-exempt bonds or 9% tax credits. Depending on success in obtaining financing, one or more of these projects may begin construction in FY 2025.

## **5) General Description of All Planned Capital Expenditures During the Fiscal Year**

OHA anticipates a \$5.7M dollar FY 2025 Capital Fund Grant which is included in the MTW Block Grant. Through use of its MTW single fund flexibility, OHA projects spending approximately \$72.8M on capital projects using MTW funds. Approximately \$9.7M will be invested in public housing properties. OHA expects to complete projects that will preserve and enhance each of its public housing sites, investing in site improvements, modernization of building systems, and rehabilitating unit interiors.

OHA is investing \$49.8M in affordable housing development and preservation, including new construction at Lakehouse – East 12<sup>th</sup> Street and Mandela Station Affordable, as well

as preservation at Harrison Towers and Foothill Family Apartments. OHA anticipates expending approximately \$8.9M of MTW funds on exterior and interior building improvements at seven OHA district offices including Harrison Street and the Service Center.

Staff will use MTW funds to purchase approximately \$4.4M of information technology network security, hardware & software, vehicles, security equipment, and office equipment.

A table describing all FY 2025 Capital Expenditures is included in Appendix B.

Table 6:
General Description of All Planned Capital Expenditures During the Plan Year
Narrative of general description of all capital expenditures of MTW funds during the Plan Year
<p>OHA anticipates a \$5.7M dollar FY 2025 Capital Fund Grant which is included in the MTW Block Grant. Through use of its MTW single fund flexibility, OHA projects spending approximately \$72.8M on capital projects using MTW funds. Approximately \$9.7M will be invested in public housing properties. OHA expects to complete projects that will preserve and enhance each of its public housing sites, investing in site improvements, modernization of building systems, and rehabilitating unit interiors.</p> <p>OHA is investing \$49.8M in affordable housing development and preservation, including new construction at Lakehouse – East 12<sup>th</sup> Street and Mandela Station Affordable, as well as preservation at Harrison Towers and Foothill Family Apartments. OHA anticipates expending approximately \$8.9M of MTW funds on exterior and interior building improvements at seven OHA district offices including Harrison Street and the Service Center.</p> <p>Staff will use MTW funds to purchase approximately \$4.4M of information technology network security, hardware &amp; software, vehicles, security equipment, and office equipment.</p> <p>A table describing all FY 2025 Capital Expenditures is included in Appendix B.</p>

## B. Leasing Information

### 1) Planned Number of Households Served at End of the Fiscal Year

#### Housing Choice Voucher (HCV)

OHA has slowed the issuance of project-based assistance over the last several years as the proportion of the portfolio committed to PBV assistance exceeded 40. Currently, the Authority's PBV policy sets a target not to exceed 50% of the overall voucher portfolio. OHA will continue implementation of multiple strategies using MTW flexibility to further maximize the number of families served in Oakland. OHA's owner incentives activities detailed in Activity #17-01 to recruit new and retain existing landlords began in 2018 and FY 2025 will see the implementation of new and expanded components such as increased bonuses for bringing new units to the program for both existing and new owners, awards to owners to



address HQS fails up to \$2,250, Exception Payment Standards Hubs for areas of low-poverty and other desirable characteristics, referral bonuses for referrals of new owners, expanded security deposit assistance to all voucher programs, application fee assistance, mediation benefits to increase owner satisfaction, a staff person dedicated to housing navigation, education, owner recruitment, and incentives for owners to sell their property to HCV participants that are leasing the home.

A review of the project-based voucher awards has shown that some partners are not able to lease units in a timely fashion. OHA plans to re-examine awards that are unused and create strategies to redeploy those unused awards to projects that are better able to utilize the subsidy right away. OHA will continue the process to bring PBV subsidy awarded units online as environmental reviews, HQS inspections and eligibility determinations are completed. Through new development units coming online such and PBV projects described in Table 3, OHA anticipates that traditional HCV utilization rates of approximately 98% of budget authority. OHA has a goal to reach 91% of voucher utilization, an increase of 3% from start of the FY. Any available voucher budget authority beyond the 91% threshold will serve, maintain, and create Local Non-Traditional housing options detailed below.

#### **Local, Non-traditional (LNT)**

OHA has several tenant-based local, non-traditional programs that serve specialized populations. These programs include our Sponsor-based Housing Assistance Program developed in 2010, serving homeless families in encampments and emancipated foster youth exiting the criminal justice system, and has capacity to serve approximately 180 families monthly. Projections for FY 2025 are for the program to serve 175 families on average per month. Under the Building Bridges initiative, OHA plans to serve families through BB-CalWorks in partnership with Alameda County and projects to serve 30 families. In total, OHA projects to serve 205 families through tenant-based local, non-traditional programs. These programs are described in detail in Activity #11-05.

Property based Local, Non-Traditional programs include Low-Income Housing Tax Credit units which were developed using MTW single fund flexibility and account for the largest portion of OHA's local, non-traditional families. OHA will serve approximately 227 households during the fiscal year through the Building Bridges initiatives which serve various vulnerable populations some of which is service enriched housing: single room occupancy (SRO) units, shared housing and transitional units for Veterans, foster youth and other special needs populations and Key to Home. Key to Home (BB-KTH) is a partnership with Alameda County and local service providers to house homeless families with children in service-enriched housing. OHA plans to continue to serve families through the Homekey program, projecting to serve approximately 36 families during FY 2025. These programs are described in detail in activity #10-06 and #11-03.

While we will continue to serve families through our LNT programs, some of these programs have been closed out or re-envisioned. The Building Bridges-Transitional Housing Plus (BB-THP+), a program that assisted foster youth who aged out of foster care, paused due to leasing challenges. OHA will evaluate the program to identify the issues and release a Request for Proposal (RFP) to identify new potential partners to serve this same population during the FY. Additionally, the Parents and Children Together (PACT) program with the Alameda County Sheriff's Office (ACSO), which provided service-enriched housing, reuniting parents with their children after incarceration, will be evaluated and redesigned during the FY. Staff will use FY 2025 to revise the program and the partnership and projects to relaunch in the next FY. OHA will explore a similar transitional housing assistance program in partnership with UCSF Benioff Children's Hospital to focus on assisting families faced with serious or chronic illnesses where the lack of housing is a barrier to improved health outcomes. OHA expects to serve approximately 1,563 LNT families through these innovative property-based local programs.

### Public Housing

In the public housing program, occupancy is projected to remain close to 98% in sites, although the portfolio will be going through both RAD and Section 18 Disposition (discussed above and in the Changes to Housing Stock Section) during the fiscal year which could impact the occupancy rate. Harrison Towers is projected to close financing for its disposition in Summer 2024 and relocation of residents may occur during FY 2025. LCC I & II and Foothill Family Apartments are projected to undergo RAD/Section 18 blend conversions which will convert 120 units of public housing to PBV subsidies.



In total, OHA projects that 15,606 families will be served by its MTW programs during FY 2025, as indicated in Table 7. This number reflects increases in local, non-traditional households and Housing Choice Voucher households as more units are brought online through completion of development initiatives and leasing up PBV units that are in the pipeline through conditional and other awards. Appendix D includes an overview of OHA's Housing Inventory including both MTW and Non-MTW households.

Table 7: Planned 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.		
Planned Number of Households Served Through:	Planned Number of Unit Months Occupied/Leased*	Planned Number of Households Served**
MTW Public Housing Units Leased	12,180	1,015

MTW Housing Choice Vouchers Utilized	153,336	12,778
Local, Non-Traditional: Tenant-Based ^	2,556	213
Local, Non-Traditional: Property-Based ^	19,200	1,600
Local, Non-Traditional: Homeownership ^	0	0

**Planned/Actual Totals:** **187,272** **15,606**

\* "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).

^ In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households served, the MTW PHA should estimate the number of households to be served.

**Table 8: Detail on Local Non-Traditional Number of Households Served**

Local, Non-Traditional Category	MTW Activity Name/Number	Planned Number of Unit Months Occupied/Leased*	Planned Number of Households Served**
Property-Based	Fund Affordable Housing Development Activities (08-01)	408	34
Property-Based	Fund Affordable Housing Development Activities (08-01) - Tax credit units in service in total through the start of FY2024	13,632	1,136
Tenant-Based	Local Housing Assistance Program (10-06)- LHAP, SBHAP, BB-CalWorks,	2,568	214
Property-Based	Local Housing Assistance Program (10-06) - BB-KTH	276	23
Property-Based	Local Housing Assistance Program (10-06) – Homekey & RAS- Coliseum Way	144	12
Property-Based	PBV Transitional Housing Programs (11-05) – PACT and Building Bridges	468	39
Property-Based	PBV Transitional Housing Programs (11-03) – Homekey & RAS – Coliseum Way	288	24
Property-Based	SRO/Studio Apartment Preservation Program (11-03)- Building Bridges	1,896	158
Property-Based	Local Housing Assistance Program (10-06) – RAS projects: Phoenix	1,212	101
Property-Based	Local Housing Assistance Program (10-06) – RAS projects:	396	33

	OHA RFP Projects		
Property-Based	Local Housing Assistance Program (10-06) – DHAP: 7 <sup>th</sup> and Campbell	468	39
<b>Planned/Actual Totals:</b>		<b>21,756</b>	<b>1,813</b>
<p>* "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).</p> <p>** "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).</p> <p>^ In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households served, the MTW PHA should estimate the number of households to be served.</p>			

## 2) Planned Description of any Anticipated Issues Related to Leasing of Public Housing, Housing Choice Vouchers and/or Local, Non-Traditional Units and Possible Solutions

### Housing Choice Voucher

OHA expects the local rental market will continue to be strong in FY 2025, as it has remained expensive even during the pandemic as demand for housing remained high and inventory levels remain low in the affordable housing space. OHA will continue implementation of multiple strategies using MTW flexibility to further maximize the number of families served in Oakland and facilitate leasing of new units. OHA's Owner Incentives activities to recruit and maintain new landlords began in 2018 and FY 2025 will see the implementation of new and improved components such as increased bonuses for new and existing owners, referral bonuses for owners referring a new owner, application fee assistance for applicants, and expanded security deposit assistance to all voucher programs, funding for owners to address HQS fails up to \$2,250 for approved expenditures, Exception Payment Standards Hubs, mediation assistance for owners and residents, and an incentive designed to motivate homeowners to sell their property to OHA participants residing in the property. A review of the project-based voucher awards has shown that some partners are not able to lease up units in a timely fashion for various reasons. OHA plans to look at re-examining unused awards that do not have contingent financing and create strategies to redeploy those unused awards to projects that are better able to utilize the subsidy right away. Lastly, OHA will continue its Housing Navigation Search assistance program and lease compliance supports to assist clients in finding units and remaining housed.

OHA historically extended the amount of time required to reside in a PBV unit to two years instead of one to request a tenant-based voucher. OHA plans to expand the policy to restrict the option to request a tenant-based subsidy but may maintain a waitlist of requests from participants who request tenant-based assistance after a two year stay in a PBV unit.

### **Public Housing**

OHA will continue the planning and implementation for a major rehabilitation and disposition of Harrison Towers and will employ strategies to minimize impacts on residents during the project completion. OHA expects to maintain a 2% or less vacancy rate in its public housing units, not impacted by disposition.

### **Local, Non-traditional**

#### *Sponsor-Based Housing Assistance (SBHAP) and Building Bridges Programs*

OHA seeks to serve families through local, non-traditional (LNT) program models such as the Sponsor-Based Housing Assistance Program (SBHAP), which provides services enriched housing for special needs populations that would have difficulty accessing the traditional Section 8 and Section 9 programs. The SBHAP partner agencies, selected for their expertise by the City, provide intensive case management, master leasing and supportive services. However, OHA has seen these partners impacted by staff turnover and less staff available during the pandemic impacting leasing as new staff came up to speed and existing staff struggled to fully utilize the resources. With the advent of the new partnership with City of Oakland to house families exiting the Community Cabins, OHA anticipates there to be a learning curve and there is still a possibility of lingering staffing impacts from the pandemic, reflected by the less than full occupancy.

#### *Building Bridges*

Building Bridges SRO provides monthly operating subsidies to existing service enriched single-room occupancy (SRO) units, shared housing and transitional housing units set aside for veterans, emancipated foster youth, or other special needs populations. Of these two, the shared/transitional housing has the most turnover and attrition and typically higher vacancy rates and lead times to fill units. We expect some leasing issues to continue due to the pandemic causing staffing impacts to some OHA partners, while other partners have been able to maintain steady occupancy since program inception.

Under the OHA MTW Building Bridges-CalWORKs program, OHA provides rental assistance (up to 2 years) for formerly homeless Alameda County Social Services Agency (ACSSA) CalWORKs clients who are housed in Oakland and are employable and actively engaged in a plan to achieve self-sufficiency. OHA expects a steady amount of leasing the program in FY 2025 but is dependent on its partners for referrals.

The Building Bridges – Key to Home (KTH) program projects to serve 23 families through a local property-based housing assistance program in partnership with Alameda County and OAHPI. Alameda County will provide supportive services and case management and OAHPI will contract with a third-party to provide property management and additional resident supportive services. OHA does not anticipate any leasing issues with this program.

#### *Homekey*

OHA is open to continuing to partner with the City of Oakland and the State of California Department of Housing & Community Development through its Homekey Program to rapidly expand housing for persons experiencing homelessness or at-risk of homelessness. The projects are subject to clearance under the National Environmental Policy Act (NEPA). Homekey is adding 24 SRO units, and 12 larger units, more detail can be found in #11-03 and #10-06.

#### *Rental Assistance Subsidy (RAS)*

OHA's new rental assistance subsidy (RAS) program funds capital operating reserves for projects that apply and meet criteria as described in detail in the Use of Single Fund Flexibility section to create a new rental subsidy local non-traditional program. These projects will have to meet NEPA and HQS requirements and pass any subsidy layering reviews that may be required by layered funding sources. Projects slated to use this funding are described in more detail in activity #10-06, including Coliseum Way, The Phoenix, 3050 International Blvd., Lakehouse – East 12<sup>th</sup> Street, Lake Merritt BART Senior, and projects anticipated to apply through OHA's RFP process.

<b>Table 9: Discussion of Any Planned Issues/Solutions Related to Leasing</b>	
<b>Discussion of any anticipated issues and possible solutions related to leasing.</b>	
<b>Housing Program</b>	<b>Description of Actual Leasing Issues and Solutions</b>
MTW Public Housing	OHA will continue the planning and implementation for a major rehabilitation and disposition of Harrison Towers and will employ strategies to minimize impacts on residents during the project completion. OHA expects to maintain a 2% or less vacancy rate in its public housing units, not impacted by disposition.
MTW Housing Choice Voucher	OHA expects the local rental market will continue to be strong in FY 2025, as it has remained expensive even during the pandemic as demand for housing remained high and inventory levels remain low in the affordable housing space. OHA will continue implementation of multiple strategies using MTW flexibility to further maximize the number of families served in Oakland and facilitate leasing of new units. OHA's Owner Incentives activities to recruit and maintain new landlords began in 2018 and FY 2025 will see the implementation of new and improved components such as increased bonuses for new and existing owners, referral bonuses for owners referring a new owner, application fee assistance for applicants,



	<p>and expanded security deposit assistance to all voucher programs, funding for owners to address HQS fails up to \$2,250 for approved expenditures, Exception Payment Standards Hubs, mediation assistance for owners and residents, and an incentive designed to motivate homeowners to sell their property to OHA participants residing in the property. A review of the project-based voucher awards has shown that some partners are not able to lease up units in a timely fashion for various reasons. OHA plans to look at re-examining unused awards that do not have contingent financing and create strategies to redeploy those unused awards to projects that are better able to utilize the subsidy right away. Lastly, OHA will continue its Housing Navigation Search assistance program and lease compliance supports to assist clients in finding units and remaining housed.</p> <p>OHA historically extended the amount of time required to reside in a PBV unit to two years instead of one to request a tenant-based voucher. OHA plans to expand the policy to restrict the option to request a tenant-based subsidy but may maintain a waitlist of requests from participants who request tenant-based assistance after a two year stay in a PBV unit.</p>
Local, Non-Traditional	<p><i>Sponsor-Based Housing Assistance (SBHAP) and Building Bridges Programs</i></p> <p>OHA seeks to serve families through local, non-traditional (LNT) program models such as the Sponsor-Based Housing Assistance Program (SBHAP), which provides services enriched housing for special needs populations that would have difficulty accessing the traditional Section 8 and Section 9 programs. The SBHAP partner agencies, selected for their expertise by the City, provide intensive case management, master leasing and supportive services. However, OHA has seen these partners impacted by staff turnover and less staff available during the pandemic impacting leasing as new staff came up to speed and existing staff struggled to fully utilize the resources. With the advent of the new partnership with City of Oakland to house families exiting the Community Cabins, OHA anticipates there to be a learning curve and there is still a possibility of lingering staffing impacts from the pandemic, reflected by the less than full occupancy.</p> <p><i>Building Bridges</i></p> <p>Building Bridges SRO provides monthly operating subsidies to existing service enriched single-room occupancy (SRO) units, shared housing and transitional housing units set aside for veterans, emancipated foster youth, or other special needs populations. Of these two, the shared/transitional housing has the most turnover and attrition and typically higher vacancy rates and lead times to fill units. We expect some leasing issues to continue due to the pandemic causing staffing impacts to some OHA partners, while other partners have been able to maintain steady occupancy since program inception.</p> <p>Under the OHA MTW Building Bridges-CalWORKs program, OHA provides rental assistance (up to 2 years) for formerly homeless Alameda County Social Services Agency (ACSSA) CalWORKs clients who are housed in Oakland and are employable and actively engaged in a plan to achieve</p>

	<p>self-sufficiency. OHA expects a steady amount of leasing the program in FY 2025 but is dependent on its partners for referrals.</p> <p><i>The Building Bridges – Key to Home (KTH)</i> program projects to serve 23 families through a local property-based housing assistance program in partnership with Alameda County and OAHPI. Alameda County will provide supportive services and case management and OAHPI will contract with a third-party to provide property management and additional resident supportive services. OHA does not anticipate any leasing issues with this program.</p> <p><i>Homekey</i> OHA is open to continuing to partner with the City of Oakland and the State of California Department of Housing &amp; Community Development through its Homekey Program to rapidly expand housing for persons experiencing homelessness or at-risk of homelessness. The projects are subject to clearance under the National Environmental Policy Act (NEPA). Homekey is adding 24 SRO units, and 12 larger units, more detail can be found in #11-03 and #10-06.</p> <p><i>Rental Assistance Subsidy (RAS)</i> OHA's new rental assistance subsidy (RAS) program funds capital operating reserves for projects that apply and meet criteria as described in detail in the Use of Single Fund Flexibility section to create a new rental subsidy local non-traditional program. These projects will have to meet NEPA and HQS requirements and pass any subsidy layering reviews that may be required by layered funding sources. Projects slated to use this funding are described in more detail in activity #10-06, including Coliseum Way, The Phoenix, 3050 International Blvd., Lakehouse – East 12<sup>th</sup> Street, Lake Merritt BART Senior, and projects anticipated to apply through OHA's RFP process.</p>
--	--

### C. Wait List Information

Table 10: Planned Waiting List Information				
Snapshot information of waiting list data as anticipated at the beginning 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?	Will the waitlist be opened during the plan year?
Housing Choice Voucher: Tenant-Based	Community Wide	0	Closed	Yes, the waitlist will open in FY 2025.
Housing Choice Voucher: Project-	Site-Based	200	Closed	No.

Based - OHA Managed				
Housing Choice Voucher: Project-Based- Third Party Managed	Site-Based (Third Party Managed)	46,497	Open	Yes, anticipating at least 7 sites will open waitlists this FY, including Monarch Apts, Effie's House, and Oakland Point. Some sites continuously open.
Public Housing - OHA Managed	Site-Based (OHA Managed)	200	Closed	Yes
Public Housing- Third Party Managed	Site-Based (Third Party Managed)	1,250	Open	Yes

Table 11: Planned Changes to the Waiting List in the Plan Year	
Please describe any actual changes to the organizational structure or policies of the waiting lists(s), including any opening or closing of a waiting list, during the Plan Year.	
Waiting List Name	Description of Actual Changes to the Waiting List
Housing Choice Voucher: Tenant-Based	OHA plans to review preferences based on a demographic analysis and may use weighting for prioritization. This waitlist will be open during the FY.
Housing Choice Voucher: Project-Based - OHA Managed	The owner plans to administer one waitlist for 6 sites. OHA may explore continuously open waitlists for certain bedroom sizes and also may group applicants by bedroom size requirements.
Housing Choice Voucher: Project-Based- Third Party Managed	Lion Creek Crossings phase 1-5 is a joint waitlist and will be open for all bedroom sizes.
Public Housing - OHA Managed	Some waitlists may be combined to improve efficiency. OHA plans to open this waitlist during the FY.

Public Housing- Third Party Managed	Waitlists will be open for all bedroom sized for Lion Creek Crossing phases 1-4. Tassafaronga waitlists are consistently open. Applicants for any sites converting through RAD will be maintained as is on combined site-based waitlists or transferred to existing PBV site-based waitlists for these sites with the date and time of application being maintained.
Local Non-Traditional (PACT)	Open for graduates of ASCO MOMs and DADs programs.

## Section III. Proposed MTW Activities

This section includes information on proposed MTW activities where OHA is requesting HUD approval.

Proposed MTW Activities					
Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
25-01	2025	Asset Limit Modification	Allow OHA to increase the asset limit specified in HOTMA to establish an increased limit of \$250,000 and extend the program eligibility for 6 additional months.	Increase housing choices	Attachment C, Section D.8.

### MTW Activity #25-01: Asset Limit Modifications

#### A. Describe the Proposed Activity

HUD recently issued a final rule implementing the Housing Opportunity Through Modernization Act of 2016 (HOTMA), focused on implementing sections 102 regarding Income Reviews, and 104 regarding Asset Limits. HOTMA 104 establishes a \$100,000 asset limit, as annually adjusted with the Consumer Price Index for Urban Wage Earners and Clerical Workers, applicable to both eligibility and continued assistance. PHAs may delay enforcement or termination proceedings for up to six months, 5.618(d), if the family exceeds the asset threshold at the time of annual reexamination.

With the planned implementation of new HOTMA sections in FY 2025, OHA plans to extend the time frame of termination for households with excess assets. This activity will extend the regulatory period by an additional six months to allow residents to receive supportive services in preparation of graduation from assistance. This extension will allow for a total of 12 months before termination after excess assets are identified. OHA also plans to increase the asset limit from \$100,000 to \$250,000 for existing participants and enforce the \$100,000 asset limitation for eligibility.

OHA will increase the asset limit, stated in 24 CFR 5.618(a), from \$100,000 to \$250,000 for all OHA families. OHA's decision to increase the asset limit considers the higher cost of living in the Bay Area, which is 44% higher than the national average.<sup>3</sup> According to the June 2023 ATTOM Data Solutions analysis, performed by Sammamish Mortgage, the Oakland area has the second highest median down payment amount at \$239,750.<sup>4</sup> As of January 2024, 14, non-homeownership program, OHA families have over \$250,000 in assets. OHA families that are identified to be over the asset limit of \$250,000 will be connected to the FCP department to ensure residents receive additional supports to encourage a successful graduation from assistance. If eligible, families may be referred to the homeownership program.

OHA has a very small number of families that will be impacted by this activity. Of OHA residents, currently 55 residents possess over \$100,000 in assets, two of which are public housing residents, and 27 residents are approaching the limit with over \$75,000 in assets. Of all participant families, this is less than .5% of OHA's population. By raising the asset limit, only 14 OHA families, who possess over \$250,000 in assets, will be impacted.

OHA has 38 additional families with over \$250,000 in assets in the homeownership program. The regulations state that homeownership program participant assets are excluded from the HOTMA asset limitation per the net family asset definition in 5.603, for at least 10 years. OHA will exclude equity in property under the homeownership option for which a family receives assistance under 24 CFR part 982, for the length of time that the resident is enrolled in the homeownership program. OHA follows the guidance for maximum term of homeowner assistance, 24 CFR 982.634, which states that except in the case of a family that qualifies as an elderly or disabled family, other family members shall not receive homeownership assistance for more than 15 years, if the initial mortgage incurred to finance purchase of the home has a term of 20 years or longer; or 10 years in all other cases.

**ii. Describe how the proposed activity will achieve one or more of the three statutory objectives**

This activity relates to increasing self-sufficiency by increasing the likelihood for a successful transition off OHA assistance. The extension and increased limit will allow families additional time to connect with the FCP department to obtain supportive services focused on self-sufficiency and financial literacy to successfully graduate from OHA assistance in a competitive housing market.

**iii. Provide the anticipated schedule for achieving the stated objective**

As HOTMA becomes effective January 1, 2025, OHA plans offer program extensions during the FY. OHA will connect families with the FCP department before implementation to support all families with over \$250,000 to prepare for graduation.

**B. Standard HUD Metrics**

---

<sup>3</sup> <https://www.rentcafe.com/cost-of-living-calculator/us/ca/oakland/>

<sup>4</sup>

OHA's baseline performance, annual benchmark, and the data source are identified in the table below.

<i>Standard HUD Metrics</i>		
<i>SS #1: Increase in Household Income</i>		
Unit of Measurement	Baseline	Benchmark
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) = \$33,587 for 53 households with over \$100,000k in assets	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars) = \$38,960 (16% increase)
<i>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</i>		
Unit of Measurement	Baseline	Benchmark
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance prior to implementing this activity = 0 households	Number of households receiving TANF assistance after implementing this activity = 0 households
<i>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</i>		
Unit of Measurement	Baseline	Benchmark
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 = \$1,351	Expected average subsidy per household affected by this policy after implementation of the activity = \$1,351
<i>SS #7: Increase in Agency Rental Revenue</i>		
Unit of Measurement	Baseline	Benchmark
PHA rental revenue/HAP in dollars (decrease).	HAP prior to implementation of the activity (in dollars) = \$0	Expected HAP after implementation of the activity (in dollars) = \$859,056
<i>SS #8: Households Transitioned to Self Sufficiency</i>		
Unit of Measurement	Baseline	Benchmark



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 = 10 households	Number of households transitioned to self-sufficiency after implementation of this activity = 10 households
<b>SS #5 Households Assisted by Services that Increase Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 20 households

### C. Cost Implications

This activity will allow 55 OHA residents with significant assets to continue to receive assistance, while also connecting with our FCP department, for an additional 6 months, extending the runway of support in preparation for the transition to self-sufficiency. OHA will track both the number of families receiving FCP services and families who transition to self-sufficiency will be tracked internally. With over 14,000 families served, 53 families equate to less than half of 1 percent of our population being impacted by this activity.

OHA pays an average of \$1,351 in subsidy for residents who currently possess over \$100,000 in assets, totaling \$71,588 monthly. To raise the asset limit, and extend the period of assistance to 12 months, will cost approximately \$859,056 annually. Less than eight percent of the total HAP paid, \$10,991,459, will assist families with significant assets. This will decrease over time due to graduating families after the first year of implementation.

### D. Need/Justification for MTW Flexibility

Authorization for this activity is found in Attachment C, Section C.5, Section D.1.b, and Section D.3.a.



## 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 achieve. Each activity has been assigned a number based on the fiscal year in which the activity was identified and approved (e.g. 14-01 indicates that the activity was identified and approved in the FY 2014 MTW Annual Plan).

<b>Table 12: Approved MTW Activities</b>					
<b>HUD Approval Previously Granted</b>					
<b>Activity # and Fiscal Year Approved</b>	<b>Fiscal Year Implemented</b>	<b>MTW Activity Name</b>	<b>Description</b>	<b>Statutory Objective(s)</b>	<b>Authorization(s)</b>
24-01	2024	Development of Local Forms	Allow OHA to develop local versions of HUD forms to streamline processing and address MTW policies and waivers.	Reduce costs to achieve greater cost effectiveness	Attachment C, Section C. 2, 4, 9, section D.1, D. 7, and section E.
20-01	2020	Emergency Relief from Interim Re-certifications	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, Section D.1.c, and Attachment 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 B.1, D.1.a and d, D.5, Attachment D, Section D and Use of Funds
17-02	2018	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.and c.

15-01	2016	Local Area Portability Reform	Revises portability policies in the Housing Choice Voucher program to limit ports between local area jurisdictions except for special circumstances.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.g
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
14-01	2016	Alternative Re-certification 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 per OHA discretion.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
13-01	2017	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"> <li>Total Tenant Payment (TTP)</li> </ul>	Reduce costs and achieve greater cost effectiveness  Provide incentives for families with children to become	Attachment C, Section C.4, C.11 Section D.1.c Section D.2.a

			<p>calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households.</p> <ul style="list-style-type: none"> <li>• Triennial recertification schedule for senior and disabled households, biennial schedule for work-eligible households.</li> <li>• Eliminate all deductions and earned income disallowance.</li> <li>• Recent increases in income excluded in recertification.</li> <li>• Absolute minimum rent of \$25.</li> </ul>	economically self-sufficient	
12-01	2012	PBV Modifications: Eliminate Caps, Time Limits on PBV Allocations, Modify PBV contract	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 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	2017	Standardized Transfer Policy	Creates standard transfer policies in the public housing, Section 8, Section 9 and project-based	Increase housing choices	Attachment D, Use of Funds.

			assistance programs to increase housing choices for residents.		
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	Transitional Housing Programs	Permits transitional service enriched housing to fill specific unmet community needs. Used to operate the PACT Program, which provides transitional service enriched housing to families returning from prison to reunite with their children and other specialized populations.	Increase housing choices	Attachment C, Section B.1., B.4, D.1.a, b Attachment D, Section B.2
10-01	2010	Specialized Housing Programs	Increases allocation of resources to Local programs to improve outcomes and leverage MTW funds.	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	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.a, D.7

			organized by AMP or other logical grouping.		
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 D, Use of Funds (SBHAP, BB-CW, Program), Attachment C, D.1.f, D.1.a and D.3.a (LHAP Programs)
10-07	2010	Disposition Relocation	Provides counseling and relocation	Provide incentives for	Attachment D, Use of Funds



		and Counseling Services	assistance to impacted public housing residents in developments approved for disposition.	families with children to become economically self-sufficient  Increase housing choices	
10-08	2011- Re-proposed 2021	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	Alter Minimum Stay Requirement in PBV Units	Alters the 12-month minimum stay requirement for tenants in PBV units to extend or shorten the time period a tenant has to wait to move.	Increase housing choices	Attachment C, Section D.7
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	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	Allows for the allocation of PBV subsidy to	Reduce costs and achieve greater cost	Attachment C, Section D.7.a

		Competitive Process	developments owned directly or indirectly, through an affiliated partner, by OHA without using a competitive process.	effectiveness  Increase housing choices	
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

OHA is currently implementing the following activities:

Table 13 provides a list of all approved activities that will be implemented during FY 2025. The table includes the year the activity was implemented and the primary statutory objective(s) the activity is intended to achieve. Each activity has been assigned a number based on the fiscal year in which the activity was identified and approved (e.g. 14-01 indicates that the activity was identified and approved in the FY 2014 MTW Annual Plan).

Table 13: Implemented Activities					
Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
24-01	2024	Development of Local Forms	Allow OHA to develop local versions of HUD forms to streamline processing and address MTW policies and waivers.	Reduce costs to achieve greater cost effectiveness	Attachment C, Section C. 2, 4, 9, section D.1, D. 7, and section E.
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 B.1, D.1.a and d, D.5, Attachment D, Section D and Use of Funds
15-01	2016	Local Area Portability Reform	Revises portability policies in the Housing Choice Voucher program	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.g

			to limit ports between local area jurisdictions except for special circumstances.		
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
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 per OHA discretion.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
12-01	2012	PBV Modifications: Eliminate Caps, 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-	Increase housing choices	Attachment C, Section D.1.e, Section D.7

		Modify PBV contract	based in a development, and the time limit to add additional PBV units to existing HAP contracts.		
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	2017	Standardized Transfer Policy	Creates standard transfer policies in the public housing, Section 8, Section 9 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	Transitional Housing Programs	Permits transitional service enriched housing to fill specific unmet community needs. Used to operate the PACT Program, which provides	Increase housing choices	Attachment C, Section B.4, D.1.a and b, Attachment D, Section B.2

			transitional service enriched housing to families returning from prison to reunite with their children and other special populations.		
10-01	2010	Specialized Housing Programs	Increase allocation of resources to the Local programs to improve outcomes and leverage MTW funds.	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	Increase housing choices	Attachment C, Section D.7

			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.		
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.and D.3.a (LHAP Programs), Attachment D, Use of Funds (SBHAP, BB-CW Programs)
10-09	2019	Alter Minimum Stay Requirement in PBV Units	Alters the 12-month minimum stay requirement for tenants in PBV units to extend or shorten the time period a tenant has to wait to move.	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	Reduce costs and achieve	Attachment C, Section C.1

			sites, HOPE IV sites, and developments with PBV allocations.	greater cost effectiveness	
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 #24-01: Development of Local Forms**

*Plan Year Approved: 2024*

*Plan Year Implemented: 2024*

*Plan Year Amended: None*

#### *Description/Update*

Under this initiative, OHA has developed local versions of forms, as needed, to address MTW policies, streamline processing, utilize “plain language”, and address local housing market features. OHA plans to develop local versions of the Project-Based Voucher (PBV) Housing Assistance Payment (HAP) contracts, the PBV Agreement to enter into a HAP contract, the Family Self-Sufficiency (FSS) Contract of Participation, and the Utility Allowance Schedule. OHA has already obtained HUD approval in previous years for modified versions of the following forms: the PBV Tenancy Addendum, the Request for Tenancy Approval, the Statement of Family Responsibility, the Housing Choice Voucher (HCV) HAP Contract, and the Authorization Release Form/ Privacy Act Notice. Consolidating the modified forms into one activity will save the agency time and money. Any changes to the HAP form will be submitted to HUD for review and will include language noting that funding for the contract is subject to the availability of appropriations



and other required provisions identified by HUD. Development of any local form must meet all applicable HUD requirements.

This activity addresses the statutory objective to reduce costs and achieve greater cost effectiveness in Federal expenditures by simplifying forms that are used by program staff and participants.

*Planned Non-Significant Changes:* OHA is requesting approval for one modified form, attached in Appendix J, to apply our MTW activities to form 52530 A, Part 2 of HAP Contract for New Construction or Rehabilitation.

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

*Planned Significant Changes:* OHA has no significant changes planned for this activity.

**Modified Forms:**

Modified Form #	Modified Form Name	Why it was Modified	Approval Status
52530 A (Part 2)	Part 2 of HAP Contract (New Construction or Rehabilitation)	MTW: OHA revised Section 11 (Family Right to Move) to state that a family may request tenant-based assistance after two years of tenancy.	Requesting approval
52530-A (Part 1)	PBV HAP Contract (New Construction or Rehabilitation)	Modified to include Activities 12-01 and 06-01- added the ability to establish site-based wait lists and modified the Income-Mixing Requirements to remove PBV Caps. Also adds new exhibits.	Previously approved
52530-B (Part 1)	PBV HAP Contract (Existing Housing)	Modified to include Activities 12-01 and 06-01- added the ability to establish site-based wait lists and modified the Income-Mixing Requirements to remove PBV Caps.	Previously approved
52531-A	PBV AHAP (Part1)	Modified to include new exhibits.	Previously approved
52650	Family Self Sufficiency Contract of Participation	Modifies escrow determinations to include Table A, from Activity 10-08.	Previously approved
52667	Utility Allowance Schedule	Modified to be consistent with Activity 15-02. a) Changed name to "Section 8 Utility and Appliance Allowances for Tenant- Paid Utilities." b) Modified fuel types to match HUD Utility Schedule Model c) As a reminder, PHA is not required to have an allowance for each of the fuel types, only those that are regionally appropriate.	Previously approved
52517	HCV/PBV RTA	Modified form to a) Change the structure types to match the 50058,	Previously approved

		b) Modified the fuel types to match the utility schedule, c) Utility responsibility chart updated – only one column to complete per utility, d) Added section for Agent information to be included.	
52641-Part A, B, & C	HCV HAP Contract	In Part B added MTW revision to include OHA revised section 4(b)(4): Term of the Hap Contract to state that the HAP contract terminates automatically 24 months after the last HAP Payment to the owner. (Activity 10-01)  In Part C a signature line was added.	Previously approved
52530-C	Tenancy Addendum	MTW: OHA revised Section 11 (Family Right to Move) to state that a family may request tenant-based assistance after two years of tenancy or an amount determined by OHA.	Previously approved
52578-B	Statement of Family Responsibility	MTW OHA revised section 5 A and B regarding “Family Right to Move” to state that a family may request tenant-based voucher assistance after two years of tenancy or an amount determined by OHA.	Previously approved
9886	Authorization Release Form/ Privacy Act Notice	OHA extended the expiration from 15 months to 42 months to accommodate the biennial and triennial recertification cycles. (Activity 10-02)	Previously approved

<b>Standard HUD Metrics</b>		
<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$46.94 (Staff Salary) * .5 hours = \$23.47 cost per form	Cost of task after implementation of the activity = \$46.94 (Staff Salary) * .25 hours = \$11.73 cost per form = \$11.73 * 100 hours = \$1,173
<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = .5 hours * households = 100 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = .25 hours * households = 50 hours

## MTW Activity #17-01: Owner Incentives Program

*Plan Year Approved: 2017*

*Plan Year Implemented: 2017*

*Plan Year Amended: 2023*

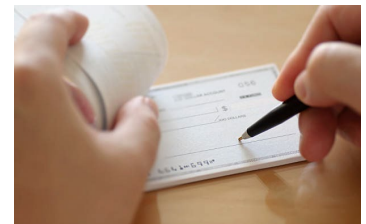
### Description/Update

The HCV program has been impacted by a dramatically escalating rental market and very limited inventory which has led to much longer search times than usual and multiple voucher extensions being granted for families searching for housing. According to Zillow, market rents increased by 21.6% in Oakland in 2016. In 2015, OHA saw hundreds of owners choose to leave the program or remove units by not re-leasing to HCV participants resulting in the loss of approximately 824 units of affordable housing. In response to these market conditions, OHA is implementing 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 six months of contract cancellation.
- 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 OHA will allow owners up to 120 days to find a tenant once an inspection has been passed. No additional costs are anticipated.
- 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. No additional costs are anticipated. MTW flexibility is not required to implement this component and it is included for consistency of grouping like programs.

- Leasing Incentive Payment – Provides an owner \$1,000 to execute a new lease with a new HCV participant.
- Capital Improvement Payment – Offer owners that have failed a second inspection and are entering abatement a payment of up to \$2,250 to address approved 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. These funds do not need to be repaid.
- 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.
- Exception Payment Standards Hubs - OHA may 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 meet the requirements of the Uniform Federal Accessibility Standard (UFAS).

Designed to broaden the market of available units to untapped areas of the city, OHA anticipates that this activity will maintain or increase the number of owners participating in the HCV program and anticipates the number of units available for families to rent will increase as result of new landlord participation and the capital improvement payment option. Additional impacts will be increased leasing success rates for vouchers issued, increased overall voucher utilization rate and decreased voucher extensions, due to more units being made available.

*Planned Non-Significant Changes:* OHA intends to add some additional incentives and expand existing incentives to other voucher types. New incentives to be piloted are:

- Landlord Referral Bonus – existing owners will be paid \$250 to refer a new owner to the program if the referral signs a HAP contract.
- Security Deposit for up to one month's rent – applicable to all voucher programs.
- Application Fee – a payment of up to \$100 per household for all voucher programs to cover application fees using gift cards to reduce wait times.

- Mediation Benefit - exploring contracting with one or more mediation organizations to offer mediation services, with in-person and virtual options. OHA intends to use existing on-site spaces as neutral in-person mediation locations for owners and tenants in conflict. This resource will be provided with the intention to increase owner retention and satisfaction. OHA will pay for up to two sessions per active HAP contract, once per year.
- Welcome Kit expansion- OHA is planning to expand the Welcome Kits to more families during FY 2025.

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

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

<b>Standard OHA Metrics</b>		
<b>Number of Landlords Recruited or Maintained by Payment Incentive</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of new or existing landlords where a bonus payment was an incentive to enroll a unit in the HCV program.	Average number of new or existing landlords where a bonus payment was an incentive to enroll a unit in the HCV program = 0	Average number of new or existing landlords where a bonus payment was an incentive to enroll a unit in the HCV program = 247 (247% increase)

<b>Standard HUD Metrics</b>		
<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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) * 56 = \$258
<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task prior to	

Pre-qualifying inspections	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 * 56 households = 5.6 hours
<b>CE #3: Decrease in Error Rate of Task Execution</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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)

#### **MTW Activity #15-01: Local Area Portability Reform**

*Plan Year Approved:* 2015

*Plan Year Implemented:* 2015

*Plan Year Amended:* 2015

*Description/Update:* A local area portability policy that limits elective moves between 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. When housing authorities in neighboring counties administer OHA vouchers this causes a loss in 80 percent (80%) of the administrative fee. While the objective of the HCV program is to provide increased housing options for families, OHA finds that many households exercise the option to move with their vouchers to neighboring housing authorities, especially those without MTW programs or with higher payment standards. Given the prevalence of local area ports, the areas of concentration of port requests, and their negative impact on program administration and self-sufficiency goals, OHA limits ports between jurisdictions in all nine counties and initially implemented the policy in five counties. The policy will be expanded to include additional jurisdictions as needed and will be used to control the number of voucher holders searching so that an already tight market is not flooded, potentially causing families to lose the opportunity for subsidized housing as their search timeline expires.

OHA anticipates that some households will need to move out of Oakland for special needs. This new portability policy will allow 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 unit and at least 20 hours per week minimum wage applicable in the state
- Situations covered underneath the Violence Against Women Act (VAWA)
- Participants porting 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 ports where the receiving Public Housing Authority (PHA) absorbs the voucher
- Ports 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 allows current households that have ported prior to implementation of this activity to remain in the current jurisdiction. However, this policy does apply to any port-out households that requested to port to another jurisdiction after FY 2016.

Outgoing portability will be minimized to jurisdictions in five of the nine counties, which will lead to administrative efficiencies and cost savings from less frequent processing of burdensome ports-outs. Evaluation metrics have been developed to measure the impacts of minimizing local area ports. OHA will track the number of port requests received from participants. If the data demonstrates that OHA residents request to port to other local jurisdictions, OHA will exercise its authority and expand the activity to include jurisdictions in the remaining four Bay Area counties. OHA will provide a minimum 30-day notification of the new policy to all households.

OHA anticipates that this activity will lead to a reduction in administrative time spent processing local area ports. This policy will reduce the drain of vouchers out of OHA's portfolio and thus will reduce administration costs for both OHA and the receiving housing authorities. The activity also may result in stabilizing project based voucher properties and the surrounding neighborhoods by reducing the turnover rates and creating longer term tenants. OHA anticipates being able to better control the number of voucher holders searching so as not to oversaturate a tight market with



families that are searching for housing in low inventory conditions. OHA may elect to allow ports to counties that are absorbing depending on voucher availability.

OHA also anticipates a decrease in the cost of wait list management by limiting the number of applicants that apply and receive assistance from OHA and port after they complete the one-year residency requirement or those applicants that are processed but do not ever lease up.

OHA will measure the 35-mile limit for verifiable employment from the City of Oakland from the resident's unit and not the City of Oakland border for consistency and clarity. OHA may elect to allow ports to neighboring counties that are currently restricted if those counties are absorbing to regulate voucher availability. OHA will have the option to end the absorption of port-ins based upon market conditions.

*Planned Non-Significant Changes:* OHA does not have any planned non-significant changes for this activity.

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

*Planned Significant Changes:* OHA has no significant changes planned for this activity.

<b>Standard HUD Metrics</b>		
<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 * 42 = \$25,207 (based on 61 rejected requests)
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) * 58 port-out requests = \$2,723 (94% reduction)
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 = \$25,207+\$2,723= \$27,930 (72% reduction)
<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

Total time to complete the task in staff hours (decrease). Local Port 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 * 358 requests = 537 hours (49% reduction)
Administering Local Ports	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 * 58 requests = 58 hours (94% reduction)
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 = 537 + 58 = 595 hours (72% reduction)

#### MTW Activity #15-02: Modified Utility Allowance Policy

*Plan Year Approved:* 2015

*Plan Year Implemented:* 2015

*Plan Year Amended:* None

*Description/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 administrative costs for providing a tenant utility allowance and/or a reimbursement payment will decrease, causing tenants to exercise conservation methods or select more energy/water efficient homes. The activity was implemented in the tenant-based portfolio. Implementation within the public housing portfolio is currently on hold as a phased approach is developed.

*Planned Non-Significant Changes:* OHA does not anticipate any changes or modifications to this activity.

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

*Planned Significant Changes:* OHA does not plan to make any significant changes to this activity.

<b>Standard HUD Metrics</b>		
<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total 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 = \$1,255,115 (88% reduction)
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)
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)
Total cost of task in dollars.	Total cost of task prior to implementation of the activity = \$11,188,104 + \$6,699 \$220,968 = \$11,415,771	Total expected cost of task after implementation of the activity = \$1,255,115 + \$0 = \$1,255,115 (89% reduction)
<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 households = 145 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 0 hours * 2,909 households = 0 hours
<b>CE #3: Decrease in Error Rate of Task Execution</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average error rate in completing a task as a percentage (decrease).	Average error rate prior to implementation = 10%	Expected error rate after implementation = <.0001%
<b>CE #5: Increase in Agency Rental Revenue</b>		

Unit of Measurement	Baseline	Benchmark
Rental revenue/total tenant payment in dollars (increase).  Housing Choice Voucher	Rental revenue prior to implementation of the activity (in dollars) = \$4,343,040	Expected rental revenue after implementation of the activity (in dollars) = \$10,991,459 (153% increase)
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)
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) = \$13,213,919 (101% increase)

#### **MTW Activity #14-01: Alternative Recertification Schedules**

*Plan Year Approved:* 2014

*Plan Year Implemented:* 2014

*Plan Year Amended:* 2020

*Description/Update:* Regulations require annual recertification and verification to determine that a household meets program requirements. 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 voucher 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 traditional MTW programs. 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. The offer of flat versus income rent will be made based on the recertification schedule for each public housing household. This activity also incorporates a customized OHA form for the authorization to release information to replace HUD form #9886. OHA will use the activity for RAD voucher holders.

OHA and participant families have already and will continue to experience time savings due to fewer re-examinations and with the proposed amendment, OHA will save additional staff time by eliminating the need to process and update consent forms between scheduled reexaminations and manage the cumbersome process of beginning program termination for non-receipt of consent forms. 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 reviewed the activity and determined that most households would benefit from the biennial recertification schedule and would also result in a cost savings in staff time. OHA elected not to implement the Cost of Living Adjustments (COLA) for the Triennial households as described in the FY 2015 plan. OHA plans to apply this activity to RAD voucher holders.

During declared disaster periods OHA may allow self-certification for all interim reexaminations (form HUD 50058-MTW action type three), eliminating the need for verification by staff who may be limited or inundated with requests during an emergency. This allows participants quick relief due to decreases in income or changes in circumstances as a result of the declared disaster. The Executive Director will determine the duration of the period for self-certification and staff will inform participants that after the short-term emergency period is over all verification as well as a limited requirement to report subsequent income increases will resume and will be expedited.

OHA plans to exclude income reporting requirements for additional income due to participation in pilot programs designed to test the concept of guaranteed income. As OHA explores the possibility of offering participants a cash assistance subsidy, instead of HAP, OHA will identify how the cash assistance will be classified. It is expected that these programs will be relatively short term (1-2 years) in duration and OHA expects to prioritize re-certifications for participants in these programs to occur at the beginning of their pilot program participation.

*Planned Non-Significant Changes:* OHA has no planned non-significant changes.

*Planned Changes to Metrics/Data Collection:* OHA has no planned change to metrics or data collection for this activity.

*Planned Significant Changes:* OHA has no significant changes planned for this activity.

<b>Standard HUD Metrics</b>		
<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars) = \$111,940	Expected cost of task after implementation of the activity = \$54,507 (51% reduction)
Triennial HCV Reexam Calculation		

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) = \$5,748 (86% reduction)
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 = \$124,849 (15% reduction)
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)
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) = \$54,507 + \$5,748 + \$124,849 + \$14,625 = \$199,729 (39% reduction)
<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total time to complete the task in staff hours (decrease).  Triennial HCV <i>Reexam</i> 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) = 1,043 hours (61% reduction)
Total time to complete the task in staff hours (decrease).  Triennial Public Housing <i>Reexam</i> 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) = 110 hours (93% reduction)
Total time to complete the task in staff hours (decrease).  Biennial HCV <i>Reexam</i> 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) = 2,389 hours (32% reduction)
Total time to complete the task in staff hours (decrease).  Biennial Public Housing <i>Reexam</i> 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)
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 (in hours) = 9,028 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 1,043 + 110 + 2,389 + 585= 4,127 hours (54% reduction)
<b>CE #5: Increase in Agency Rental Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Rental revenue in dollars (increase).  Housing Choice Voucher and Public Housing	Rental revenue prior to implementation of the activity (in dollars) = \$3,863,650	Expected rental revenue after implementation of the activity (in dollars) = \$46,364,748
<b>SS #1: Increase in Household Income</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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: \$23,040 (111% increase) HCV: \$27,388 (90% increase)
<b>SS #3: Increase in Positive Outcomes in Employment Status</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
<b>Report the following information separately for each category:</b>	OHA's business system does not allow information to be tracked relative to these metrics.	
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.		
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)		
Unit of Measurement	Baseline	Benchmark
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
SS #8: Households Transitioned to Self Sufficiency		
Unit of Measurement	Baseline	Benchmark
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)	Number of households transitioned to self-sufficiency after implementation of this activity =10% of eligible households

#### **MTW Activity #12-01: Eliminate Caps and Time Limits on PBV Allocations**

*Plan Year Approved: 2012*

*Plan Year Implemented: 2012*

*Plan Year Amended: 2021*

**Description/Update:** Eliminate caps and time limits on project-based voucher (PBV) allocations. This activity was created in FY2010 when existing regulations limited Public Housing Authorities (PHAs) 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. Additionally, PHAs were limited to project-basing up to 25 percent (25%) of units in a single development. 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.

Existing regulations state that a HAP contract may be amended during the three-year period immediately following the execution date of the HAP contract to add additional PBV contract units in the same project. 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 further expanded in the FY 2012 Plan to eliminate caps on PBV allocations in all areas.

This activity extends the long-term affordability of housing units using PBV assistance by allowing OHA to award projects to developers that will make efforts to leverage the PBV funding to preserve or create additional affordable housing opportunities for Oakland residents.

OHA reserves the option to issue new PBV awards during the upcoming fiscal year. OHA is dependent on developers submitting allocation requests and will award PBV's based on need and funding availability. In FY 2025, OHA may participate in City of Oakland's New Construction of Multifamily Rental Affordable Housing Notice of Funding Availability (NOFA) as the basis for PBV awards.

**Planned Non-Significant Changes:** OHA does not have any non-significant changes to this activity in FY 2025.

**Planned Changes to Metrics/Data Collection:** There are no changes to the metrics included in the Standard HUD Metrics table below. Performance measures for this activity reflect the unknown status of new awards.

**Planned Significant Changes:** OHA has no significant changes planned for this activity in FY 2025.

<b>Standard HUD Metrics</b>		
<b>HC #4: Displacement Prevention</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households at or below 80% AMI that would lose		Expected households losing assistance/moving after

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)	implementation of the activity = Zero (0)
<b>Standard OHA Metrics</b>		
<b>Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 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 number of PBV units awarded above the greater of 25 units or 25% of the total units in a project = 0 units Expected number of PBV units awarded above 20% of total units in voucher program = 91 units
<b>Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 91 units
<b>Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 91 households
<b>Households Assisted by Services that Increase Housing Choice</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

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 = 0 households
--	---	--

### MTW Activity #11-01: PBV Occupancy Standards

*Plan Year Approved:* 2011

*Plan Year Implemented:* 2011

*Plan Year Amended:* None

*Description/Update:* Developing PBV occupancy standards to be consistent with the 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. This activity will make consistent occupancy standards for all units in a development regardless of source of subsidy, thereby, increasing housing options for households assisted with PBVs. This activity is largely dependent upon participant families requesting changes to household composition and its utilization is affected by these requests. OHA may use this activity to admit homeless families into units that are larger than the occupancy standard required for the family size to ameliorate the homeless crisis in Oakland. OHA would offer subsidy consistent with unit size, instead of family size to enable eligibility for families who would otherwise not meet the occupancy standards for the unit. OHA plans to use this activity for RAD voucher holders.

OHA may allow families to occupy units for which their family composition may not meet the occupancy standard. Family composition is a dynamic characteristic that changes over time leading to ever-changing waitlists that do not align with static housing inventory. During any crisis, OHA implements a housing first prioritization, removing barriers to housing, like occupancy standards, for otherwise eligible homeless families.

*Planned Non-Significant Changes:* OHA has no non-significant changes to propose for this activity in FY 2025.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection included in the Standard HUD Metrics table and the local OHA metrics table below.

*Planned Significant Changes:* OHA has no planned significant changes for this activity in FY 2025.

### Standard HUD Metrics

<b>HC #4: Displacement Prevention</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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.	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
<b>HC #5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 doesn't apply because the households impacted by this activity are in place.
<b>Standard OHA Metrics</b>		
<b>Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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
<b>Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a	Housing units preserved prior to implementation of the activity = Zero (0) units	Expected housing units preserved after implementation of the activity = 2 units

specific type of household, give that type in this box.		
<b>Households Assisted by Services that Increase Housing Choice</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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

### **MTW Activity #11-02: Standardize Transfer Policy**

*Plan Year Approved:* 2011

*Plan Year Implemented:* 2011

*Plan Year Amended:* N/A

*Description/Update:* Adopt a policy to allow residents to transfer between Section 8 and Section 9 programs and MTW 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 or longer 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 ratio 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. Typically, the ratio is five to one to ensure OHA meets the needs of residents who may not already be housed. 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 may 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. For FY 2025, OHA plans to limit transfers from local, non-traditional programs into the HCV program.

Families searching for housing often reach the limit of search times and even with time extensions granted, families are unable to find suitable housing. OHA may use this standardized transfer policy to increase housing choice by offering eligible families that may lose their opportunity for

subsidy, vacant units in PBV assisted units or public housing. This activity will also allow OHA to increase housing choice for those families that request transfers due to emergency situations, reasonable accommodation or compliance with occupancy standards, where units may not be available within the same program type but are available within the OHA portfolio. OHA may use this activity to manage compliance with OHA occupancy standards as family size and composition changes may cause families to be housed in units that are no longer appropriate based on occupancy standard guidelines, resulting in a more efficient utilization of Federal resources.

*Planned Non-Significant Changes:* No non-significant changes are planned.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics, baselines or data collection in the Standard HUD Metrics and the local OHA metrics table below.

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

<b>Standard HUD Metrics</b>		
<b>HC #3: Decrease in Wait List Time</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average applicant time on waitlist in months (decrease)	Average applicant time on waitlist prior to implementation of the activity (in months) (OHA is currently unable to track this metric due to Business System Limitations)	Expected applicant time on waitlist after implementation of the activity (in months) = 8
<b>HC #4: Displacement Prevention</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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. (HCV)	Households losing assistance prior to implementation of activity = 25	Expected households losing assistance after implementation of activity = 0
<b>HC #5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households able to move to a better unit and/or neighborhood	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation



of opportunity as a result of the activity (increase).	of the activity = Zero (0) households	of the activity = number of inter-program transfers that occur as result (emergencies, RAs) = 14  SBHAP=0
<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 14
<b>CE #5: Increase in Agency Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = \$46,364,749

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

*Plan Year Approved:* 2011

*Plan Year Implemented:* 2018

*Plan Year Amended:* N/A

*Description/Update:* Develop a 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 operate SRO housing given the high need for housing in Oakland. Due to high market rate rents and a very low inventory of affordable housing units, hard to house populations are being adversely affected as developers opt to convert SRO housing to other uses. OHA reserves the right to issue another Request for Qualifications (RFQ) based on need, City of Oakland priorities and funding availability. In FY 2025 OHA plans to continue to provide housing assistance to 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.

### 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 submitted an application with project sponsors Danco Communities and Operation Dignity.

The program funds a capitalized subsidy reserve in an amount up to \$4,572,041 for the Homekey project, Coliseum Way 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.

### Coliseum Way (Homekey)

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. 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, included in 10-06.

### Project Evaluation

Staff reviewed all Homekey proposals applying a risk-based approach to underwriting in order to ensure long-term financial stability. A primary underwriting objective was to create positive net operating income which is sufficient to sustain the project through uncertainty in the long term over 15 years. Our assessment included, but was not limited to, long-term maintenance needs, on site resident services, and property management.

On January 11, 2022, the Authority's project team met with Danco and Operation Dignity. Coliseum Way was evaluated against the Authority's threshold funding criteria and priorities established by the Board of Commissioners. The project met all criteria except the Authority's standard of including full kitchens and baths in all units.

- Population served is 30% AMI and below
- Wrap around services are available for the duration of the Authority's investment
- Integration into the surrounding community.
- Safety and security plan
- Units will meet the Authority's standard of including full kitchens and baths
- On site property management and resident support services
- Ability to meet the Homekey timeline requirements

Other evaluation criteria and considerations the team applied were:

- Long-term stability of the project
- Overall project needs
- Ease of operations and minimizing administrative burdens on staff
- Alignment with The Authority's mission

OHA's conditional award is contingent on the project receiving an award of HomeKey funding from the State. It is also conditional based upon the project's receipt of clearances and authorizations to use federal funds.

#### Housing Quality Standards

The project must meet Housing Quality Standards prior to execution of the capitalized reserve agreement and regularly (at least biennially) after the initial disbursement of capitalized subsidy reserves.

The project opening date is projected to be Dec. 2024.

OHA may add additional projects under Homekey as new proposals are submitted and funding awards are made early summer of 2023.

*Planned Non-Significant Changes:* No non-significant changes planned for this activity.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table and the local OHA metrics table below.

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

#### **Standard HUD Metrics**

<b>HC #4: Displacement Prevention</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 (0)
<b>HC#1: Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = <b>181 households</b>
<b>HC#2: Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 181 households
<b>HC#5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 181 households
<b>HC#7: Households Assisted by Services that Increase Housing Choice</b>		

Unit of Measurement	Baseline	Benchmark
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 = 181 households

### MTW Activity #11-05: Transitional Housing Program

*Plan Year Approved:* 2011

*Plan Year Implemented:* 2011

*Plan Year Amended:* N/A

*Description/Update:* Develop sub-programs 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 uses partnerships with the Alameda County Sheriff's Office (ACSO) and other program providers, to facilitate the development of local, non-traditional housing programs like the Maximizing Opportunities for Mothers to Succeed (MOMS) initiative.

This program offers 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. Currently, ACSO refers MOMS and DADS program participants to OHA for housing. OHA has implemented the Parents and Children Together (PACT) program to provide transitional service enriched housing to both populations and families referred by other vetted service providers. In addition to the housing subsidy, the PACT program offers 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.

PACT participants that are referred through ASCO, apply and are screened while in custody at the Santa Rita jail and once accepted they complete a needs assessment and intake processing. Participants complete an 8-week gender specific educational component while in custody and create an Individual Action Plan (IAP) tailored to meet the needs of each participant. Once housed at the PACT site, case managers work with participants to complete their IAP using various supportive services for the participants and their children.

The Alameda County Sherriff's Office (ACSO) provides MOMs and DADs applicants to OHA through direct referral. Following ACSO program standards, ACSO staff selects and refers to OHA those ACSO MOMs and DADs candidates who qualify for minimally supervised transitional housing after completion of a 6-8 week multi-faceted program while in custody including an Individual Case Management Plan (ICM). ACSO referred "applicants" are then screened by OHA Eligibility according to HUD program requirements. ACSO MOMs and DADs applicants who meet HUD program requirements are offered a unit at the 18 month OHA PACT Housing program site. Those selected for the OHA Housing Component remain in the ACSO Transitional Case Management Program for 18 months, during which they must comply with the PBV Housing Lease or defined PACT program participant requirements as well as their ICM. OHA plans to continue to strive to fill the 18-unit site designated for the program, but this is dependent upon qualified referrals from the ASCO.



OHA, along with the primary program partners Alameda County Sheriff's Office (ACSO) and the Alameda County Behavioral Health Care Services (ACBHS) Department will continue to facilitate a strategic planning process resulting in several program improvements. Planned additions to the current program structure include 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.

OHA plans to explore partnerships with additional providers that specialize in re-entry and other hard to house populations to provide direct referrals and supportive services into the existing PACT program. The program design will remain the same in terms of requirements and length of stay in transitional housing. Additionally, OHA will offer PACT program graduates housing within Section 8 or Section 9 housing depending upon voucher and unit availability.

*Planned Non-Significant Changes:* OHA has no non-significant changes for FY 2025.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table.

*Planned Significant Changes:* OHA is reevaluating this activity. As a new Sheriff was elected in 2022, it has been a challenge to receive referrals for this program, and we anticipate a reduction in the number of families served during the plan year. During FY 2025, OHA will continue to evaluate feasibility of PACT, and looking to find new ways to continue the partnership with the ACSO and explore expansion to new partnerships.

<b>Standard HUD Metrics PACT Program</b>		
<b>HC #5: Increase in Resident Mobility</b>		

Unit of Measurement	Baseline	Benchmark
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 =0 households
<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>		
Unit of Measurement	Baseline	Benchmark
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 = 0 households
<b>Standard OHA Metrics</b>		
<b>Additional Units of Housing Made Available</b>		
Unit of Measurement	Baseline	Benchmark
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 = 0 households
<b>Increase in Household Income</b>		
Unit of Measurement	Baseline	Benchmark
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households prior to implementation of this activity = Zero (0) dollars	Average earned income of households after implementation of this activity = \$0
<b>Increase in Household Savings</b>		
Unit of Measurement	Baseline	Benchmark



Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average amount of savings/escrow of households prior to implementation of this policy = Zero (0) dollars	Average amount of savings/escrow of households after implementation of this policy = \$0 dollars  OHA will also link families to Family and Community Partnerships to help offer assistance with establishing a savings plan or enrolling in the FSS program.
Increase in Positive Outcomes in Employment Status		
Unit of Measurement	Baseline	Benchmark
Report the following information separately for each category:		
1. Employed Full- Time	1) 0 households	1) 0 households
2. Employed Part- Time	2) 0 households	2) 0 household
3. Enrolled in an Educational Program	3) Unknown	3) 0 households
4. Enrolled in Job Training Program	4) Unknown	4) 0 household
5. Unemployed	5) 8 households	5) 0 households
6. Other-Drug Rehab Counseling	6) Unknown	6) 0 households
Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Unknown	
Households Removed from Temporary Assistance for Needy Families (TANF)		
Unit of Measurement	Baseline	Benchmark
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF prior to implementation of this activity = 8 households	Number of households receiving TANF after implementation of this activity= 0 households
Households Assisted by Services that Increase Self Sufficiency		
Unit of Measurement	Baseline	Benchmark

Number of households receiving services aimed to increase self-sufficiency (increase).	Number of households receiving services aimed to increase self-sufficiency prior to implementation = Zero (0) households	Number of households receiving services aimed to increase self-sufficiency after implementation = 0 household
<b>Households Transitioned to Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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)	Number of households transitioned to self-sufficiency after implementation of this activity = 0 household will graduate from program

### **Building Bridges – Shared and Transitional Housing**

The Building Bridges (BB) initiative is comprised of several local programs. The BB-Shared and Transitional local programs model target housing resources, alongside supportive services funding, toward a household to dramatically improve outcomes through County, City and housing authority systems alignment. In FY 2025, partners such as Operation Dignity, the City of Oakland (Families in Transition & Matilda Cleveland) and Henry Robinson in addition to those listed below will offer Shared/Transitional housing to several hard to house populations.



#### **Operation Dignity (SRO-Transitional)**

House of Dignity (585 8<sup>th</sup> St. in Oakland) provides shelter and transitional housing to male veterans who are homeless. They offer 30 beds of transitional housing and 15 of shelter, as well as 9 rooms dedicated to permanent housing (including HUD-VASH). This program offers 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. The operation began serving families through Building Bridges in November 2017. As referrals have increased, OHA expects to achieve full capacity during FY 2025.

#### **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 are referred to FIT through a Coordinated Entry process via the Family Front Door. Families enrolled in the project are able to receive various support services such as financial literacy, life skills and career development, designed to help them achieve self-sufficiency and get permanent housing in the least possible time. Families receive access to case management, employment support services, and access to mental health and housing search assistance. Some of the specific goals of the program include the following:

1. 80% of families exiting the program will transition to permanent housing.
2. 95% of all program participants will exit to a known destination.
3. 80% of the program participants will 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 will 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 will have maintained or increased their income during the program year.
6. 100% of all families who have been in the program for at least 60 days will have obtained or maintained non-cash mainstream benefits.

FIT started serving families through Building Bridges in March 2018.

#### **City of Oakland – Matilda Cleveland (Transitional Housing)**

The Matilda Cleveland (MC) Program is a 14-unit project for homeless families that is designed to assist them with transitioning to permanent housing. All families are referred to MC through a Coordinated Entry process via the Family Front Door. Families enrolled in the project are able to receive various support services designed to help them achieve self-sufficiency and get permanent housing in the least possible time. Families receive access to case management, employment support services and access to mental health and housing search assistance. Some of the specific goals of the project include the following:

- 80% of the MC THP families will exit to permanent housing.
- 50% of the MC THP families will have length of stays of less than or equal to six months.
- 95% of the MC THP families will exit to known destinations.
- Of clients who are eligible for but not yet enrolled in mainstream benefits 90% will have started the enrollment process within 30 days of program entry

- 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 will have obtained or maintained non-cash mainstream benefits.
- 75% of clients who are in the program at the end of the contract period or who have exited during the contract period will have maintained or increased their income during the program year.

MC joined the Building Bridges program in March 2018.

### **Peter Babcock House (Shared Housing)**

Peter Babcock House assists 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 meets weekly with each resident to assess any needs, check on progress toward goals, and provides resources to address any issues. Peter Babcock House has funding from HUDs Continuum of Care (CoC) grant and as a part of the CoC grant Satellite Affordable Housing (SAHA) has begun leasing vacancies through the Alameda County Coordinated Entry System (CES). Peter Babcock House began serving families through Building Bridges in April 2018. OHA anticipates full occupancy, as this program has maintained occupancy since inception.

### **St. Mary Presentation House (Shared Housing)**

St. Mary's offers homeless seniors the experience and support of structure congregate housing to prepare for independent living providing 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 currently experiencing homelessness. Program objectives are:

1. Provide quality, consistent case management services that include weekly meetings between Case Manager and participant to address ongoing needs, provide necessary support and check in on goals.
2. Develop life skills and regular habits such as grocery shopping, paying rent, establishing savings, cleaning, and tending to hygiene needs to set foundation of self-care practices and responsibility for independent living.
3. Practice building communication skills through weekly community meetings to discuss house needs, conflicts and appreciations.
4. Create access to housing resources by attending a housing clinic to access applications and apply to affordable, independent living opportunities.

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

### **St. Mary Closer to Home (Shared Housing)**

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

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

*Planned Non-Significant Changes:* This activity remains ongoing. OHA plans to work with local government agencies and other non-profits to explore using unused facilities to provide temporary housing assistance to homeless (OUSD) students and their families. The program will provide shared and transitional housing using a shallow housing subsidy and families may be able to transition into a project-based voucher unit after stabilization depending on voucher availability.

### **UCSF Benioff Children's Hospital**

OHA is exploring a partnership with UCSF Benioff Children's Hospital aimed at addressing the critical issue of housing insecurity for families grappling with serious or chronic medical conditions. OHA will provide families with furnished housing for up to 24 months. To enhance the comprehensive support system, UCSF Benioff Children's Hospital will contribute wrap-around services, including dedicated case management and assistance in transitioning to permanent housing.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods.

*Planned Significant Changes:* There are no significant changes for this activity.

<b>Standard HUD Metrics</b>		
<b>HC #5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 39 households
<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

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 = 39 households
<b><i>Additional Units of Housing Made Available</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 39 households
<b><i>Increase in Household Income</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households prior to implementation of this activity = Zero (0) dollars	Average earned income of households after implementation of this activity = \$1,432
<b><i>Increase in Household Savings</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average amount of savings/escrow of households prior to implementation of this policy = Zero (0) dollars	Average amount of savings/escrow of households after implementation of this policy = Zero (\$0) dollars OHA is exploring with partners how to access this information. It currently is unavailable.
<b><i>Increase in Positive Outcomes in Employment Status</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Report the following information separately for each category:	1) 0 households	1) 4 households

1. Employed Full-Time	2) 0 households 3) 0 households 4) 0 households 5) 8 households 6) 0 households	2) 5 households 3) 0 households 4) 0 household 5) 29 households 6) 5 households
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	
Households Removed from Temporary Assistance for Needy Families (TANF)		
Unit of Measurement	Baseline	Benchmark
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF prior to implementation of this activity = 0 households	Number of households receiving TANF after implementation of this activity= 0 households
Households Assisted by Services that Increase Self Sufficiency		
Unit of Measurement	Baseline	Benchmark
Number of households receiving services aimed to increase self-sufficiency (increase).	Number of households receiving services aimed to increase self-sufficiency prior to implementation = Zero (0) households	Number of households receiving services aimed to increase self-sufficiency after implementation = 23 households
Reducing Per Unit Subsidy Costs for Participating Households		
Unit of Measurement	Baseline	Benchmark
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 = \$0
Households Transitioned to Self Sufficiency		
Unit of Measurement	Baseline	Benchmark



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)	Number of households transitioned to self-sufficiency after implementation of this activity = 12 households will graduate from program
---	---	--

### MTW Activity #10-01: Specialized Housing Programs

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* N/A

*Description/Update:* In partnership with local organizations, OHA operates local non-traditional programs to serve the needs of low-income Oakland residents. This activity increases the allocation of resources to these programs to improve outcomes and leverage MTW funds to increase funding for services and other supports for MTW local non-traditional programs.

*Planned Non-Significant Changes:* A new sheriff in Alameda County was elected in 2022 and OHA anticipates that a new partnership will need to be negotiated with the new ASCO and projects for FY 2025 that there will be zero funds leveraged for PACT. As discussed in 11-05, PACT may be entering into a new partnership in FY 2025, which may leverage new funds.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table and the local OHA metrics table below.

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

Standard HUD Metrics		
CE #4: Increase in Resources Leveraged		
Unit of Measurement	Baseline	Benchmark
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars) = Zero (0)	Actual amount leveraged after implementation of the activity (in dollars) = \$0

--	--	--

<b>MTW Activity #10-02: Program Extension for Households Receiving Zero HAP</b>
---

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* 2021

*Description/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. This activity will apply to RAD voucher holders. This activity removes incentives for families to end employment or reduce sources of income in order to maintain housing assistance, encourages employment and provides additional security for participants trying to increase their income.

OHA extends the regulatory period by six months (versus the existing 2010-approved MTW extension of 18 months) to allow residents that achieve zero HAP the option to have a total 12-month period to remain on the program. They can revert to HAP one time during this period and if zero HAP is achieved a second time, the family will be notified that they have used their one option for extension and they will graduate/be terminated from the program.

OHA has included in Appendix J a revised form HUD-52641 – Housing Assistance Payment (HAP) Contract which includes a revision to section 4(b)(4) (Term of HAP Contract) to state that the HAP contract terminates automatically after 12 months after the last HAP payment to owner.

*Planned Non-Significant Changes:* OHA has no non-significant changes planned for this activity.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table below.

*Planned Significant Changes:* OHA has no significant changes planned for this activity.

Standard HUD Metrics		
SS #1: Increase in Household Income		
Unit of Measurement	Baseline	Benchmark
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 prior to implementation of the activity (in dollars) = \$74,097 (55% increase)

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance prior to implementing this activity = 20 households	Number of households receiving TANF assistance after implementing this activity = 6 households
<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = \$995	Expected average subsidy per household affected by this policy after implementation of the activity = Zero (0)
<b>SS #7: Increase in Agency Rental Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
PHA rental revenue/HAP in dollars (increase).	HAP prior to implementation of the activity (in dollars) = \$4,343,040	Expected HAP after implementation of the activity (in dollars) = \$10,991,459
<b>SS #8: Households Transitioned to Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 10 households	Number of households transitioned to self-sufficiency after implementation of this activity = 65 households
<b>Standard OHA Metrics</b>		
<b>Households Assisted by Services that Increase Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

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 = 0 households
--	---	---

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

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* N/A

*Description/Update:* Modify PBV program rules to allow HAP contracts to be executed for non-contiguous buildings. This activity will apply to RAD conversions. Reduce agency administrative costs associated with staff time and preparing, executing, and managing the HAP contracts.

OHA plans to use this activity for RAD voucher holders if a site qualifies as non-contiguous.

*Planned Non-Significant Change:* No non-significant changes planned for FY 2025.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table below.

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

Standard HUD Metrics		
CE #1: Agency Cost Savings		
Unit of Measurement	Baseline	Benchmark
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$52.61 (staff salary/hour) * 48 hours = \$2,525	Expected cost of task after implementation of the activity = \$52.61 * 0 hours = \$0
CE #2: Staff Time Savings		
Unit of Measurement	Baseline	Benchmark
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 = 48 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 6

		hours/contract * 0 contracts = 0 Hours
--	--	---

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

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* N/A

*Description/Update:* Modify the PBV program requirement to determine the initial contract rent for each PBV project. PBV program rules require initial contract rents to be determined using a comparability analysis or market study certified by a HUD approved independent agency for OHA-owned units. In addition, the definition of PBV “project” is expanded to include non-contiguous scattered sites. Initial PBV contract rents are determined based on bedroom sizes and are applicable to units of the same bedroom size within the project.

*Planned Non-Significant Changes:* OHA does not anticipate any changes or modifications to the activity in FY 2025.

*Planned Changes to Metrics/Data Collection:* OHA does not plan any changes to the metrics and data collection methods.

*Planned Significant Changes:* OHA has no planned significant changes for this activity in FY 2025.

Standard HUD Metrics		
CE #1: Agency Cost Savings		
Unit of Measurement	Baseline	Benchmark
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
CE #2: Staff Time Savings		
Unit of Measurement	Baseline	Benchmark
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

<b>HC #2: Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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
<b>HC #4: Displacement Prevention</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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)

#### **MTW Activity #10-05: Acceptance of Lower HAP in PBV Units**

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* N/A

*Description/Update:* As a result of public housing disposition, some households may meet the definition of “over-housed” based on differences in the occupancy policies in Section 8 programs. Additionally, a member of a PBV assisted family may leave or be removed from the household composition for one reason or another, during the course of an assisted tenancy. As a result, a family may no longer qualify for a unit they occupy and would be required to relocate to an appropriately sized unit when one may not be available. 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 and the family would not have to be displaced. OHA may opt to accept a lower HAP to house families in units when there are no families on the waitlist that qualify for the size units that are available.

This activity is used to ensure access to housing for families impacted by disposition and preservation of affordable units when a family's subsidy standard becomes less than the PBV unit size during the course of the tenancy.

*Planned Non-Significant Changes:* OHA has no planned non-significant changes to this activity in FY 2025.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table below.

*Planned Significant Changes:* OHA has not planned significant changes to this activity in FY 2025.

<b>Standard HUD Metrics</b>		
<b>HC #2: Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 5 units preserved
<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 (in dollars) = \$1,981
<b>HC #4: Displacement Prevention</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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) = 5 units

## **MTW Activity #10-06: Local Housing Assistance Programs**

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* 2021

*Description/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 2025, OHA projects only 10 households will remain of the original LHAP families.

### **SBHAP**

OHA requires that SBHAP program participants 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 are required to meet the HQS. Participant families are assisted by providers contracted by the City of Oakland and receive supportive services along with the housing assistance offered under the activity. OHA's contracts with the City leveraged resources, expertise, and community connections to deliver housing related services to up to 180 hard-to-house households on an annual basis in Oakland. This is an increase of 40 households which are housed by the City in Community Cabins. OHA implements a step-down program to allow program participants that have been stably housed for more than a year to transition to an HCV.

First Place for Youth supports the young adults in the SBHAP program with a variety of supportive services that focus on education and employment. The goal of the My First Place program is to help youth access the community resources available to them. Education and Employment



Specialists (EES) work 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 receives coaching from a trauma-trained, strength-based Youth Advocate (YA) that they work with weekly. YAs assist 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 work 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.

After demonstration of housing stability for one year, pending availability, OHA may elect to offer program participants the option to apply for an HCV and OHA does plan to implement this during FY 2025 pending availability of HCVs. These subcontractors provide program applicants via direct referral into the program managed by the City of Oakland.

### **BB-CalWORKs**

Under the OHA MTW Building Bridges-CalWORKs program, OHA provides rental assistance (up to 2 years) for formerly homeless Alameda County Social Services Agency (ACSSA) CalWORKs clients who are housed in Oakland and are employable and actively engaged in a plan to achieve self-sufficiency. OHA used its MTW resources to leverage commitments from ACSSA to provide wrap around case management services that address employment barriers and assist with access to other needed community resources. Based on funding availability, families who successfully complete the CalWORKs program and maintain their housing may be referred for eligibility screening for an HCV at OHA's discretion and OHA does plan to do this during FY 2025 pending availability of HCVs. OHA anticipates serving 30 families during the FY.

### **Building Bridges Key to Home Pilot Program (BB-KTH)**

#### Permanent Supportive Housing Partnerships

Building Bridges Key to Home Pilot Program (BB-KTH)

#### Description

OHA will partner with the Oakland Affordable Housing Preservation Initiative (OAHPI), Alameda County Health Care Services (HCSA) and Abode Services to provide property-based housing assistance to 23 families through a new local housing assistance pilot program. The program will provide 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 will have 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 will pay a flat rent based on AMI income category and sign an annual lease. Participants will be re-certified for AMI status bi-annually. Supportive services and case management will be 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 will be 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 will offer 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.

OHA may elect to use referrals from partners to house specialized populations such as but not limited to homeless families with children. These families may be offered supportive services if they are participants in programs or studies that involve supportive services.

### **Rental Assistance Subsidy (RAS) Program**

The Oakland Housing Authority's new Rental Assistance Subsidy (RAS) program offers an important and streamlined source of funding that ensures the sustainable and healthy operation of properties to serve Extremely Low-Income households at or below 30% of the Area Median Income (AMI). The Oakland Housing Authority (OHA) intends to use RAS on a case by case basis to support projects that will provide long-term affordable housing to Oakland's most vulnerable residents. The RAS is a fifteen (15) year subsidy that aims to fill any negative net income that results primarily from minimal collectable rents from extremely low-income households. RAS is thoroughly explained in the Single Fund Flexibility Section of this Plan.

### **Homekey/RAS- Inn at Coliseum Way**

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

All units will target people experiencing homelessness earning no more than 30 percent AMI. Referrals to Homekey units shall be made through the Coordinated Entry System (CES) for persons who are experiencing homelessness.

The project will also include a new lounge area, community kitchen, office spaces for onsite support services and property management, as well as landscape upgrades.

### **The Phoenix**

The Phoenix will be located at 801 Pine Street in the West Oakland Prescott neighborhood and will be comprised of 101 total newly constructed modular units, with 49 units targeting persons who are chronically homeless.

The Phoenix will also include a 7,000 square foot community building which will be home to a robust resident services program. The Phoenix is an integral part of a 316-unit mixed-income, mixed-use master plan. The entire master-planned site is approximately 4.65 acres in size; the Phoenix affordable site is 0.90 acres of that total, and will be jointly owned by, East Bay Asian Local Development Corporation (EBALDC) and Allied Housing / Abode.

#### 3050 International Boulevard.

3050 International is a 76-unit project (one manager's unit) sponsored by Satellite Affordable Housing Associates (SAHA) serving low-income individuals and families with 40% of units set-aside for homeless households. The project is targeted to serve households between 20%-50% AMI and will consist of 1BD (28 units), 2BD (28 units), and 3BD (19 units) dwellings. The project will include ground commercial spaces for a community health clinic and cultural center owned and operated by the Native American Health Center. The health clinic will offer primary care, pediatric and women's medical services. The project does not have a PBV award from OHA. Construction will begin in March 2024, and is projected to be complete in February 2026.

#### Lakehouse – East 12<sup>th</sup> Street

Lakehouse – East 12<sup>th</sup> Street is a 91-unit affordable family development that is a joint venture between EBALDC, Jordan Real Estate Investments and the Unity Council. The property will serve 67 families whose incomes range are between 40% - 60% of the median income and 23 formerly homeless families and transitional-aged foster youth with a full range of supportive services. . The project is located in the Eastlake neighborhood one block away from Lake Merritt. Construction will begin in March 2024 and is projected to be complete in April 2026.

#### Lake Merritt BART Senior Housing -RAS

Lake Merritt BART Senior Housing is a 97-unit transit-oriented affordable development for low-income and formerly homeless seniors located in Oakland's Chinatown neighborhood. The project will be constructed on BART-owned land directly over the Lake Merritt BART station and will be the first of four buildings that are part of larger-multi-phase transit-oriented development in partnership with Strada Investment Group and BART. Which should be in construction during the FY. Construction is projected to begin in June 2024 and be complete in Summer 2026.

#### Housing Disability Assistance Program (HDAP)

The Alameda County Health Care Services Agency (HCSA) received an influx of State Housing and Disability Advocacy Program (HDAP) one-time funds through the Alameda County Social Services Agency to provide housing support and related services to persons and families experiencing homelessness, specifically targeting those who are disabled and eligible for other public benefits. The total amount of the funding is about \$17.4 million, which includes \$9.4 million competitively allocated one-time funds. Alameda County anticipates receiving regular allocations of approximately \$6 million annually from future State budgets. As a significant number of

Alameda County residents who meet the HDAP criteria reside in Oakland, HCSA is proposing a partnership with OHA to deploy approximately \$9 million of these funds to implement a tenant, and project-based housing subsidy program. OHA would serve as the administrator of the funds allocated to housing placement contractors or projects selected through a competitive County process. As future funding becomes available, the MOU could be amended to expand and/or continue services accordingly.

HDAP funds are allocated for the provision of housing supports, disability benefits application assistance and advocacy for people likely eligible for disability benefits. In compliance with all state-funded housing programs, the use of HDAP funding incorporates the core components of Housing First (in accordance with W&I code section 8255) and participation within the County's Coordinated Entry System (CES). The County is leading a multi-agency stakeholder process to develop a unified Local Housing Program (LHP). The outcome of this process will be a framework of policies, and selection and monitoring procedures for the implementation of supportive housing funding in the County, including this proposed program. This design process is expected to conclude at the end of October 2022.

HDAP funds target individuals who are experiencing homelessness to apply for disability benefit programs, while also providing housing assistance and other services to stabilize clients. Utilizing the Coordinated Entry system housing crisis queue, HDAP funding priority is given to individuals (including individuals in families) experiencing chronic homelessness, or who are homeless and rely most heavily on government-funded services. All four core HDAP components are offered concurrently: outreach, case management, disability benefits advocacy and housing assistance; HCSA's partnership with OHA will support housing assistance, while other components are overseen within HCSA-maintained service agreements.

The County intends to issue a Solicitation of Intent (SOI) for housing projects and providers to be selected in accordance with the criteria developed in the multi-agency LHP process. OHA would then execute agreements with the awardees.

HCSA provided briefing materials to the Alameda County Board of Supervisors (BOS) as part of the August 12<sup>th</sup> Board packet. HCSA intends to return to the BOS in early October requesting a delegation of authority for the HCSA Director to enter into an MOU with OHA. Pending approval, staff from HCSA and OHA plan to execute the MOU by November 2022, after which OHA will begin administering the funds. The desired execution date of the MOU would allow HCSA to transfer the funds to OHA and begin the SOI process.

*Planned Non-Significant Changes:* Added two new RAS Projects, Lakehouse East 12<sup>th</sup> Street and Lake Merritt BART Senior Housing, see descriptions above.

#### **BB-THP+**

The Building Bridges – Transitional Housing Plus (THP+) was closed out due to leasing challenges, after a phase down of funding in the last three years. OHA anticipates conducting an evaluation of the program to identify the issues, and release a Request for Proposal (RFP) to identify new potential partners to serve this same population (youth who have aged out of foster

care) during the FY. As zero families are projected to be served, THP+ has been removed from the metrics.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table below.

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

<b>Standard HUD Metrics</b>		
<b>HC #1: Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase) <b>LHAP</b>	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 = 10
<b>SBHAP</b>	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 = 175
<b>BB-CalWORKs</b>	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 = 29
<b>BB-KTH</b>	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
<b>Homekey/RAS – Coliseum Way, Additional projects</b>	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 = 12
<b>Rental Assistance Subsidy (RAS) Projects –</b> - <b>Phoenix</b> - <b>OHA RFP Projects</b>	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 = - <b>Phoenix (101 units)</b> - <b>OHA RFP Projects (33 units)</b>

<b>Housing Disability Assistance Program (HDAP) – 7<sup>th</sup> and Campbell</b>	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 = 39 units
<b>Total number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).</b>	<b>Total number of households who would not qualify for an available unit based on household composition = Zero (0)</b>	<b>Total expected housing units of this type after implementation of the activity = 422</b>
<b>HC #5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). <b>LHAP</b>	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
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). <b>SBHAP</b>	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 = 175
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). <b>BB-CalWORKs</b>	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 = 29
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). <b>BB-KTH</b>	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 = 23
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 = 12



<b>Homekey – Coliseum Way and additional projects</b>		
<b>Rental Assistance Subsidy (RAS) Projects –</b> <ul style="list-style-type: none"> <li>- <b>Phoenix</b></li> <li>- <b>OHA RFP Projects</b></li> </ul>	Number of households who would be 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 = <ul style="list-style-type: none"> <li>- <b>Phoenix (101 units)</b></li> <li>- <b>OHA RFP Projects (33 units)</b></li> </ul>
<b>Housing Disability Assistance Program (HDAP) – 7<sup>th</sup> and Campbell</b>	Number of households who would be 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 = 39 units
<b>Total number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).</b>	<b>Total households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)</b>	<b>Total expected housing units of this type after implementation of the activity = 422</b>
<b><i>HC #7: Households Assisted by Services that Increase Housing Choice</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households receiving services aimed to increase housing choice (increase). <b>LHAP</b>	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 = 10
Number of households receiving services aimed to increase housing choice (increase). <b>SBHAP</b>	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 =175
Number of households receiving services aimed to increase housing choice (increase). <b>BB-CalWORKs</b>	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 =29
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 =23



<b>BB-KTH</b>		
Number of households receiving services aimed to increase housing choice (increase). <b>Homekey – Coliseum Way and additional projects</b>	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 =12
<b>Rental Assistance Subsidy (RAS) Projects –</b> - <b>Phoenix</b> - <b>OHA RFP Projects</b>	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected housing units of this type after implementation of the activity = - <b>Phoenix (101 units)</b> - <b>OHA RFP Projects (33 units)</b>
<b>Housing Disability Assistance Program (HDAP) – 7<sup>th</sup> and Campbell</b>	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected housing units of this type after implementation of the activity = 39 units
<b>Total number of households receiving services aimed to increase housing choice (increase).</b>	<b>Total households receiving this type of service prior to implementation of the activity = Zero (0)</b>	<b>Total expected housing units of this type after implementation of the activity = 422</b>

#### **MTW Activity #10-08: Redesign FSS Program**

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* 2021

*Description/Update:* OHA launched the Family Self Sufficiency (FSS) program redesign built on best practices in the industry and, where applicable, working in tandem with other community-based programs and initiatives. Proposed changes are as follows: (1) Expand eligible participation to MTW local non-traditional programs; (2) Allow for the full-time student rule to apply to Head of Household (HOH)/Co-head/Spouse; (3) Implement an FSS escrow Table with defined income ranges and associate escrow amounts. OHA anticipates that this re-design will incent increased participation in the FSS program by encouraging increased skills and job training among program participants which includes those who are enrolled in school or educational programs. The current program and escrow calculation is designed to allow families who are low income or not working to accumulate more escrow as they become employed. OHA is proposing changes that would allow escrow to be accumulated for those that are both high and low wage earners. These changes will have an impact on escrow earnings which will allow for a wide range of income levels to accrue escrow sooner than they would have otherwise and support the statutory objective of providing incentives for families with children to become self-sufficient.

The goal of the FSS program is to facilitate and support participants to become self-sufficient. OHA defines self-sufficiency for this activity as the ability to meet individual and household needs, plan for and achieve short and long-term goals, deal with emergencies with resilience, and use information and skill sets to find and take advantage of available resources. Metrics to measure achievement of self-sufficiency will be defined as graduating from FSS and receiving the balance of the escrow account.

Currently, OHA offers the FSS program to the following housing programs: Public Housing, Project Based Voucher, and Housing Choice Voucher (HCV). OHA plans to allow other families not eligible under regulations to participate in the FSS program, including MTW local non-traditional program participants. Per 24 CFR 984.103, eligible families are defined as: current residents of public housing (section 9) and current Section 8 program participants, as defined in this section, including those participating in other local self-sufficiency programs.

Program regulations do not allow for the Head of Household (HOH)/Co-head/Spouse participants to receive the full-time student exclusion that is provided to other adult household members. OHA is requesting that all earnings above \$480 be excluded for full-time student HOH/Co-Head/Spouses during the first two years of participation in the FSS program. Per 24 CFR 5.609 © (11), earnings in excess of \$480 for each full-time student 18 years or older (excludes the head of household and spouse). OHA proposes allowing this student exclusion as an option for HOH/Co-head/Spouses. OHA anticipates that allowing this waiver will encourage higher learning, job training, and increased wages for FSS families, supporting the statutory objective of providing incentives for families with children to become self-sufficient.

Per 24 CFR 984.305, (1) Determining the family's baseline information. When determining the family's baseline annual earned income and the baseline monthly rent amounts for purposes computing the FSS escrow credit, the PHA or owner must use the amounts on the family's last income re-examination.

Per 24 CFR 984.305, (2) Computation of amount. The FSS credit amount shall be the lower of: (i) Thirty (30) percent of one-twelfth (1/12) (i.e., two and a half (2.5) percent) of the amount by which the family's current annual earned income exceeds the family's baseline annual earned income; or (ii) The increase in the family's monthly rent. The increase in the family's monthly rent shall be the lower of: (A) The amount by which the family's current monthly rent exceeds the family's baseline monthly rent; (B) For HCV families, the difference between the baseline monthly rent and the current gross rent (i.e., rent to owner plus any utility allowance) or the payment standard, whichever is lower; or (C) For PBV, Mod Rehab, and PBRA families, the difference between the baseline monthly rent and the current gross rent (i.e., rent to owner or contract rent, as applicable, plus any utility allowance).

Per 24 CFR 984.305, (3) Ineligibility of FSS Credit. FSS families who are not low-income families (i.e., whose adjusted annual income exceeds eighty (80) percent of the area median income) shall not be entitled to any FSS credit.

The current regulatory method to calculate escrow incentivizes working families to quit their job to start the program at a lower baseline income and monthly rent. The current method also disincentivize current participants from increasing their adjusted annual income beyond 80% of the area median income. OHA is requesting a waiver from the above regulations to implement a new method for calculating escrow credit. Escrow credit will be based only on the earned income range for the household as defined below in Table A. This method of calculating escrow uses the FSS Household's current Annual Earned Income to determine escrow. It also removes the ineligibility for escrow credit when an FSS Household's Adjusted Annual Income exceeds 80% of the area median income. OHA proposes the following schedule ranges for earned income with an associated escrow credit corresponding to the income range. See table A below for proposed income ranges and escrow credit:

Table A: FSS Income/Escrow Table	
\$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

Implementation was completed in FY 2023, including changes to the OHA business system to support this new table and escrow credit calculation. The FSS Action Plan has been updated and approved, and OHA's business system has begun enrolling new FSS participants into the FSS redesign in FY 2023.

OHA will allow non-eligible program participants such as those in MTW local non-traditional programs to apply to participate in the FSS program. Programs such as PACT (Activity 11-05) have supportive services to facilitate job training and workforce development skills and these participants can benefit from additional FSS supportive services and escrow accumulation. OHA also has over 500 public housing participants in public housing sites managed by third party property managers, some in mixed finance sites, and these families will be allowed to apply for FSS participation. The third-party managers use a different business system and OHA anticipates planning and procedures needed to accommodate new FSS participants in OHA's existing business system will commence in FY 2024 and take most or all of the FY.

OHA has completed testing on the custom software programming that was required to its business system to implement the FSS redesign. OHA has updated the FSS Action Plan to align with the FSS Redesign and the Final Rule issued in June 2022, which updated HUD regulations. OHA received final approval of its FSS Action Plan on November 11, 2022.

OHA plans to implement the activity at different time intervals beginning in the summer of 2022. OHA will develop a revised Action Plan and submit to the local HUD office for review and approval. Once approved, OHA will begin enrolling local non-traditional program participants into the FSS program. New participants will have the option of selecting the full-time student exclusion for HOH/Co-head/Spouse during the first two years they are in the program and their escrow will be calculated based on the new escrow schedule. OHA will continue implementation planning to allow Public Housing residents at our third-party sites the ability to enroll in the FSS program. This part of the redesign will require inter-agency support to implement the business system changes. OHA anticipates this part of the activity to be implemented in spring of 2023.

OHA implemented the FSS redesign. Participants who enroll after the effective start date will abide by the new Action Plan and escrow calculation method. Current FSS participants will not have the option of changing the method used to calculate their escrow.

Additionally, per 24 CFR 5.612, No assistance shall be provided under section 8 of the 1937 Act to any individual who: (a) Is enrolled as a student at an institution of higher education, as defined under section 102 of the Higher Education Act of 1965 (20 U.S.C. 1002); (b) Is under 24 years of age; (c) Is not a veteran of the United States military; (d) Is unmarried; (e) Does not have a dependent child; (f) Is not a person with disabilities, as such term is defined in section 3(b)(3)(E) of the 1937 Act and was not receiving assistance under section 8 of the 1937 Act as of November 30, 2005; and (g) Is not otherwise individually eligible, or has parents who, individually, or jointly, are not eligible on the basis of income to receive assistance under section 8 of the 1937 Act.

OHA anticipates there may be some FSS participants under the age of 24 who decide to take advantage of the full-time student exclusion during their first two years in the FSS program. Some of these participants may meet the requirements under the restrictions set forth in 24 CFR 5.612. OHA is proposing these restrictions be waived for those participants to allow all FSS participants

the opportunity to further their education and take advantage of the full-time student exclusion. All current FSS participants under the age of 25 receive housing assistance through the FUP Youth Demonstration or FYI Initiative. Waiving 24 CFR 5.612 allows youth enrolled in these programs may not be eligible to participate in the full-time student exclusion. This waiver was approved in the FY 2024 Plan.

OHA intends to set an effective start date for the FSS redesign on February 1, 2022. Participants who enroll after the effective start date will abide by the new Action Plan and be enrolled in the FSS redesign program.

Participants who enroll after the effective start date will abide by the new Action Plan and escrow calculation method. New participants who enroll after the start date will not have the option of selecting between the traditional FSS program and the FSS redesign. OHA will continue to utilize the new Action Plan throughout FY 2025.

*Planned Non-Significant Changes:* There are no non-significant changes.

*Planned 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.

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

<b>Standard HUD Metrics</b>		
<b>SS #1: Increase in Household Income</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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)
<b>SS #2: Increase in Household Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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)
<b>SS#3: Increase in Positive Outcomes in Employment Status</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

Report the following information separately for each category:		
1) Employed Full-Time	1) 67 Participants	1) 10 Participants
2) Employed Part-Time	2) 30 Participants	2) 10 Participants
3) Enrolled in an Educational Program	3) 16 Participants	3) 10 Participants
4) Enrolled in Job Training Program	4) 1 Participant	4) 5 Participants
5) Unemployed	5) 92 Participants	5) 10 Participants
6) Other-Drug Rehab Counseling	6) 0 Participants	6) 0 Participants
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
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
SS#5: Households Assisted by Services that Increase Self Sufficiency		
Unit of Measurement	Baseline	Benchmark
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
SS #6: Households Transitioned to Self Sufficiency		
Unit of Measurement	Baseline	Benchmark
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	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

"Outcome" number should also be provided in Section (II) Operating Information in the space provided.		
---	--	--

#### **MTW Activity #10-09: Altered Minimum Stay Requirement for PBVs**

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Plan Year Amended:* None

*Description/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 and if a voucher or comparable tenant-based assistance is not available, give the family priority to receive the next available opportunity for continued tenant-based rental assistance. This activity allows OHA to extend or reduce the minimum stay requirement for residents and gives OHA the discretion to prioritize families on the HCV waitlist.

OHA will review whether to extend the minimum stay requirement to 2 years or indefinitely during the annual planning process and the Executive Director or his designee will consider various factors such as number of requests in the prior Fiscal Year, Oakland vacancy rates and input from affordable housing providers on turnover rates and their impacts.

If the decision is made to extend the minimum stay to 2 years or indefinitely, OHA will inform the public and residents through the standard public comment period which is required to vet the MTW Plan. The Tenancy Addendum form has been modified to include the new minimum stay requirement or removal of the option of tenant-based assistance which is distributed to tenants when they move into a PBV unit.

For FY 2025, OHA intends to continue to require a 2-year minimum stay in PBV assisted households to request tenant-based assistance. To limit the impact on the HCV waitlist, the issuance of vouchers may be subject to a ratio 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. Typically, the ratio is five to one to ensure OHA meets the needs of residents who may not already be housed.

This activity will not apply to families: (1) with an approved Reasonable Accommodation that required them to move from their PBV unit, (2) who experience a change in family composition that affects the size of the unit, or (3) who present a compelling reason to move out of the PBV unit (will be reviewed on a case by case basis). Circumstances surrounding the request to move,



such as VAWA requirements, employment opportunities in other public housing jurisdictions and availability of tenant-based vouchers will be considered.

The minimum stay will only be reduced to less than 1 year in situations where a disposition of public housing units has been approved.

OHA may suspend the option for families to transfer from a PBV unit to a tenant-based assisted unit in response to tight market conditions. Residents will have the option to request a transfer to another PBV assisted unit that is available.

*Planned Non-Significant Changes:* There are no non-significant changes planned.

*Planned Changes to Metrics/Data Collection:* There are no changes to the standard metrics or data collection methods for the activity are reflected in the table below.

*Planned Significant Changes:* OHA does not anticipate any significant changes or modifications in FY 2025.

<b>Standard OHA Metrics (applies to increased minimum stay households)</b>		
<b>Number of Requests to Move that are Required to wait two years</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of new move requests from PBV to HCV that are required to wait due to altered minimum stay of two years	Average number of requests that had to wait to move for an altered minimum stay requirement prior to implementation = zero (0) requests	Number of requests that are required to wait a minimum of two years prior to receiving an HCV = 150 requests
<b>Number of Vouchers Issued for Move Requests</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of HCVs issued to PBV residents who waited to move based on an altered minimum stay of two years (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 = 10 Households
<b>Standard HUD Metrics (applies to decreased minimum stays)</b>		
<b>HC #3: Decrease in Wait List Time</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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) = 96
<b>HC #4: Displacement Prevention</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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. (HCV)	Households losing assistance prior to implementation of activity. (Number of households where voucher expires) This metric does not apply to the goals for this activity and therefore is not something that OHA can measure relative to it.	Expected households losing assistance after implementation of activity. This metric does not apply to the goals for this activity and therefore is not something that OHA can measure relative to it.
<b>HC #5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 0

#### **MTW Activity #08-01: Fund Affordable Housing Development Activities**

*Plan Year Approved:* 2008

*Plan Year Implemented:* 2008

*Plan Year Amended:* None

*Description/Update:* Utilize Single Fund Flexibility to leverage funds to preserve affordable housing resources and create new affordable housing opportunities in Oakland. These housing opportunities provide units under the traditional programs as well as local, non-traditional units. This activity will create new and replacement affordable housing thereby increasing the housing choices for low-income households.

OHA continues to develop affordable housing to expand opportunities for families in need. Current projects and initiatives in development include:

- Brooklyn Basin – OHA, in partnership with the City of Oakland and MidPen Housing Corporation, are developing 465 units, across four projects, of affordable housing for low-

income families, seniors, and formerly homeless households as part of the Brooklyn Basin master planned community. The final project, Foon Lok East, will complete construction in March 2024 and is anticipating lease-up through summer 2024. Foon Lok East will contribute 124 new units (61 with PBVs) for families and will complete this significant multi-phased affordable project that is an integral part of this new community comprised of 3,100 new homes, up to 200,000 square feet of commercial space and approximately 32 acres of parks and open space along the Oakland waterfront. OHA purchased a 50% share of the four affordable parcels at Brooklyn Basin with \$10 million of MTW funds and now co-owns the land with the City of Oakland.

- 285 12<sup>th</sup> Street - OHA is partnering with the East Bay Asian Local Development Corporation (EBALDC) to construct a new affordable housing building with 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. Depending on the project's ability to secure additional financing, OHA may enter into an AHAP contract to provide PBV assistance to 16 units and HUD-VASH PBV assistance to an additional 8 units during FY 2025. OHA is also using MTW funds to provide loans to the project and will purchase the site at the beginning of construction.
- Harrison Street Master Planning and Strategic Redevelopment – In addition to 1619 / 1621 Harrison Street (OHA's headquarters and the Harrison Tower senior residence), OHA owns five (5) parcels on Harrison Street. As a result of the strategic analysis of these sites for potential redevelopment in FY 2024, OHA will continue its internal planning discussions to determine how best to move forward with redevelopment of one or more sites in FY 2025. The site addresses are: 1801 Harrison Street, 1805 Harrison Street, 1600 Harrison Street, 1538 Harrison Street, and 1440-1500 Harrison Street.
- Mandela Station Affordable – Strategic Urban Development Alliance (SUDA) and their to-be-approved partner will be developing Mandela Station, a mixed-use transit-oriented development at the West Oakland BART station. Mandela Station includes a 240-unit affordable housing component. OHA is currently negotiating with the developers on providing a loan and PBVs to help finance the project. During FY 2025, OHA will continue negotiations with SUDA for a Development and Loan Agreement.
- The Inn at Coliseum Way, located at 4801 Coliseum Way, entails the conversion of an underutilized motel into 36 Homekey units as permanent supportive housing (plus one manager's unit). The project is a joint venture of Danco Communities and Operation Dignity. All units will target people experiencing homelessness earning no more than 30 percent AML. Referrals to Homekey units shall be made through the Coordinated Entry System (CES) for persons who are experiencing homelessness. OHA has awarded the project a Rental Assistance Subsidy.
- The Phoenix will be located at 801 Pine Street in the West Oakland Prescott neighborhood and will be comprised of 101 total newly constructed modular units, with 49 units targeting persons who are chronically homeless. The Phoenix will also include a 7,000 square foot

community building which will be home to a robust resident services program. The Phoenix is an integral part of a 316-unit mixed-income, mixed-use master plan. the Phoenix will be jointly developed and owned by East Bay Asian Local Development Corporation (EBALDC) and Allied Housing. OHA has awarded the project a Rental Assistance Subsidy.

- 3050 International is a 76-unit project (one manager's unit) sponsored by Satellite Affordable Housing Associates (SAHA) serving low-income individuals and families with 40% of units set aside for homeless households. The project is targeted to serve households between 20%-50% AMI and will consist of 1BD (28 units), 2BD (28 units), and 3BD (19 units) dwellings. The project will include ground commercial spaces for a community health clinic and cultural center owned and operated by the Native American Health Center. The health clinic will offer primary care, pediatric and women's medical services. OHA has awarded the project a Rental Assistance Subsidy.
- Foothill Family Apartments – Foothill Family Apartments, LP, is a 65-unit mixed-finance affordable housing development that is wholly owned by OHA and Oakland Housing Initiatives, a nonprofit affiliate of OHA. Foothill Family Apartments is approximately 20 years old and requires the repair and rehabilitation of the following: replacement of building systems at the end of their useful life, dry rot repairs, accessibility improvements, and other deferred maintenance items. During FY 2025, OHA will continue working towards the final approval of the Section 18 – RAD Blend application and anticipates starting construction.
- 500 Lake Park – OHA is assisting EAH with the development of a 53-unit affordable housing development at 500 Lake Park Avenue and construction may break ground in FY 2025. The planned building, which is in the Grand Lake neighborhood, will also include 2,900 square feet of commercial space. OHA purchased the site in June 2021 using MTW funds, and it is providing loans to the project. The Authority will also provide 14 project-based VASH vouchers.
- 2700 International Blvd. is a 75-unit project (one manager's unit) sponsored by the Unity Council that will serve very low-income families and veterans experiencing homelessness with incomes between 30%-60% AMI. OHA has awarded the Unity Council 19 VASH vouchers which will be allocated to 1BD units at the 30% (17 units) and 40% (two units) AMI thresholds and a development loan. The project will have approximately 2,800 sq. ft. of community serving commercial space on the ground floor.
- 77<sup>th</sup> & Bancroft – 77<sup>th</sup> & Bancroft is a former public housing site now owned by California Affordable Housing Initiatives, an affiliate of OHA. The former apartment buildings on the property have been demolished. CAHI has selected Eden Housing and the Black Cultural Zone Community Development Corporation to develop a new affordable housing development for very low-income senior citizens on the property.

- Lakehouse – East 12<sup>th</sup> Street is a 91-unit affordable family development that is a joint venture between EBALDC, Jordan Real Estate Investments and the Unity Council. The property will serve 67 families whose incomes range are between 40% - 60% of the median income and 23 formerly homeless families and transitional-aged foster youth with a full range of supportive services. The property will also include 425 square feet of commercial space for a community-serving retail. The project is located in the Eastlake neighborhood one block away from Lake Merritt. OHA has awarded the project a development loan and a Rental Assistance Subsidy.
- Lake Merritt BART Senior Housing is a 97-unit transit-oriented affordable development for low-income and formerly homeless seniors located in Oakland's Chinatown neighborhood. The project will be constructed on BART-owned land directly over the Lake Merritt BART station and will be the first of four buildings that are part of larger-multi-phase transit-oriented development in partnership with Strada Investment Group and BART. OHA has awarded the project a Rental Assistance Subsidy.
- 2530 9<sup>th</sup> Avenue is a prospective 100% affordable new construction project on a former public housing site that is now owned by California Affordable Housing Initiatives, Inc., an affiliate of OHA. Approximately 30 units for low-income families are contemplated at the site.
- 75<sup>th</sup> and MacArthur is a prospective 100% affordable new construction project that would include approximately 145 units on a former public housing site that is owned by OHA.
- 1236 East 17<sup>th</sup> Street is a prospective 100% affordable new construction project that would include approximately 20 units on a former public housing site that is owned by OHA.
- Acquisition – OHA will seek opportunities to acquire land and existing housing in order to preserve and create new housing opportunities. Opportunities to acquire vacant land and existing buildings are unpredictable and depend on properties coming on the market or OHA negotiating with property owners for off-market sales. It is anticipated that OHA could acquire approximately three sites with approximately 300 housing units using \$40 million of MTW funds. These figures are general representations of the Authority's intent to acquire property and do not represent specific sites. At this time, OHA is pursuing two prospective acquisitions:
  - 401 Santa Clara Avenue, Oakland: An existing building located in the Grand Lake neighborhood that consists of 103-units, ample indoor and outdoor amenity spaces, and is within walking distance to high quality commercial and retail business, Lake Merritt, and high performing public schools.
  - 1888 Martin Luther King Way: A newly constructed mixed-use building that includes 88-units and approximately 2,300 square feet of ground floor commercial or building amenity space and a large rooftop deck.
- Reposition Current Assets – OHA will seek opportunities to reposition existing real estate owned by OHA in order to create new high quality housing opportunities.

- **Financing & Partnerships** – OHA will provide financing to new affordable housing projects throughout Oakland through a variety of selection processes:
  - **Rental Assistance Subsidy (RAS)** – OHA has a new financing program to provide subsidy to affordable housing projects that serve a minimum of 25% Extremely Low-Income households and therefore are projected to operate at a deficit. The subsidy would be capitalized and will be disbursed annually contingent upon compliance with OHA’s standards and procedures. The RAS may be awarded to projects through an OHA published Notice of Funding Availability (NOFA) or one of the City of Oakland’s published NOFAs, as described below. These projects are described in more detail in activity #10-06.
  - **OHA Notice of Funding Availability (OHA NOFA)** – OHA plans to release a Request for Proposals to solicit either new construction or rehabilitation projects that require acquisition, predevelopment, permanent gap funding, RAS, and/or RAD/PBV assistance with a priority for projects that serve Extremely Low-Income households and for those that can begin construction within twelve (12) months.
  - **City of Oakland Notices of Funding Availability (City NOFA)** – OHA considers possible awards of RAS or PBVs to projects that are selected for funding through City of Oakland’s NOFAs. During FY2025, OHA may consider awards to projects selected by the City to apply for funding through the State of California’s Homekey 4.0 program, the City’s New Construction NOFA, as well as its Affordable Housing Acquisition, Rehabilitation and Naturally Occurring Affordable Housing (NOAH) Preservation Program.
- **Buyouts** – OHA will exercise its option to purchase the tax credit investor limited partner interests in Low Income Housing Tax Credit Partnerships in order to preserve affordable housing. During FY 2025, OHA may purchase the investor limited partners’ interest in Tassafaronga Village Phase I and II.

**Planned Non-Significant Changes:** OHA added Lakehouse- East 12<sup>th</sup> Street and 77<sup>th</sup> and Bancroft, details above.

**Planned Changes to Metrics/Data Collection:** Changes to the benchmarks of each metric reflect the updated totals planned for development activities and are included in the Standard HUD Metrics table below.

**Planned Significant Changes:** OHA has no planned significant changes to this activity.

<b>Standard HUD Metrics</b>		
<b>HC #1: Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

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.	Housing units of this type prior to implementation of the activity = Zero (0)	Expected housing units of this type after implementation of the activity = 188 total units (34 traditional subsidies and are accounted for in the HCV families served total) Total LNT units are 154.
<b>HC #2: Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 65 units
<b>HC #5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 = 188households (34 are using traditional PBV subsidies, 154 LNT)

#### **MTW Activity #06-01: Site-Based Wait Lists**

*Plan Year Approved:* 2006

*Plan Year Implemented:* 2006

*Plan Year Amended:* None

*Description/Update:* Establish site-based wait lists at all public housing sites, HOPE VI sites, and developments with PBV allocations. The selection and pre-screening of prospective tenants at each site improves efficiency and reduces the duplication of administrative functions. Site-based wait lists allow applicants to choose what sites or areas of the city they choose to live and reduces the number of households rejecting an apartment because it is not near the family's support systems, work and schools. Applicants may apply for multiple lists as well. Additionally, OHA has chosen to use a lottery system at its site-based wait lists to reduce the list to a number where

offers can be made in a reasonable period of time. Thus, the site-based wait lists will be opened and closed more frequently thereby increasing the frequency of access to affordable housing opportunities, reducing the long waiting periods for applicants, and reducing the need and cost of wait list purging and maintenance. This activity will apply to RAD vouchers. OHA plans to use this activity for RAD vouchers.

*Planned Non-Significant Changes:* OHA does not have any planned changes to this activity.

*Planned Changes to Metrics/Data Collection:* There are no planned changes to metrics or data collection.

*Planned Significant Changes:* OHA has no planned significant changes for this activity in FY 2025.

<b>OHA and Standard Metrics</b>		
<b>CE #3: Decrease in Error Rate of Task Execution</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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%
<b>HC #3: Decrease in Wait List Time</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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
Campbell Village	60 months	65 months
Lockwood Gardens	60 months	48 months
Peralta Villa	60 months	48 months
Harrison Towers	60 months	N/A due to pending disposition
Adel Court	60 months	60 months
Palo Vista Gardens	60 months	24 months
Linden Court	60 months	55 months
Mandela Gateway	60 months	55 months
Chestnut Court	60 months	24 months
Foothill Family Apts	60 months	75 months
Lion Creek Crossing	60 months	24 months
<b>OHA Metric - Vacancy Rate per public housing site</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>



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%
Campbell Village	2%	1.32%
Lockwood Gardens	2%	2.71%
Peralta Villa	2%	1.29%
Harrison Towers	2%	N/A pending disposition
Adel Court	2%	1.11%
Palo Vista Gardens	2%	0.93%
Linden Court	2%	1.54%
Mandela Gateway	2%	3.80%
Chestnut Court	2%	0.93%
Foothill Family Apts	2%	0.79%
Lion Creek Crossing	2%	1.76%

### MTW Activity #06-02: Allocation of PBV Units: Without Competitive Process

*Plan Year Approved:* 2006

*Plan Year Implemented:* 2006

*Plan Year Amended:* None

*Description/Update:* Allocate PBV units to developments owned directly or indirectly by OHA without using a competitive process. This activity will reduce the administrative time and development costs associated with issuing an RFP. Increase housing choices by creating new or replacement affordable housing opportunities. OHA reserves the option to issue new awards based on need, development opportunities and funding availability during the fiscal year.

*Planned Non-Significant Changes:* OHA does not anticipate any changes or modifications to the activity in FY 2025.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table below.

*Planned Significant Changes:* OHA does not have any planned significant changes for this activity.

Standard HUD Metrics		
CE #1: Agency Cost Savings		
Unit of Measurement	Baseline	Benchmark



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
<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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

#### **MTW Activity #06-03: Allocation of PBV Units: Using Existing Competitive Process**

*Plan Year Approved:* 2006

*Plan Year Implemented:* 2006

*Plan Year Amended:* None

*Description/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 will reduce the administrative time and development costs associated with issuing an RFP and increase housing choice by creating new or replacement affordable housing opportunities. If the City of Oakland allocates funding through its NOFA in FY 2025, OHA will evaluate awarded projects and opportunities to participate via PBV allocations to increase housing choices for low-income families in the City of Oakland. OHA will explore strategic partnerships with the City, County and County Agencies to expand affordable housing options through these PBV allocations, particularly for veterans and special needs populations served by those agencies' programs.

*Planned Non-Significant Changes:* OHA does not anticipate any changes or modifications to the activity in FY 2025.

*Planned Changes to Metrics/Data Collection:* There are no changes to the metrics or data collection methods included in the Standard HUD Metrics table below.

*Planned Significant Changes:* OHA has no planned significant changes for this activity.

<b>Standard HUD Metrics</b>		
<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

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
<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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
<b>Standard OHA Metrics</b>		
<b>Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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)	Expected housing units of this type after implementation of the activity = 0
<b>Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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)	Housing units preserved prior to implementation of the activity = 0
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

## B. Not Yet Implemented Activities

OHA does not have any activities that have not been implemented.

### C. Activities on Hold

Table 14: Approved MTW Activities on Hold					
Activity # and year approved	Fiscal Year Implemented (Year placed on HOLD)	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
20-01	2020	Emergency Relief from Interim Re-certifications	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, Section D.1.c, Attachment D, Use of Funds
17-02	2018	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.and c.
13-01	2017	Rent Reform Pilot Program	<p>Creates a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where:</p> <ul style="list-style-type: none"> <li>• Total Tenant Payment (TTP) calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households</li> <li>• Triennial recertification schedule for senior and</li> </ul>	<p>Reduce costs and achieve greater cost effectiveness</p> <p>Provide incentives for families with children to become economically self-sufficient</p>	Attachment C, Section C.4, C.11 Section D.1.c Section D.2.a

			disabled households, biennial schedule for work-eligible households <ul style="list-style-type: none"> <li>• Eliminate all deductions and earned income disallowance</li> <li>• Recent increases in income excluded in recertification</li> <li>• Absolute minimum rent of \$25</li> </ul>		
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
09-02	2010 (2015)	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 #20-01: Emergency Relief from Interim Re-certifications**

*Description/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.

OHA plans to deploy this activity on a month-by-month basis as needed until the effects of the health crisis on OHA residents have subsided. Programs included in the scope of activity and analysis include public housing, housing choice voucher (HCV), local non-traditional programs and non-MTW programs, however the activity may be implemented for a limited number of eligible programs based on Executive Director discretion. OHA will closely monitor data regarding interim requests and make evidence-based decisions for which programs this activity will be applied. OHA will establish tracking metrics to monitor staff time savings and re-purposing of staff that are freed up from normal operations.

This activity meets the objective of achieving greater cost effectiveness and may be used during any emergency such as a pandemic, earthquake, etc. OHA anticipates this activity will provide cost savings and efficiencies for OHA during a time of increased participant requests and paperwork and decreased staffing. These efficiencies will offset the decrease in revenue due to loss of rental income for public housing and increased costs due to payment of tenant portions of rent for HCV, LNT and non-MTW program participants. It will also allow OHA the opportunity to redirect critical, limited staffing resources to high priority items like leasing vacant units for homeless families and addressing emergency non-income related requests.

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

OHA may implement this activity on a short-term basis for wage-earning households that experience an unexpected loss of income during the disaster period for any combination of the following groups, based on funding availability:

#### HCV Program Participants

OHA may pay all or a portion of the contract rent and suspend re-certifications, interims, and late rent notices during the period of implementation for those wage-earning participants that qualify. This will save staff time in processing re-certifications, interims, circumstance changes, sending late rent notices and customer service requests regarding these items. For landlords that are on hold or abated, OHA may continue to pay the tenant portion of rent until the abatement has been cleared for those participants that qualify.

#### Public Housing Participants

OHA may waive all or a portion of the tenant rent for public housing residents for those wage-earning participants that qualify. Tenants will continue to pay their utilities to the appropriate party.

#### MTW Local Program Participants

OHA may increase the housing assistance provided to local non-traditional programs for those wage-earning participants that qualify. These programs include Local Housing Assistance Program, Building Bridges (BB-CalWorks, BB-SRO), PACT and LHAP.

#### Non-MTW Program Participants

OHA may extend this activity to non-MTW households as permitted and pay all or a portion of the tenant portion of rent directly to the landlord for any combination of the following non-MTW program participants: mod-rehab, mainstream, VASH, FUP and shelter plus care wage earning program participants that qualify. Programs that require special permission before implementation due to funding requirements will not be implemented until permission is granted.

The program is structured so that when residents apply to participate and receive rent relief, they will be evaluated based on specific criteria and directed into one of two tracts: 1) Tract One will provide a process whereby the participant will re-pay the funds expended on their behalf either in part or full through a re-payment program 2) Tract Two will provide an option for eligible participants to meet re-payment obligations through activities such as the following but not limited to job training enrollment, community services, etc.

Under the hardship criteria, OHA will allow any household that may not be included in the rent relief population to submit the interim reexamination request in accordance with standard practices and request inclusion for rent relief even if the household does not have income from wages. Eligible participants may be determined exempt from rent relief re-payment requirements based on criteria to be determined by the Executive Director or their designee.

Self-certification is the top of the verification hierarchy through the Enterprise Income Verification (EIV) system provided by HUD. The calculation of partial or full payment of a households' rent portion is as follows:

Reported Change by Participant:      Impact to Tenant Rent Calculation

Total loss of income:                      100% of tenant rent portion may be covered by OHA

Partial loss of income:                      50% of tenant rent portion is eligible to be covered by OHA

A partial loss of income is defined to be at least 50% of income as certified through EIV and/or self-certification. If self-certification is used, the tenant will be required to sign the "Declaration under Penalty of Perjury Form" (OMB Control No. 0920-1303) to certify an income loss. In this instance, OHA will re-calculate the tenant portion based on a 50% decrease in the last adjusted income that was used to determine the tenant portion of the rent.

This option for rent relief will be presented to any participant that is scheduled for re-certification or interim recertification due to an income change during the declared disaster period and will be published on OHA's website.

The authorizations to allow OHA to adopt and implement new policies to establish rents or subsidy levels for tenant-based assistance are in Attachment C: D.2.a. Authorizations to establish new rent policies for public housing program participants in Attachment C: C.11 of the MTW Agreement.

*Update on Reactivation Plan:* OHA will continue to evaluate the feasibility of implementing this activity in FY 2025 and may decide to remove from hold based on evolving and new emergencies.

**MTW Activity #17-02: Automatic Rent Increases for HCV**

*Plan Year Approved:* 2017

*Plan Year Implemented:* 2017

*Plan Year Placed on Hold:* 2023

*Description/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 rose sharply while there was a steady exodus of owners opting to leave the program for various reasons.

To stem this tide of owners leaving the program for unassisted tenants, OHA proposes to 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. 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.

*Update on Reactivation Plan:* OHA will continue to evaluate the feasibility of implementing this activity in FY 2025 and may decide to remove from hold based on staff recruitment and changing market environments.

#### **MTW Activity #13-01: Rent Reform Pilot Program**

*Plan Year Approved:* 2013

*Plan Year Implemented:* 2013

*Plan Year Placed on Hold:* 2017

*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.

*Update on Reactivation Plan:* OHA will continue to evaluate during FY 2025.

#### **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.

*Update on Reactivation Plan:* OHA held this activity off-line as it was determined it was not needed for Oak Grove North and South dispositions. The activity will be evaluated for the disposition of Harrison Towers and may be removed from hold in FY 2025 for the disposition or the RAD conversion of public housing units at Lion Creek Crossing Phases 1-4.

#### **MTW Activity #09-02: Short-Term Subsidy Program**

*Plan Year Approved:* 2009

*Plan Year Implemented:* 2009

*Plan Year Placed on Hold:* 2015

*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.

*Update on Reactivation:* On Hold. OHA plans to reactivate this activity as needed. New projects will be thoroughly evaluated prior to making a new commitment. As OHA learns of new projects, it will reopen the activity and set new benchmarks. This activity is subject to funding availability and applicable projects. OHA has determined that funding is not available to pursue this activity

in FY 2025. However, OHA will consider activating the activity pending new opportunities in future fiscal years.

This activity may be reactivated on an as needed basis.

#### **D. Closed Out Activities**

OHA does not propose to close any activities during FY 2025.

## Section V. Sources and Uses of Funding

The FY 2025 Sources and Uses reflect the agency's vision for a capital expenditure plan to preserve OHA units for sustained occupancy. OHA has developed a Sources and Uses that sufficiently considers potential funding shortfalls and will be able to support the approved budget request and projects while maintaining adequate operating reserve levels. Due to the timing of the Plan preparation and OHA's budget planning cycle, the Sources and Uses included are a draft projection and will be finalized during OHA's Board approval and budget planning process. Final numbers will be included with the final Plan submission once OHA has a Board approved budget in June 2024. OHA will use HUD-held reserves that have been obligated and committed to various projects and activities to cover any expressed operating deficit reflected in this Sources and Uses of funding section.

### A. Planned Sources and Uses of MTW Funds

#### 1) Estimated Sources of MTW Funding for the Fiscal Year

Under MTW flexibility, OHA consolidates the public housing Operating Subsidy, the Capital Fund Program (CFP), and the Housing Choice Voucher program funding into a single fund budget. Allocations in FDS Line Item 71500 are reflected in FDS Line Item 70750 based on requests from the HUD Financial Management Division.

Table 15: Estimated Sources of MTW Funding for the Fiscal Year		
FDS Line Item	FDS Line-Item Name	Dollar Amount
70500 (70300+70400)	Total Tenant Revenue	5,214,346
70600	HUD PHA Operating grants	364064381
70610	Capital Grants	5,710,721
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	17,934,129
71100+72000	Interest Income	4,450,475
71600	Gain or Loss on Sale of Capital Assets	-
71200+71300+71310+71400+71500	Other Income	856,064
Total Revenue:		398,230,116

#### 2) Estimated Uses of MTW Funding for the Fiscal Year

At the start of FY 2025, OHA expects HCV utilization to reach just over the 90 percent threshold, and projects a steady increase in utilization due to several efforts by OHA. Owner incentive activities will continue to be expanded across all components. In addition to the implementation of new and enhanced landlord incentives, OHA plans a continued implementation of all the initiatives under Building Bridges in FY 2025. PBVs that were

conditionally awarded to existing, new or rehabilitated developments will be moved through the review process to lease up. All these efforts are aimed at maximizing the families served while the traditional HCV program adapts to serve families in the expensive and low-inventory Bay Area rental market.

OHA plans to acquire properties throughout Oakland to expend some of OHA reserves, an estimate of \$30M will be utilized with a goal to include approximately 300 units. Anticipating acquisition of properties is challenging, as the market is unpredictable, but OHA is hoping to meet the goals outlined in this plan.

What appears to be a shortfall between the Sources and Uses of MTW Funds indicated in Table 15 and Table 16, is not a shortfall, but planned uses on obligated and committed projects and expenses using reserves held for those projects and expenses. The difference is primarily due to the "Other Expenses" FDS line item, which includes MTW development obligations and capital expenditures which are described in activity #08-01 and in Appendix B and other HUD approved expenses related to Government Accounting Standard Board (GASB) 68 and 75 expenditures. OHA expects to fund the shortfall of expenses, due to its expanded incentive services and new or rehabilitated development projects, by utilizing its program reserves. The single fund budget will support increased resident services, with a focus on economic development and self-sufficiency. Additional uses will cover security and protective services for OHA properties for FY 2025.

<b>Table 16: Estimated Sources of MTW Funding for the Fiscal Year</b>		
<b>FDS Line Item</b>	<b>FDS Line-Item Name</b>	<b>Dollar Amount</b>
91000 (91100 through 91900)	Total Operating – Administrative	68,449,797
91300 + 91310 + 92000	Management Fee Expense	301,917
91810	Allocated Overhead	(14,861,360)
92500 (92100+92200+92300+92400)	Total Tenant Services	3,649,980
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	2,366,273
93500+93700	Labor	0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	14,249,175
95000 (95100+95200+95300+95500)	Total Protective Services	8,814,488
96100 (96110+96120+96130+96140)	Total insurance Premiums	1,829,610
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	2,933,100
96700 (96710+96720+96730)	Total Interest Expense and Amortization Cost	0
97100+97200	Total Extraordinary Maintenance	0
97300+97350	Housing Assistance Payments + HAP Portability-In	280,455,281

97400	Depreciation Expense	7,705,645
97500+97600+97700+97800	All Other Expenses	91,590,306
<b>Total Expenses:</b>		<b>482,125,885</b>

### 3) Activities that Will Use Only MTW Single Fund Flexibility

OHA employs single fund flexibility for the activities that enhance housing services provided under traditional programs and to adequately address needs of the local community. Through developing affordable housing, increasing resident capacity, and providing increased levels of security and public safety, OHA utilizes the single fund flexibility to extend the positive impact of MTW beyond housing. The OHA activities described below rely on the single fund flexibility and no other MTW waiver or authorization.

#### Preserving and Enhancing Our Housing Portfolio

By using single fund flexibility to create new, and rehabilitate existing, housing, OHA will increase housing choices for low-income households.

OHA continues to develop affordable housing to expand opportunities for families in need.

Current projects and initiatives in development include:

- Brooklyn Basin – OHA, in partnership with the City of Oakland and MidPen Housing Corporation, are developing 465 units, across four projects, of affordable housing for low-income families, seniors, and formerly homeless households as part of the Brooklyn Basin master planned community. The final project, Foon Lok East, will complete construction in March 2024 and is anticipating lease-up through summer 2024. Foon Lok East will contribute 124 new units (61 with PBVs) for families and will complete this significant multi-phased affordable project that is an integral part of this new community comprised of 3,100 new homes, up to 200,000 square feet of commercial space and approximately 32 acres of parks and open space along the Oakland waterfront. OHA purchased a 50% share of the four affordable parcels at Brooklyn Basin with \$10 million of MTW funds and now co-owns the land with the City of Oakland.
- 285 12<sup>th</sup> Street - OHA is partnering with the East Bay Asian Local Development Corporation (EBALDC) to construct a new affordable housing building with 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. Depending on the project's ability to secure additional financing, OHA may enter into an AHAP contract to provide PBV assistance to 16 units and HUD-VASH PBV assistance to an additional 8 units during FY 2025. OHA is also using MTW funds to provide loans to the project and will purchase the site at the beginning of construction.
- Harrison Street Master Planning and Strategic Redevelopment – In addition to 1619 / 1621 Harrison Street (OHA's headquarters and the Harrison Tower senior residence), OHA

owns five (5) parcels on Harrison Street. As a result of the strategic analysis of these sites for potential redevelopment in FY 2024, OHA will continue its internal planning discussions to determine how best to move forward with redevelopment of one or more sites in FY 2025. The site addresses are: 1801 Harrison Street, 1805 Harrison Street, 1600 Harrison Street, 1538 Harrison Street, and 1440-1500 Harrison Street.

- Mandela Station Affordable – Strategic Urban Development Alliance (SUDA) and their to-be-approved partner will be developing Mandela Station, a mixed-use transit-oriented development at the West Oakland BART station. Mandela Station includes a 240-unit affordable housing component. OHA is currently negotiating with the developers on providing a loan and PBVs to help finance the project. During FY 2025, OHA will continue negotiations with SUDA for a Development and Loan Agreement.
- The Inn at Coliseum Way, located at 4801 Coliseum Way, entails the conversion of an underutilized motel into 36 Homekey units as permanent supportive housing (plus one manager's unit). The project is a joint venture of Danco Communities and Operation Dignity. All units will target people experiencing homelessness earning no more than 30 percent AMI. Referrals to Homekey units shall be made through the Coordinated Entry System (CES) for persons who are experiencing homelessness. OHA has awarded the project a Rental Assistance Subsidy.
- The Phoenix will be located at 801 Pine Street in the West Oakland Prescott neighborhood and will be comprised of 101 total newly constructed modular units, with 49 units targeting persons who are chronically homeless. The Phoenix will also include a 7,000 square foot community building which will be home to a robust resident services program. The Phoenix is an integral part of a 316-unit mixed-income, mixed-use master plan. The Phoenix will be jointly developed and owned by East Bay Asian Local Development Corporation (EBALDC) and Allied Housing. OHA has awarded the project a Rental Assistance Subsidy.
- 3050 International is a 76-unit project (one manager's unit) sponsored by Satellite Affordable Housing Associates (SAHA) serving low-income individuals and families with 40% of units set aside for homeless households. The project is targeted to serve households between 20%-50% AMI and will consist of 1BD (28 units), 2BD (28 units), and 3BD (19 units) dwellings. The project will include ground commercial spaces for a community health clinic and cultural center owned and operated by the Native American Health Center. The health clinic will offer primary care, pediatric and women's medical services. OHA has awarded the project a Rental Assistance Subsidy.
- Foothill Family Apartments – Foothill Family Apartments, LP, is a 65-unit mixed-finance affordable housing development that is wholly owned by OHA and Oakland Housing Initiatives, a nonprofit affiliate of OHA. Foothill Family Apartments is approximately 20 years old and requires the repair and rehabilitation of the following: replacement of building systems at the end of their useful life, dry rot repairs, accessibility improvements, and

other deferred maintenance items. During FY 2025, OHA will continue working towards the final approval of the Section 18 – RAD Blend application and anticipates starting construction.

- 500 Lake Park – OHA is assisting EAH with the development of a 53-unit affordable housing development at 500 Lake Park Avenue and construction may break ground in FY 2025. The planned building, which is in the Grand Lake neighborhood, will also include 2,900 square feet of commercial space. OHA purchased the site in June 2021 using MTW funds, and it is providing loans to the project. The Authority will also provide 14 project-based VASH vouchers.
- 2700 International Blvd. is a 75-unit project (one manager's unit) sponsored by the Unity Council that will serve very low-income families and veterans experiencing homelessness with incomes between 30%-60% AMI. OHA has awarded the Unity Council 19 VASH vouchers which will be allocated to 1BD units at the 30% (17 units) and 40% (two units) AMI thresholds and a development loan. The project will have approximately 2,800 sq. ft. of community serving commercial space on the ground floor.
- 77<sup>th</sup> & Bancroft – 77<sup>th</sup> & Bancroft is a former public housing site now owned by California Affordable Housing Initiatives, an affiliate of OHA. The former apartment buildings on the property have been demolished. CAHI has selected Eden Housing and the Black Cultural Zone Community Development Corporation to develop a new affordable housing development for very low-income senior citizens on the property.
- Lakehouse – East 12<sup>th</sup> Street is a 91-unit affordable family development that is a joint venture between EBALDC, Jordan Real Estate Investments and the Unity Council. The property will serve 67 families whose incomes range are between 40% - 60% of the median income and 23 formerly homeless families and transitional-aged foster youth with a full range of supportive services. The property will also include 425 square feet of commercial space for a community-serving retail. The project is located in the Eastlake neighborhood one block away from Lake Merritt. OHA has awarded the project a development loan and a Rental Assistance Subsidy.
- Lake Merritt BART Senior Housing is a 97-unit transit-oriented affordable development for low-income and formerly homeless seniors located in Oakland's Chinatown neighborhood. The project will be constructed on BART-owned land directly over the Lake Merritt BART station and will be the first of four buildings that are part of larger-multi-phase transit-oriented development in partnership with Strada Investment Group and BART. OHA has awarded the project a Rental Assistance Subsidy.
- 2530 9<sup>th</sup> Avenue is a prospective 100% affordable new construction project on a former public housing site that is now owned by California Affordable Housing Initiatives, Inc., an affiliate of OHA. Approximately 30 units for low-income families are contemplated at the site.



- 75<sup>th</sup> and MacArthur is a prospective 100% affordable new construction project that would include approximately 145 units on a former public housing site that is owned by OHA.
- 1236 East 17<sup>th</sup> Street is a prospective 100% affordable new construction project that would include approximately 20 units on a former public housing site that is owned by OHA.
- Acquisition – OHA will seek opportunities to acquire land and existing housing in order to preserve and create new housing opportunities. Opportunities to acquire vacant land and existing buildings are unpredictable and depend on properties coming on the market or OHA negotiating with property owners for off-market sales. It is anticipated that OHA could acquire approximately three sites with approximately 300 housing units using \$40 million of MTW funds. These figures are general representations of the Authority's intent to acquire property and do not represent specific sites. At this time, OHA is pursuing two prospective acquisitions:
  - 401 Santa Clara Avenue, Oakland: An existing building located in the Grand Lake neighborhood that consists of 103-units, ample indoor and outdoor amenity spaces, and is within walking distance to high quality commercial and retail business, Lake Merritt, and high performing public schools.
  - 1888 Martin Luther King Way: A newly constructed mixed-use building that includes 88-units and approximately 2,300 square feet of ground floor commercial or building amenity space and a large rooftop deck.
- Reposition Current Assets – OHA will seek opportunities to reposition existing real estate owned by OHA in order to create new high quality housing opportunities.
- Financing & Partnerships – OHA will provide financing to new affordable housing projects throughout Oakland through a variety of selection processes:
  - *Rental Assistance Subsidy (RAS)* – OHA has a new financing program to provide subsidy to affordable housing projects that serve a minimum of 25% Extremely Low-Income households and therefore are projected to operate at a deficit. The subsidy would be capitalized and will be disbursed annually contingent upon compliance with OHA's standards and procedures. The RAS may be awarded to projects through an OHA published Notice of Funding Availability (NOFA) or one of the City of Oakland's published NOFAs, as described below. These projects are described in more detail in activity #10-06.
  - *OHA Notice of Funding Availability (OHA NOFA)* – OHA plans to release a Request for Proposals to solicit either new construction or rehabilitation projects that require acquisition, predevelopment, permanent gap funding, RAS, and/or RAD/PBV assistance with a priority for projects that serve Extremely Low-Income households and for those that can begin construction within twelve (12) months.
  - *City of Oakland Notices of Funding Availability (City NOFA)* – OHA considers possible awards of RAS or PBVs to projects that are selected for funding through City of Oakland's NOFAs. During FY2025, OHA may consider awards to projects selected by the City to apply for funding through the State of California's Homekey 4.0



program, the City's New Construction NOFA, as well as its Affordable Housing Acquisition, Rehabilitation and Naturally Occurring Affordable Housing (NOAH) Preservation Program.

### **Promoting Resident Empowerment and Self-Sufficiency**

OHA has a robust incentive program for both owners and residents and plans to expand the incentives offered based on past successes, to non-MTW voucher households. OHA also will expand the Welcome Kit incentive to additional households across traditional programs, which started with the EHV and FYI voucher families. Using this incentive program, OHA also plans to pay application fees and offer security deposit assistance of up to one month's rent to both MTW and non-MTW households.

OHA has been monitoring the backlog of rent owed by public housing residents who may have encountered difficulties during the pandemic, despite access to alternative sources of assistance. In an effort to avoid eviction, OHA plans to explore offering an employment program to a pilot group of households where income earned will be used to pay outstanding debt through repayment agreements. Additionally, OHA will explore ways to encourage employment and repayment of debts, by creating an escrow match for families enrolled in the FSS program.



During the FY, OHA is planning to pursue a collaborative venture with Alameda County to provide a mobile health care and dental care van to travel to OHA communities providing convenient and accessible on-site health care and preventative services.

In addition to these services, OHA may choose to fund EHV vouchers above the allocation limit. These families would be assisted with existing EHV services fees for supportive services until those funds expire or are expended and subsequently OHA may assist with any remaining supportive services needs including but not limited to housing navigation assistance, owner and resident incentives, security deposits and welcome kits using MTW funds.

### **Education Initiative Program Expansion**



Expansion of the Education Initiative continues to improve educational outcomes for school-aged children of resident families. The initiative has five primary goals for resident school age youth: to attend school on time every day; timely enrollment in pre-k and kindergarten; be proficient in literacy by the third grade; graduate from high school with a diploma; all students be prepared for college and/or career. The expansion of the Education Initiative is built on a “K-12 Feeder School Model,” which provides a continuum of support for children of resident families throughout their K-12 educational journey. OHA identified 12 Oakland Unified School District (OUSD) schools to scale the program in alignment with the five primary goals supported by data indicating high chronic truancy rates and academic achievement challenges.

Each school level will have a Resident Service Coordinator (RSC) to collaborate with school sites to support OHA students attending those schools. Students are enrolled after a parent completes a consent form, and RSCs will begin to coordinate services throughout the school year, which includes regular check ins with students and families, monitoring of attendance and grades, facilitation of literacy events and college readiness events/supports (through the College Corner), facilitate health and wellness school-based events and family engagement activities.

RSCs will attend a variety of school site meetings, such as: Coordination of Services Team (COST), Attendance Team, Individual Education Plans (IEP) and Student Success Team (SST). RSCs will serve as a support system for the student and their family. RSCs will be implementing grade level specific incentives to motivate students to improve attendance and academic success.

### **Out of school youth programming**

RSCs will continue to host an annual back-to-school campaign to promote attendance and academic success with a distribution of backpacks, school supplies and occasionally clothing supports coupled with case management for families in need. Additionally, RSCs will facilitate educational field trips and activities, college tours, expansion of partnerships to leverage Education Initiative supports which includes Oakland Natives Give Back, for reducing chronic absenteeism in Oakland schools - including our 12 partner schools. Community Education Partnership (CEP) is a community-based organization providing academic tutoring in English and math for resident children; the Oakland Literacy Coalition offers an annual invitation to write a mini- grant to support family literacy events; and the Boys and Girls Club facilitates a 7-days overnight summer camp experience for resident children.



### **Digital Literacy**

---

OHA continues to enhance digital literacy skill-building for participants through providing digital literacy training. OHA will expand weekly digital literacy trainings to both Learning Labs at West and East Oakland public housing sites to serve more residents. OHA plans to provide free Wi-Fi internet services at public housing developments and learning labs. OHA opened its second Learning Lab in Lockwood Gardens public housing development which is equipped with sixteen laptops with access to printers and scanners. In FY 2025, FCP will continue to provide technology training to residents to support digital literacy for adults, youth education and employment opportunities.

### **Promoting Resident Empowerment and Self-Sufficiency**

FCP's Self Sufficiency Program (FSS) received HUD approval on its updated Action Plan and has increased program enrollment. The updated Action Plan adopted a tiered escrow model to make it easy for new participants to earn escrow based on their income brackets. The FSS program is complimented by employment supports to create economic security and build savings through financial literacy and provides a pathway to the Homeownership Program.

Employment services are provided to families in West Oakland in the learning lab established utilizing the former Jobs Plus grant program. This facility serves as a hub for both online and in-person job training sessions, equipped with 16 computers to facilitate professional development opportunities, encompassing unlimited seminars and online job skill training courses for West Oakland public housing residents. FCP plans to expand our partnerships with local workforce agencies and employment training entities by leveraging use of space to provide services to OHA families.

With the Covid-19 restrictions lifted, in-person program services have been expanded; the second Learning Lab opened in East Oakland at Lockwood Gardens to provide similar employment and educational services.

Although our Learning Labs located at West and East Oakland are fully accessible and successfully serve persons with disabilities, we plan to create a resource section to include assistive technology to support those with disabilities.

FCP has dedicated full-time staff to administer economic development programming to OHA residents through job fairs, job readiness, retention training, and small business development workshops. FCP plans to scale up its small business resources program to support resident entrepreneurs and small businesses with the tools and insights to start, grow and pivot their businesses.

### **Employment Development**

The FCP employment team launched its career services program in partnership with community colleges, community-based organizations, and other training organizations, to provide vocational training to OHA participants and residents. Through vocational training opportunities residents will

have opportunities to enter employment industries to advance their careers, increasing household income.

FCP Career Services have expanded to other employment industries including Security Guard and CPR/First Aid training. FCP plans to continue working with the Bread Project, a program offering a five-week culinary training program and job placement assistance.

FCP Career Services is seeking to enhance partnerships with the College of Alameda to offer a two-day forklift training/certification course to create career opportunities in warehouse/logistics.

### **Youth Employment Program**

FCP will be issuing an RFP to continue the year-round youth employment programming currently delivered by Lao Family Services (LFS). The program is expected to offer paid employment training, job placement and educational enrollment assistance for college age youth between the ages of 16 and 24.. Youth participants currently receive training in resume writing, interview skills, workplace communication, assistance obtaining high school diplomas, or furthering their education by enrolling in college courses. Education Initiative staff will align educational supports with youth employment services creating a pipeline for youth receiving training and employment experience while achieving educational goals.

### **Homeownership**

The Homeownership Program will be supported by the FSS coordinators to enhance resident experiences by assisting participants obtain homeownership education, credit repair, money management skills, and increase financial literacy before becoming a homeowner. The program will offer quarterly homeownership education for current homeowners on maintaining their home.

The program now offers virtual Q & A sessions about the program in the evening to accommodate those that work during the day. Interested residents/participants will continue to complete the online program assessments to determine their homebuyer readiness for next steps to becoming a homeowner.

### **Search Assistance/Housing Navigator**

This initiative has a dedicated staff person to assist EHV and FYI applicants who need housing search assistance. FCP will continue to provide a monthly housing workshop to Foster Youth to Independence (FYI) voucher applicants to provide education and support around locating available rental units in Oakland. Services include rental portfolio/resume classes, assistance creating a master rental application, references, role-playing and presentation preparation, rental history review, referral to supportive services for security deposit assistance, and moving supports. FCP expanded these workshops to all voucher holders in need of housing search assistance in FY 2024, and will continue into FY 2025.

### **Lease Compliance (HQS, rental assistance)**

FCP staff will continue providing support for at-risk residents facing eviction with community resources and referrals with the goal of housing retention. Resources offered include rental and utility assistance, housekeeping counseling, intra-resident conflict mediation, employment referrals, financial education, lease violation counseling, and supportive services like food and cleaning supplies when needed. FCP works in conjunction with the Property Operations department, OHA Police Department, OAHPI, and CID to assess, triage, and support residents at OHA properties. In FY 2025, FCP plans to provide housing retention support by hosting quarterly events to proactively engage residents, provide options to request lease compliance support, and other supportive and enrichment services.

### **Food Pantry expansion (including OAHPI sites)**

FCP expanded the number of residents served by our community food pantries by adding one additional delivery food pantry for our elderly/disabled families. FCP operates two food pantries at our large public housing sites to provide fresh produce, meats, and shelf-stable food to over 200 households every month through the “Grab and Go” model. FCP has a partnership with Door Dash Delivery to expand the food pantry to serve an additional fifty (50) elderly and disabled residents at our Asset Managed and OAHPI sites. In FY 2024, FCP received a grant from the Alameda County Food Bank, allowing OHA to purchase equipment and supplies to expand the food pantry service to serve more OHA residents. In FY 2025, FCP will continue a self-select shopping method at large public housing sites, allowing more participants to shop for fresh produce, meats, and shelf-stable food items.

### **OBAR/Senior Art & Craft Program**

FCP will connect and engage the senior community with an on-site Art and Craft Program to participate in socialization activities with other seniors, aged 60 and over, from Lockwood Gardens, Palo Vista Gardens, Peralta Village, and Campbell Village. Seniors will gather to work on activities including canvas painting, adult coloring books, scrapbooking, gardening, and more. The program’s outcome intends to reduce feelings of anxiety, increase positive feelings of engagement and peace, expand seniors' creative growth, promote stress relief, bolster memory, and stimulate an optimistic attitude. In FY 2025, FCP will continue the Seniors Connect/Art & Craft Program as an on-site activity, allowing residents to participate in socialization activities with other seniors.

### **Foster Youth to Independence**

FCP will continue to work in partnership with Alameda County Social Services Agency, Beyond Emancipation and Lao Family Community Development, Inc. to assist current and former foster youth to obtain housing, education, employment, and provide case management support. OHA provides monthly housing search workshops and assistance to the Foster Youth to Independence (FYI) voucher applicants.





In addition, staff will continue to provide case management and counseling support to residents with lease compliance, education, post-move-in counseling, and financial literacy. OHA will refer FYI participants to Lao Family Community Development, Inc. which provides case management, life and career skills development, support with resume writing, interview strategies, job search, placement, and retention.

OHA will solicit five (5) FYI participants to serve as Program Advisors to provide valuable insight to the Resident Advisory Board (RAB) and OHA Leadership team to ensure FYI youth are included in resident-driven programs and initiatives.

### **New Initiatives for FY 2025**

#### **Senior Dial-A-Friend Wellness Program**

OHA plans to launch a new wellness program to engage senior residents throughout the large public housing sites, Asset Managed properties, OAHPI, and Section 8 units. OHA will enlist support of five (5) seniors to serve as volunteers to contact seniors weekly, as a peer-to-peer outreach method. In addition to serving as a wellness check for the senior residents, volunteers will market FCP programs and available services to encourage seniors to participate in onsite activities.

#### **Digital Connectors**

During FY 2025, OHA will launch the Digital Equity project, installing fiber optic cable to provide free internet access at select OHA sites. This initiative aims to alleviate financial burdens on families while ensuring they have access to high-speed internet, fostering improved connectivity and reducing the digital divide. As part of the program, OHA will extend support by providing up to \$600 per household to address unpaid internet bills, further contributing to the reduction of financial strain on families and enhancing their ability to connect in the digital landscape.

#### **Homeownership Program**

In FY 2025, all residents and participants who are work-able must be enrolled in the Family Self Sufficiency or Jobs Plus program to participate in the homeownership program.

#### **Making Moves**

In partnership with the Alameda County Public Health Department Nutrition Services will provide weekly health and wellness activities at the public housing developments.

#### **FCP Location Expansion**

FCP staff will work in the Lease Housing Department to increase engagement to provide supportive services, facilitate educational workshops, conduct program orientations and trainings.

#### **Mediation Benefits**

OHA is exploring contracting with one or more mediation organizations to offer mediation services, with in-person and virtual options. OHA intends to use existing on-site spaces as neutral in-person mediation locations for owners and tenants in conflict. This resource will be provided with the intention to increase owner retention and satisfaction. Additionally, OHA plans to utilize mediation services to provide staff trainings, as well as assist in any resident disputes. OHA will pay for up to two sessions per active HAP contract, once per year.

### **Doorbell Camera Distribution**

OHA is looking into providing doorbell cameras for families affected by violence to enhance their sense of security.

### **Provide a Consistent Level of Security to Residents with a Focus on Youth and Families**

Activities undertaken by the Oakland Housing Authority Police Department (OHAPD) are funded through single-fund flexibilities. OHAPD provides safety services to positively impact OHA sites and surrounding neighborhoods.



In FY 2025, OHAPD plans to expand the youth explorer program for up to 22 youth and continue to replace and update safety equipment and technology to maintain best business practices. OHAPD will continue to build trust and relations with a strong presence in the community by:

- Holding resident-community meetings to maintain strong partnerships;
- Hosting community building events such as the Winter Wonderland Toy Drive, bike excursions, camping trips, block parties, Coffee with a Cop, and other events;
- Building on the communication strategies with community members to understand and respond to community concerns; and
- Continue to deploy the established theories of the six pillars contained in the “21st Century Policing Report” within all levels of the OHAPD.

### **Focus on the Reduction and Deterrence of Violent Crime**

OHAPD is addressing the recent escalating crime trends and working hard to keep our communities safe and engaged in crime prevention strategies. OHAPD has many techniques to reduce and deter violent crimes, including:

- Communicating regularly with the residents and community to understand the specific challenges and collaborate to develop an appropriate response.
- Collaborate, communicate, and cooperate with all divisions and departments of OHA to create healthy and vibrant communities.
- Complete individual assessments to Crime Prevention through Environmental Design (CPTED) standards.

- Conducting thorough and complete preliminary investigations to solve crimes.
- Ensuring officers and staff have the proper training and tools to conduct research and intelligence.
- Collaboration between field operations, investigations, and communications for all members to serve a vital role in crime prevention efforts.
- Focusing on family/domestic violence, with the goal of providing critical services to victims and families in partnership with expert service providers.
- Working cooperatively with Public Safety Partners toward community safety.

### **Maintain and Increase Transparency and Resident Partnerships**

In partnership with residents, OHAPD will use tools of law enforcement to provide a safe environment at our properties as well as assist our management team in identifying challenging tenants.

A high standard of transparency and accountability is expected from police agencies, and OHAPD guarantees this by collaborating with public safety partners and engaging with the community and OHA's Resident Advisory Board (RAB). Additionally, OHAPD ensures staff performance and policies are appropriate and at, or above, the industry standard. To enhance transparency, OHAPD employs various tools such as body-worn cameras, Computer Aided Dispatch, and Record Management Systems. The department will focus partnership by actively creating and participating in advisory groups, attending community meetings and neighborhood councils, and expanding current camera monitoring and technology.



OHAPD plans to continue focusing efforts on community safety and partnerships by evaluating aspects of the Department that could be re-envisioned inside, and outside, of law enforcement responses by:

- Examining areas of OHAPD response to incidents to determine if services are better handled by a non-sworn entity or other member of OHA.
- Transitioning tasks performed by police officers to police service aides, such as noncriminal walk-in reports, as well as response to noncriminal violations that do not require a police officer's presence.
- Judicious use of technology to amplify community safety efforts.
- Implementing a community-driven process for determining how officers respond and implementing the provision of law enforcement services.
- Engaging advocacy groups in the overall strategy(s) to reduce crime, and the fear of crime and communities is necessary (i.e., Public Safety Committee).



- Adding supportive services and clinical co-responders as additional resources for OHAPD to implement harm reduction alternatives.
- Partnering with other divisions such as Office of Property Management, Leased Housing, Capital Improvements, and Family and Community Partnerships to respond holistically to the needs of our families.



### **Crisis Care Team (CCT)**

OHA plans to create and implement a Crisis Care Team (CCT) based model for responding to and assessing dispatched police calls. The model involves a mobile unit staffed with an Emergency Medical Technician and a Behavioral Health Clinician that would respond in addition to a police officer to mental health related emergency calls. Upon arrival, the officer would be able to assess the situation, and determine the appropriate level of involvement. The main objective would be to identifying the needs of the clients, and assist in transportation to a shelter, sobering center, wellness center, mental health facility or any other designation that is appropriate instead of the traditional model of transporting every client to a local emergency room or mental health facility, often using costly ambulance resources that are not always necessary.

The primary objective of this program is to support residents experiencing mental health emergencies, by providing essential services and follow up resources, facilitating transportation to medical facilities, and ultimately minimizing the necessity for police involvement in mental health crises.

OHA plans to pilot the CCT model and contract with a third party to provide the services beyond police officers and will conduct an evaluation of the program's effectiveness after a prescribed period. During FY 2025 OHA plans to procure and launch these additional services. OHA is evaluating the operational capacity and need and will elect to offer these services with limited operational hours based on OHAPD crime data, for an estimated annual cost of \$487,000, or a full-time team for around \$720,000.

### **Expansion of Affordable Housing Opportunities**

- OHA uses its single-fund flexibility to leverage additional funding for the development of new affordable housing. By using methods such as site acquisition, predevelopment loans, and gap financing, OHA is able to invest in projects to expand the availability of new housing that is affordable for families spanning multiple levels of subsidy. OHA expects to use single-fund flexibility to continue investment in existing projects in the pipeline and to broaden assistance to possible development projects like 15<sup>th</sup> and Harrison, 285 12<sup>th</sup> Street and 500 Lake Park while exploring redevelopment of some scattered sites.
- OHA will continue to explore repositioning options for several sites in the scattered site portfolio that may include a variety of strategies to meet Oakland's needs for permanent affordable housing.
- OHA may use interagency partnerships to repurpose underutilized sites to meet Oakland's need for additional permanent affordable housing.
- OHA plans to exercise its option to purchase the tax credit investor limited partners interests in Low-Income Housing Tax Credit partnerships in order to preserve affordable housing at Tassafaronga Village and Tassafaronga Village Phase 3.

### **Assist Residents forced to move due to Abatement with Relocation**

OHA plans to use the single fund flexibility to assist residents that are forced to vacate units through no fault of their own, due to failed Housing Quality Standard (HQS) inspections. Funds that are unspent by abating subsidy payments to owners that fail HQS will be allocated to assist affected residents for expenses associated with vacating the unit and moving to other assisted housing in Oakland. Eligible residents may be approved for a moving allowance to assist with costs using Uniform Relocation Allowances (URA). OHA anticipates that this use of funds will maintain and possibly increase the number of families served by supporting families in vulnerable situations where an unexpected move is forced upon them with no funding support for move related expenses. Residents will be informed through the briefing process and during abatement communications of this benefit.

### **Increased Compliance and Agency Efficiencies**

- Expand its internal audit and compliance functions to streamline processes, identify and mitigate risk and increase accuracy and timeliness of data reporting functions. These

audits and reviews will be conducted by both internal staff and external vendor consultants.

- Pay a one-time incentive payment of \$200 to residents that sign up for the online rent payment option to reduce administrative burden of rent payment processing.
- Pay a one-time incentive of \$200 for owners who sign up for direct deposit and \$100 for owners that sign up to use Owner Portal through the OHA website.

### **Rental Assistance Subsidy (RAS)**

#### **Description**

The Oakland Housing Authority's new Rental Assistance Subsidy (RAS) program offers an important and streamlined source of funding that ensures the sustainable and healthy operation of properties to serve Extremely Low-Income households at or below 30% of the Area Median Income (AMI). The Oakland Housing Authority (OHA) intends to use RAS on a case by case basis to support projects that will provide long-term affordable housing to Oakland's most vulnerable residents. The RAS is a fifteen- (15) year subsidy that aims to fill any negative net income that results primarily from minimal collectable rents from extremely low-income households.

#### **Eligible Projects**

- a) For projects with twenty-one (21) or more units, project Owners must set aside ten (10) units or 25% of the total units, whichever is greater, for households earning at or below 30% of AMI, as defined by the California Tax Credit Allocation Committee. The balance of the units in the Project may be designated for households whose incomes do not exceed 80% AMI.
- b) OHA may consider awarding a RAS to projects with twenty (20) or less units that are unable to provide the minimum number of 30% AMI units described above, at its sole discretion.
- c) Projects may entail new construction or rehabilitation.

#### **Other Program Terms**

- a) Davis Bacon Prevailing Wages: Advice by the Authority's legal counsel indicates that Davis Bacon wages should not be triggered under Section 12 of the U.S. Housing Act of 1937 because the Authority's funds will be used exclusively to fund a capitalized RAS following the completion of construction and not for any construction-related activities. However, project Owners are encouraged to seek their own independent legal advice on this issue.
- b) Section 3: Section 3 requirements of the Housing and Urban Development Act of 1968 will be included as applicable in the RAS legal agreements.

- c) Biennial Housing Quality Standards (HQS) Inspections are required for all restricted units under the Regulatory Agreement. As needed, inspections may be conducted more frequently based on complaints, comments or City citations received.
- d) All projects would be required to adhere to NEPA requirements.
- e) Projects may be subject to subsidy layering reviews based on additional funding sources.

OHA may opt to use RAS funding in conjunction with PBV or RAD PBV awards. These projects will have to meet NEPA and HQS requirements and pass any subsidy layering reviews that may be required by layered funding sources. Projects slated to use this funding are described in detail in activity #10-06, including Coliseum Way, The Phoenix, 3050 International Blvd., Lakehouse – East 12<sup>th</sup> Street, Lake Merritt BART Senior, and projects anticipated to apply through OHA’s RFP process.

Table 17: Planned Use of MTW Single Fund Flexibility
Narrative of planned Activities that use only the MTW single fund flexibility.
<p>OHA employs single fund flexibility for the activities that enhance housing services provided under traditional programs and to adequately address the needs of the local community. Through developing affordable housing, increasing resident capacity, and providing increased levels of security and public safety, OHA utilizes the single fund flexibility to extend the positive impact of MTW beyond housing. The OHA activities described below rely on the single fund flexibility and no other MTW waiver or authorization.</p>
<p><u>Promoting Resident Empowerment and Self-Sufficiency</u></p> <p>OHA has a robust incentive program for both owners and residents and plans to expand the incentives offered based on past successes, including an expansion of the existing owner incentives to non-MTW voucher households. OHA plans to expand the Welcome Kit incentive to additional households across traditional programs, which started with the EHV and FYI voucher families. Using this incentive program, OHA also plans to pay application fees and offer security deposit assistance of up to one month’s rent to both MTW and non-MTW households.</p> <p>OHA has been monitoring the backlog of rent owed by public housing residents who may have encountered difficulties during the pandemic, despite access to alternative sources of assistance. In an effort to avoid eviction, OHA plans to explore offering an employment program to a pilot group of households where income earned will be used to pay outstanding debt through repayment agreements. Additionally, OHA will explore ways to encourage employment and repayment of debts, by creating an escrow match for families enrolled in the FSS program.</p> <p>During the FY, OHA is planning to pursue a collaborative venture with Alameda County to provide a mobile health care and dental care van to travel to OHA communities providing convenient and accessible on-site health care and preventative services.</p> <p>In addition to these services, OHA may choose to fund EHV vouchers above the allocation limit. These families would be assisted with existing EHV services fees for supportive services until those funds expire or are expended and subsequently OHA may assist with any remaining supportive services needs including but not limited to housing navigation assistance, owner and resident incentives, security deposits and welcome kits using MTW funds.</p> <p><u>Education Initiative Program Expansion</u></p> <p>Expansion of the Education Initiative continues to improve educational outcomes for school-aged children of resident families. The initiative has five primary goals for resident school age youth: to attend school on time every day; timely enrollment in pre-k and kindergarten; be proficient in literacy by the third grade; graduate from high school with a diploma; all students be prepared for college and/or career. The expansion of the Education Initiative is built on a</p>

"K-12 Feeder School Model," which provides a continuum of support for children of resident families throughout their K-12 educational journey. OHA identified 12 Oakland Unified School District (OUSD) schools to scale the program in alignment with the five primary goals supported by data indicating high chronic truancy rates and academic achievement challenges.

Each school level will have a Resident Service Coordinator (RSC) to collaborate with school sites to support OHA students attending those schools. Students are enrolled after a parent completes a consent form, and RSCs will begin to coordinate services throughout the school year, which includes regular check ins with students and families, monitoring of attendance and grades, facilitation of literacy events and college readiness events/supports (through the College Corner), facilitate health and wellness school-based events and family engagement activities.

RSCs will attend a variety of school site meetings, such as: Coordination of Services Team (COST), Attendance Team, Individual Education Plans (IEP) and Student Success Team (SST). RSCs will serve as a support system for the student and their family. RSCs will be implementing grade level specific incentives to motivate students to improve attendance and academic success.

#### Out of School Youth Programming

RSCs will continue to host an annual back-to-school campaign to promote attendance and academic success with a distribution of backpacks, school supplies and occasionally clothing supports coupled with case management for families in need. Additionally, RSCs will facilitate educational field trips and activities, college tours, expansion of partnerships to leverage Education Initiative supports which includes Oakland Natives Give Back, for reducing chronic absenteeism in Oakland schools - including our 12 partner schools. Community Education Partnership (CEP) is a community-based organization providing academic tutoring in English and math for resident children; the Oakland Literacy Coalition offers an annual invitation to write a mini- grant to support family literacy events; and the Boys and Girls Club facilitates a 7-days overnight summer camp experience for resident children.

#### Digital Literacy

OHA continues to enhance digital literacy skill-building for participants through providing digital literacy training. OHA will expand weekly digital literacy trainings to both Learning Labs at West and East Oakland public housing sites to serve more residents. OHA plans to provide free Wi-Fi internet services at public housing developments and learning labs. OHA opened its second Learning Lab in Lockwood Gardens public housing development which is equipped with sixteen laptops with access to printers and scanners. In FY 2025, FCP will continue to provide technology training to residents to support digital literacy for adults, youth education and employment opportunities.

#### Promoting Resident Empowerment and Self-Sufficiency

FCP's Self Sufficiency Program (FSS) received HUD approval on its updated Action Plan and has increased program enrollment. The updated Action Plan adopted a tiered escrow model to make it easy for new participants to earn escrow based on their income brackets. The FSS program is complimented by employment supports to create economic security and build savings through financial literacy and provides a pathway to the Homeownership Program.

Employment services are provided to families in West Oakland in the learning lab established utilizing the former Jobs Plus grant program. This facility serves as a hub for both online and in-person job training sessions, equipped with 16 computers to facilitate professional development opportunities, encompassing unlimited seminars and online job skill training courses for West Oakland public housing residents. FCP plans to expand our partnerships with local workforce agencies and employment training entities by leveraging use of space to provide services to OHA families.

With the Covid-19 restrictions lifted, in-person program services have been expanded; the second Learning Lab opened in East Oakland at Lockwood Gardens to provide similar employment and educational services.

Although our Learning Labs located at West and East Oakland are fully accessible and successfully serve persons with disabilities, we plan to create a resource section to include assistive technology to support those with disabilities.

FCP has dedicated full-time staff to administer economic development programming to OHA residents through job fairs, job readiness, retention training, and small business development workshops. FCP plans to scale up its small business resources program to support resident entrepreneurs and small businesses with the tools and insights to start, grow and pivot their businesses.

#### Employment Development

The FCP employment team launched its career services program in partnership with community colleges, community-based organizations, and other training organizations, to provide vocational training to OHA participants and residents. Through vocational training opportunities residents will have opportunities to enter employment industries to advance their careers, increasing household income.

FCP Career Services have expanded to other employment industries including Security Guard and CPR/First Aid training. FCP plans to continue working with the Bread Project, a program offering a five-week culinary training program and job placement assistance.

FCP Career Services is seeking to enhance partnerships with the College of Alameda to offer a two-day forklift training/certification course to create career opportunities in warehouse/logistics.

#### Youth Employment Program

FCP will be issuing an RFP to continue the year-round youth employment programming currently delivered by Lao Family Services (LFS). The program is expected to offer paid employment training, job placement and educational enrollment assistance for college age youth between the ages of 16 and 24. Youth participants currently receive training in resume writing, interview skills, workplace communication, assistance obtaining high school diplomas, or furthering their education by enrolling in college courses. Education Initiative staff will align educational supports with youth employment services creating a pipeline for youth receiving training and employment experience while achieving educational goals.

#### Homeownership

The Homeownership Program will be supported by the FSS coordinators to enhance resident experiences by assisting participants obtain homeownership education, credit repair, money management skills, and increase financial literacy before becoming a homeowner. The program will offer quarterly homeownership education for current homeowners on maintaining their home.

The program now offers virtual Q & A sessions about the program in the evening to accommodate those that work during the day. Interested residents/participants will continue to complete the online program assessments to determine their homebuyer readiness for next steps to becoming a homeowner.

#### Search Assistance/Housing Navigator

This initiative has a dedicated staff person to assist EHV and FYI applicants who need housing search assistance. FCP will continue to provide a monthly housing workshop to Foster Youth to Independence (FYI) voucher applicants to provide education and support around locating available rental units in Oakland. Services include rental portfolio/resume classes, assistance creating a master rental application, references, role-playing and presentation preparation, rental history review, referral to supportive services for security deposit assistance, and moving supports. FCP expanded these workshops to all voucher holders in need of housing search assistance in FY 2024 and will continue into FY 2025.

#### Lease Compliance (HQS, rental assistance)

FCP staff will continue providing support for at-risk residents facing eviction with community resources and referrals with the goal of housing retention. Resources offered include rental and utility assistance, housekeeping counseling, intra-resident conflict mediation, employment referrals, financial education, lease violation counseling, and



supportive services like food and cleaning supplies when needed. FCP works in conjunction with the Property Operations department, OHA Police Department, OAHPI, and CID to assess, triage, and support residents at OHA properties. In FY 2025, FCP plans to provide housing retention support by hosting quarterly events to proactively engage residents, provide options to request lease compliance support, and other supportive and enrichment services.

#### Food Pantry expansion (including OAHPI sites)

FCP expanded the number of residents served by our community food pantries by adding one additional delivery food pantry for our elderly/disabled families. FCP operates two food pantries at our large public housing sites to provide fresh produce, meats, and shelf-stable food to over 200 households every month through the “Grab and Go” model. FCP has a partnership with Door Dash Delivery to expand the food pantry to serve an additional fifty (50) elderly and disabled residents at our Asset Managed and OAHPI sites. In FY 2024, FCP received a grant from the Alameda County Food Bank, allowing OHA to purchase equipment and supplies to expand the food pantry service to serve more OHA residents. In FY 2025, FCP will continue a self-select shopping method at large public housing sites, allowing more participants to shop for fresh produce, meats, and shelf-stable food items.

#### OBAR/Senior Art & Craft Program

FCP will connect and engage the senior community with an on-site Art and Craft Program to participate in socialization activities with other seniors, aged 60 and over, from Lockwood Gardens, Palo Vista Gardens, Peralta Village, and Campbell Village. Seniors will gather to work on activities including canvas painting, adult coloring books, scrapbooking, gardening, and more. The program’s outcome intends to reduce feelings of anxiety, increase positive feelings of engagement and peace, expand seniors’ creative growth, promote stress relief, bolster memory, and stimulate an optimistic attitude. In FY 2025, FCP will continue the Seniors Connect/Art & Craft Program as an on-site activity, allowing residents to participate in socialization activities with other seniors.

#### Foster Youth to Independence

FCP will continue to work in partnership with Alameda County Social Services Agency, Beyond Emancipation and Lao Family Community Development, Inc. to assist current and former foster youth to obtain housing, education, employment, and provide case management support. OHA provides monthly housing search workshops and assistance to the Foster Youth to Independence (FYI) voucher applicants.

In addition, staff will continue to provide case management and counseling support to residents with lease compliance, education, post-move-in counseling, and financial literacy. OHA will refer FYI participants to Lao Family Community Development, Inc. which provides case management, life and career skills development, support with resume writing, interview strategies, job search, placement, and retention.

OHA will solicit five (5) FYI participants to serve as Program Advisors to provide valuable insight to the Resident Advisory Board (RAB) and OHA Leadership team to ensure FYI youth are included in resident-driven programs and initiatives.

#### **New Initiatives for FY 2025**

##### **Senior Dial-A-Friend Wellness Program**

OHA plans to launch a new wellness program to engage senior residents throughout the large public housing sites, Asset Managed properties, OAHPI, and Section 8 units. OHA will enlist support of five (5) seniors to serve as volunteers to contact seniors weekly, as a peer-to-peer outreach method. In addition to serving as a wellness check for the senior residents, volunteers will market FCP programs and available services to encourage seniors to participate in onsite activities.

##### **Digital Connectors**

During FY 2025, OHA will launch the Digital Equity project, installing fiber optic cable to provide free internet access at select OHA sites. This initiative aims to alleviate financial burdens on families while ensuring they have access to high-speed internet, fostering improved connectivity and reducing the digital divide. As part of the program, OHA will

extend support by providing up to \$600 per household to address unpaid internet bills, further contributing to the reduction of financial strain on families and enhancing their ability to connect in the digital landscape.

#### **Homeownership Program**

In FY 2025, all residents and participants who are work-able must be enrolled in the Family Self Sufficiency or Jobs Plus program to participate in the homeownership program.

#### **Making Moves**

In partnership with the Alameda County Public Health Department Nutrition Services will provide weekly health and wellness activities at the public housing developments.

#### **FCP Location Expansion**

FCP staff will work in the Lease Housing Department to increase engagement to provide supportive services, facilitate educational workshops, conduct program orientations and trainings.

#### **Mediation Benefits**

OHA is exploring contracting with one or more mediation organizations to offer mediation services, with in-person and virtual options. OHA intends to use existing on-site spaces as neutral in-person mediation locations for owners and tenants in conflict. This resource will be provided with the intention to increase owner retention and satisfaction. Additionally, OHA plans to utilize mediation services to provide staff trainings, as well as assist in any resident disputes. OHA will pay for up to two sessions per active HAP contract, once per year.

#### **Doorbell Camera Distribution**

OHA is looking into providing doorbell cameras for families affected by violence to enhance their sense of security.

#### **Provide a Consistent Level of Security to Residents with a Focus on Youth and Families**

Activities undertaken by the Oakland Housing Authority Police Department (OHAPD) are funded through single-fund flexibilities. OHAPD provides safety services to positively impact OHA sites and surrounding neighborhoods.

In FY 2025, OHAPD plans to expand the youth explorer program for up to 22 youth and continue to replace and update safety equipment and technology to maintain best business practices. OHAPD will continue to build trust and relations with a strong presence in the community by:

- Holding resident-community meetings to maintain strong partnerships;
- Hosting community building events such as the Winter Wonderland Toy Drive, bike excursions, camping trips, block parties, Coffee with a Cop, and other events;
- Building on the communication strategies with community members to understand and respond to community concerns; and
- Continue to deploy the established theories of the six pillars contained in the “21st Century Policing Report” within all levels of the OHAPD.

#### **Focus on the Reduction and Deterrence of Violent Crime**

OHAPD is addressing the recent escalating crime trends and work hard to keep our communities safe and engaged in crime prevention strategies. OHAPD has many techniques to reduce and deter violent crimes, including:

- Communicating regularly with the residents and community to understand the specific challenges and collaborate to develop an appropriate response.
- Collaborate, communicate, and cooperate with all divisions and departments of OHA to create healthy and vibrant communities.
- Complete individual assessments to Crime Prevention through Environmental Design (CPTED) standards.
- Conducting thorough and complete preliminary investigations to solve crimes.
- Ensuring officers and staff have the proper training and tools to conduct research and intelligence.
- Collaboration between field operations, investigations, and communications for all members to serve a vital role in crime prevention efforts.
- Focusing on family/domestic violence, with the goal of providing critical services to victims and families in partnership with expert service providers.
- Working cooperatively with Public Safety Partners toward community safety.

#### **Maintain and Increase Transparency and Resident Partnerships**



In partnership with residents, OHAPD will use tools of law enforcement to provide a safe environment at our properties as well as assist our management team in identifying challenging tenants.

A high standard of transparency and accountability is expected from police agencies, and OHAPD guarantees this by collaborating with public safety partners and engaging with the community and OHA's Resident Advisory Board (RAB). Additionally, OHAPD ensures staff performance and policies are appropriate and at, or above, the industry standard. To enhance transparency, OHAPD employs various tools such as body-worn cameras, Computer Aided Dispatch, and Record Management Systems. The department will focus partnership by actively creating and participating in advisory groups, attending community meetings and neighborhood councils, and expanding current camera monitoring and technology.

OHAPD plans to continue focusing efforts on community safety and partnerships by evaluating aspects of the Department that could be re-envisioned inside, and outside, of law enforcement responses by:

- Examining areas of OHAPD response to incidents to determine if services are better handled by a non-sworn entity or other member of OHA.
- Transitioning tasks performed by police officers to police service aides, such as noncriminal walk-in reports, as well as response to noncriminal violations that do not require a police officer's presence.
- Judicious use of technology to amplify community safety efforts.
- Implementing a community-driven process for determining how officers respond and implementing the provision of law enforcement services.
- Engaging advocacy groups in the overall strategy(s) to reduce crime, and the fear of crime and communities is necessary (i.e., Public Safety Committee).
- Adding supportive services and clinical co-responders as additional resources for OHAPD to implement harm reduction alternatives.

Partnering with other divisions such as Office of Property Management, Leased Housing, Capital Improvements, and Family and Community Partnerships to respond holistically to the needs of our families.

#### **Crisis Care Team (CCT)**

OHA plans to create and implement a Crisis Care Team (CCT) based model for responding to and assessing dispatched police calls. The model involves a mobile unit staffed with an Emergency Medical Technician and a Behavioral Health Clinician that would respond in addition to a police officer to mental health related emergency calls. Upon arrival, the officer would be able to assess the situation, and determine the appropriate level of involvement. The main objective would be to identifying the needs of the clients, and assist in transportation to a shelter, sobering center, wellness center, mental health facility or any other designation that is appropriate instead of the traditional model of transporting every client to a local emergency room or mental health facility, often using costly ambulance resources that are not always necessary.

The primary objective of this program is to support residents experiencing mental health emergencies, by providing essential services and follow up resources, facilitating transportation to medical facilities, and ultimately minimizing the necessity for police involvement in mental health crises.

OHA plans to pilot the CCT model and contract with a third party to provide the services beyond police officers and will conduct an evaluation of the program's effectiveness after a prescribed period. During FY 2025 OHA plans to procure and launch these additional services. OHA is evaluating the operational capacity and need and will elect to offer these services with limited operational hours based on OHAPD crime data, for an estimated annual cost of \$487,000, or a full-time team for around \$720,000.

#### **Expansion of Affordable Housing Opportunities**

OHA uses its single-fund flexibility to leverage additional funding for the development of new affordable housing. By using methods such as site acquisition, predevelopment loans, and gap financing, OHA is able to invest in projects

to expand the availability of new housing that is affordable for families spanning multiple levels of subsidy. OHA expects to use single-fund flexibility to continue investment in existing projects in the pipeline and to broaden assistance to possible development projects like 15<sup>th</sup> and Harrison, 285 12<sup>th</sup> Street and 500 Lake Park while exploring redevelopment of some scattered sites.

- OHA will continue to explore repositioning options for several sites in the scattered site portfolio that may include a variety of strategies to meet Oakland's needs for permanent affordable housing.
- OHA may use interagency partnerships to repurpose underutilized sites to meet Oakland's need for additional permanent affordable housing.
- OHA plans to exercise its option to purchase the tax credit investor limited partners interests in Low-Income Housing Tax Credit partnerships in order to preserve affordable housing at Tassafaronga Village and Tassafaronga Village Phase 3.

#### Assist Residents forced to move due to Abatement with Relocation

OHA plans to use the single fund flexibility to assist residents that are forced to vacate units through no fault of their own, due to failed Housing Quality Standard (HQS) inspections. Funds that are unspent by abating subsidy payments to owners that fail HQS will be allocated to assist affected residents for expenses associated with vacating the unit and moving to other assisted housing in Oakland. Eligible residents may be approved for a moving allowance to assist with costs using Uniform Relocation Allowances (URA). OHA anticipates that this use of funds will maintain and possibly increase the number of families served by supporting families in vulnerable situations where an unexpected move is forced upon them with no funding support for move related expenses. Residents will be informed through the briefing process and during abatement communications of this benefit.

#### Increased Compliance and Agency Efficiencies

- Expand its internal audit and compliance functions to streamline processes, identify and mitigate risk and increase accuracy and timeliness of data reporting functions. These audits and reviews will be conducted by both internal staff and external vendor consultants.
- Pay a one-time incentive payment of \$200 to residents that sign up for the online rent payment option to reduce administrative burden of rent payment processing.
- Pay a one-time incentive of \$200 for owners who sign up for direct deposit and \$100 for owners that sign up to use Owner Portal through the OHA website.

#### Rental Assistance Subsidy (RAS)

##### Description

The Oakland Housing Authority's new Rental Assistance Subsidy (RAS) program offers an important and streamlined source of funding that ensures the sustainable and healthy operation of properties to serve Extremely Low-Income households at or below 30% of the Area Median Income (AMI). The Oakland Housing Authority (OHA) intends to use RAS on a case by case basis to support projects that will provide long-term affordable housing to Oakland's most vulnerable residents. The RAS is a fifteen (15) year subsidy that aims to fill any negative net income that results primarily from minimal collectable rents from extremely low-income households.

##### Eligible Projects

- d) For projects with twenty-one (21) or more units, project Owners must set aside ten (10) units or 25% of the total units, whichever is greater, for households earning at or below 30% of AMI, as defined by the California Tax Credit Allocation Committee. The balance of the units in the Project may be designated for households whose incomes do not exceed 80% AMI.
- e) OHA may consider awarding a RAS to projects with twenty (20) or less units that are unable to provide the minimum number of 30% AMI units described above, at its sole discretion.
- f) Projects may entail new construction or rehabilitation.

##### Other Program Terms

- f) Davis Bacon Prevailing Wages: Advice by the Authority's legal counsel indicates that Davis Bacon wages should not be triggered under Section 12 of the U.S. Housing Act of 1937 because the Authority's funds will be used exclusively to fund a capitalized RAS following the completion of construction and not for any

construction-related activities. However, project Owners are encouraged to seek their own independent legal advice on this issue.

- g) Section 3: Section 3 requirements of the Housing and Urban Development Act of 1968 will be included as applicable in the RAS legal agreements.
- h) Biennial Housing Quality Standards (HQS) Inspections are required for all restricted units under the Regulatory Agreement. As needed, inspections may be conducted more frequently based on complaints, comments or City citations received.
- i) All projects would be required to adhere to NEPA requirements.
- j) Projects may be subject to subsidy layering reviews based on additional funding sources.

OHA may opt to use RAS funding in conjunction with PBV or RAD PBV awards. These projects will have to meet NEPA and HQS requirements and pass any subsidy layering reviews that may be required by layered funding sources. Projects slated to use this funding are described in detail in activity #10-06, including Coliseum Way, The Phoenix, 3050 International Blvd., Lakehouse – East 12<sup>th</sup> Street, Lake Merritt BART Senior, and projects anticipated to apply through OHA's RFP process.

#### 4) Planned Application of OHA Unspent Operating Fund and HCV Funding

Table 18: Planned Application of OHA Unspent Operating Fund and HCV Funding		
Original Funding Source	Beginning of FY - Unspent Balances	Planned Application of PHA Unspent Funds during FY
HCV HAP*	\$79,983,403	\$49,855,000
HCV Admin Fee	\$0	\$0
PH Operating Subsidy	\$12,054,325	\$12,054,325
<b>Total Revenue:</b>	<b>\$92,037,728</b>	<b>\$61,909,325</b>
<p>Description:</p> <p>Through use of the single fund flexibility made possible by MTW, OHA projects to spend approximately \$67.1 million of its reserves on capital projects. Approximately, \$9.7 million will be invested in public housing property improvements. OHA expects to complete projects that will preserve and enhance each of its public housing sites, investing in site improvements, modernization of building systems and infrastructure and rehabilitation of unit interiors.</p> <p>OHA anticipates expending \$8.9 M on exterior and interior building improvements at six OHA administrative offices including Harrison Street and the Service Center.</p> <p>OHA will also use approximately \$4.4 M of reserve funds to purchase new information technology network security software and hardware, vehicles, security equipment for administrative sites and properties, and office equipment.</p>		

Through use of the single fund flexibility made possible by MTW, OHA projects to spend approximately \$67.1 million of its reserves on capital projects. Approximately, \$9.7 million will be invested in public housing property improvements. OHA expects to complete projects that will preserve and enhance each of its public housing sites, investing in site

improvements, modernization of building systems and infrastructure and rehabilitation of unit interiors.

OHA anticipates expending \$8.9 M on exterior and interior building improvements at six OHA administrative offices including Harrison Street and the Service Center.

OHA will also use approximately \$4.4 M of reserve funds to purchase new information technology network security software and hardware, vehicles, security equipment for administrative sites and properties, and office equipment.

## B. Local Asset Management Plan

Table 20: 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?	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 the 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 does not plan to make any changes in the Plan Year.	OHA does not plan to make any changes in the Plan Year.

## C. Rental Assistance Demonstration Participation

Table 21: Rental Assistance Demonstration (RAD) Participation		
Description: OHA plans to submit an application during the FY to convert public housing units in the following mixed finance developments: Lion Creek Crossing Phases I, II, III and IV, and Foothill Family Apartments – totaling 178 units. Upon approval of the application, OHA plans to complete the RAD and/or RAD/Section 18 blend conversion within 6 months. Due to timing of application submission/approval, OHA may not complete the conversions during the FY.		
i.	Has the MTW PHA submitted a RAD Significant Amendment in the appendix? A RAD Significant Amendment should only be included if it is a new or amended version that requires HUD approval.	Yes
ii.	If the MTW PHA has provided a RAD Significant Amendment in the appendix, please state whether it is the first RAD Significant Amendment submitted or describe any proposed changes from the prior RAD Significant Amendment?	Updated RAD Significant Amendment
The RAD Significant Amendment in Appendix L includes updates to the prior RAD Significant Amendment that was included in the 2021 MTW Plan. Updates include		

plans for RAD/Section 18 blends, statement of impact of the conversion on OHA's Capital Fund budget and plans to temporarily relocate some or all of the residents.	
---	--

## Section VI. Administrative

### **A. Resolution signed by the Board of Commissioners adopting the Annual MTW Plan Certification of Compliance**

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

On Motion of Commissioner: Jenny Castillo

Seconded by Commissioner: Lynette Jung-Lee

And approved by the following vote:

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

NAYS: 0

ABSTAIN: 0

ABSENT: 0

EXCUSED: Montgomery, Tortorich, Hartwig

**THE FOLLOWING RESOLUTION WAS ADOPTED: March 18, 2024  
RESOLUTION NUMBER: #5238**

**RESOLUTION AUTHORIZING THE EXECUTIVE DIRECTOR TO SUBMIT  
THE FISCAL YEAR 2025 MAKING TRANSITIONS WORK ANNUAL  
PLAN AND CERTIFICATIONS OF COMPLIANCE TO THE US  
DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT**

WHEREAS, the Oakland Housing Authority Board of Commissioners is required to submit to the U.S. Department of Housing and Urban Development (Department) a "Moving to Work" (MTW) Annual Plan; and

WHEREAS, the Oakland Housing Authority (Authority) named its local MTW Program "Making Transitions Work"; and

WHEREAS, the Fiscal Year (FY) 2025 MTW Annual Plan provides Authority residents, the public and the Department with baseline information on Authority programs, previously approved MTW activities, and a budget for FY 2025; and

WHEREAS, the FY 2025 MTW Annual Plan identifies the areas in which the Authority intends to use its participation in MTW to explore and test new and innovative methods to reduce costs and achieve greater cost effectiveness, provide incentives for families with children to become economically self-sufficient, and increase housing choices for low-income families in Oakland; and

WHEREAS, the Authority gathered resident and community input during a 30-day written comment period and a public hearing held on February 26, 2024; and  
WHEREAS, the FY 2025 MTW Annual Plan was finalized after giving consideration to comments received from the Resident Advisory Board meeting held on February 14 and comments received from the public; and

WHEREAS, the Board of Commissioners must adopt a FY 2025 MTW Annual Plan prior to submission to the Department; and

WHEREAS, the Certifications of Compliance with the MTW requirements must be included with the MTW Annual Plan; and

WHEREAS, the Certification states that the FY 2025 MTW Annual Plan will be carried out in compliance with all applicable MTW regulations and requirements of the Department; and

WHEREAS, the FY 2025 MTW Annual Plan is in compliance with all Department regulations.

**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 adopts the FY 2025 MTW Annual Plan; and

THAT, the Chair of the Board of Commissioners is authorized to certify that the Oakland Housing Authority will comply with all regulations as stated in the Certifications of Compliance; and

THAT, the Executive Director, on behalf of the Authority, is hereby authorized to submit the FY 2025 MTW Annual Plan and Certifications of Compliance to the US Department of Housing and Urban Development, and 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 March 18, 2024.*

\_\_\_\_\_  
*Patricia Wells*

\_\_\_\_\_  
Secretary

**ADOPTED: March 18, 2024**

**RESOLUTION NO. #5238**



## CERTIFICATIONS OF COMPLIANCE

### U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT OFFICE OF PUBLIC AND INDIAN HOUSING

#### Certifications of Compliance with Regulations: Board Resolution to Accompany the Annual Moving to Work Plan

Acting on behalf of the Board of Commissioners of the Moving to Work Public Housing Agency (MTW PHA) listed below, as its Chairman or other authorized MTW PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the MTW PHA Plan Year beginning (07/01/2024), hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

- (1) The MTW PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the MTW PHA conducted a public hearing to discuss the Plan and invited public comment.
- (2) The MTW PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan.
- (3) The MTW PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1 (or successor form as required by HUD).
- (4) The MTW PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
- (5) The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
- (6) The Plan contains a certification by the appropriate state or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the MTW PHA's jurisdiction and a description of the manner in which the Plan is consistent with the applicable Consolidated Plan.
- (7) The MTW PHA will affirmatively further fair housing by fulfilling the requirements at 24 CFR 903.7(o) and 24 CFR 903.15(d), which means that it will take meaningful actions to further the goals identified in the Assessment of Fair Housing (AFH) conducted in accordance with the requirements of 24 CFR 5.150 through 5.180, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR 903.7(o)(3). Until such time as the MTW PHA is required to submit an AFH, and that AFH has been accepted by HUD, the MTW PHA will address impediments to fair housing choice identified in the Analysis of Impediments to fair housing choice associated with any applicable Consolidated or Annual Action Plan under 24 CFR Part 91.
- (8) The MTW PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
- (9) In accordance with 24 CFR 5.105(a)(2), HUD's Equal Access Rule, the MTW PHA will not make a determination of eligibility for housing based on sexual orientation, gender identity, or marital status and will make no inquiries concerning the gender identification or sexual orientation of an applicant for or occupant of HUD-assisted housing.
- (10) The MTW PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
- (11) The MTW PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low- or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
- (12) The MTW PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
- (13) The MTW PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.
- (14) The MTW PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.

HUD FORM 50900: Certifications of Compliance

- (15) The MTW PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
- (16) The MTW PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the MTW PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.
- (17) With respect to public housing and applicable local, non-traditional development the MTW PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
- (18) The MTW PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
- (19) The MTW PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
- (20) The MTW PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 200.
- (21) The MTW PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
- (22) All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the MTW PHA in its Plan and will continue to be made available at least at the primary business office of the MTW PHA.

Oakland Housing Authority  
MTW PHA NAME

CA003  
MTW PHA NUMBER/HA CODE

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

Anne Griffith  
Name of Authorized Official

Chair, OHA Board of Commissioners  
Title

SIGNATURE

DATE

\* Must be signed by either the Chairman or Secretary of the Board of the MTW PHA's legislative body. This certification cannot be signed by an employee unless authorized by the MTW PHA Board to do so. If this document is not signed by the Chairman or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.

HUD FORM 50900: Certifications of Compliance

**B. Dates the Annual MTW Plan was made available for public review**

<b>Beginning of Public Comment Period</b>	<b>February 2, 2024</b>	
<b>Notification sent to Community Partners</b>	<b>February 22, 2024</b>	
<b>Public Notice Published in Oakland Tribune</b>	<b>February 16, 2024</b>	
<b>Public Hearing at 1619 Harrison Street</b>	<b>February 26, 2024</b>	<b>Conducted via Zoom and in person</b>
<b>Resident Advisory Board Meetings</b>	<b>February 14 and March 13, 2024</b>	<b>Conducted via Zoom and in person</b>
<b>End of Public Comment Period</b>	<b>March 6, 2023</b>	

**C. Description of any planned or ongoing Agency-directed evaluations of the demonstration**

**D. Lobbying Disclosures**

**DISCLOSURE OF LOBBYING ACTIVITIES**

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

Approved by OMB  
4040-0013

<b>1. * Type of Federal Action:</b> <input type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	<b>2. * Status of Federal Action:</b> <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	<b>3. * Report Type:</b> <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
<b>4. Name and Address of Reporting Entity:</b> <input checked="" type="checkbox"/> Prime <input type="checkbox"/> SubAwardee * Name: <u>Oakland Housing Authority</u> * Street 1: <u>1619 Harrison Street</u> Street 2: _____ * City: <u>Oakland</u> State: <u>California</u> Zip: <u>94612</u> Congressional District, if known: <u>CA 13</u>		
<b>5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:</b>   		
<b>6. * Federal Department/Agency:</b> <u>US Dept. of Housing and Urban Development</u>		<b>7. * Federal Program Name/Description:</b> <u>Moving to Work Demonstration</u> CFDA Number, if applicable: <u>14.881</u>
<b>8. Federal Action Number, if known:</b> <u>N/A</u>		<b>9. Award Amount, if known:</b> \$ _____
<b>10. a. Name and Address of Lobbying Registrant:</b> Prefix: _____ * First Name: <u>N/A</u> Middle Name: _____ * Last Name: _____    Suffix: _____ * Street 1: _____    Street 2: _____ * City: _____    State: _____    Zip: _____		
<b>b. Individual Performing Services</b> (including address if different from No. 10a) Prefix: _____ * First Name: _____    Middle Name: _____ * Last Name: _____    Suffix: _____ * Street 1: _____    Street 2: _____ * City: _____    State: _____    Zip: _____		
<b>11.</b> Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure. <b>* Signature:</b> <u>Patricia Wells</u> <b>* Name:</b> Prefix: <u>Ms</u> * First Name: <u>Patricia</u> Middle Name: _____ * Last Name: <u>Wells</u> Suffix: _____ <b>Title:</b> <u>Executive Director</u> <b>Telephone No.:</b> <u>510-874-1517</u> <b>Date:</b> <u>1/10/2024</u>		
<b>Federal Use Only:</b>		Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)

DocuSign Envelope ID: DE9F5536-FB4A-4139-BECD-9C811BBC935B

**Certification of Payments  
to Influence Federal Transactions****Department of Housing  
and Urban Development  
Office of Public and Indian Housing**

Public reporting burden for this information collection is estimated to average 30 minutes. This includes the time for collecting, reviewing, and reporting data. The information requested is required to obtain a benefit. This form is used to ensure federal funds are not used to influence members of Congress. There are no assurances of confidentiality. HUD may not conduct or sponsor, and an applicant is not required to respond to a collection of information unless it displays a currently valid OMB control number.

Applicant Name

Oakland Housing Authority

Program/Activity Receiving Federal Grant Funding

Public Housing Operating Fund Grant

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

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

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

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

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

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

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

Name of Authorized Official

Patricia Wells

Title

Executive Director

Signature

DocuSigned by:

Patricia Wells

722CF180EE194A1...

Date (mm/dd/yyyy)

1/10/2024

Previous edition is obsolete

form HUD 50071 (01/14)

## **Section VII. List of Appendices**

**Appendix A. Glossary of Acronyms**

**Appendix B. OHA's Planned Capital Fund Expenditures**

**Appendix C. Approved Project-Based Voucher Allocations**

**Appendix D. OHA Housing Inventory**

**Appendix E. Public Comments Received During Public Comment Period**

**Appendix F. Evidence of Public Process**

**Appendix G: Alameda County Income Limits for 2023 and HUD Fair Market Rents  
for FY 2024**

**Appendix H: Flat Rent Policy for Public Housing**

**Appendix I: Payment Standards**

**Appendix J: Standard HUD Forms Modified for MTW Activities**

**Appendix K: Rental Assistance Demonstration (RAD) Significant Amendment**





## APPENDIX A

---

### Glossary of Acronyms

## Glossary

**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.

**ACSSA** – Alameda CoSCunty Social Services Agency

**ACSO** – Alameda County Sheriff's Office.

**BB** – Building Bridges is an initiative through OHA to serve special populations through local non-traditional programs.

**CalWORKs** – A public assistance program that provides cash aid and services to eligible families that have a child(ren) in the home. The program serves all 58 counties in the state of CA and is operated locally by county welfare departments.

**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.

**DADS** – Dads acquiring and developing skills program through ACSO.

**EHV** – Emergency Housing Vouchers

**FUPF** – Family Unification Program – Family vouchers

**FUPY - Family** Unification Program – Youth vouchers

**FCP** – OHA's Department of Family and Community Partnerships.

**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.

**HOTMA** – Housing Opportunity Through Modernization Act of 2016.

**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.

**KTH** – Key To Home program under Building Bridges.

**LAP** – Language Assistance Plan

**LEP** – Limited English Proficiency

**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.

**LIHTC** – Low Income Housing Tax Credit program

**LP** – Limited Partnership.

**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 Sheriff's 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".

**NEPA** – National Environmental Policy Act. Required environmental assessments when doing new development work.

**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.

**OHA** – Oakland Housing Authority.

**PACT** – Parents and Children Together is a local non-traditional program through OHA to reunite children with their parents who have been recently released from jail.

**PBV** – Project Based Voucher. Ongoing housing subsidy payments that are tied to a specific unit.

**PHA** – Public Housing Authority.

**RAS**- Rental Assistance Subsidy.

**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.

**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 Program.

**SCE** -- Stakeholder and Community Engagement Team

**SRO** – Single Room Occupancy. A unit that only allows occupancy by one person. These units may contain a kitchen or bathroom, or both.

**TANF** – Temporary Assistance to Needy Families. A federal assistance program provides cash assistance to low-income families with children.

**THP+** – Transitional Housing Program. A state funded county assistance program providing housing assistance and supportive services to emancipated foster youth.

**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.

**URP** – Utility Reimbursement Payment. The monthly payment OHA makes to a household when the monthly utility allowance exceeds the tenant rent obligation.

**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.

**APPENDIX B**

---

**OHA’s Planned Capital Expenditures**



## FY2025 Capital Fund Expenditure Projections

Public Housing	Development Name	Description of Work	# of Units	FY 2025
<b>Public Housing</b>				
x	Adel Court	Common area and site improvements	30	\$422,686
x	Campbell Village	Site improvements	154	\$605,400
x	Palo Vista Gardens	Site improvements	100	\$216,800
x	Oak Grove North & South	Apartment Wi-Fi infrastructure		\$114,000
x	Lockwood Gardens	Exterior improvements, parking lot repair & maintenance, and interior improvements	372	\$6,744,000
x	Peralta Village	Exterior improvements, interior improvements and repairs	390	\$1,597,500
<b>Total Public Housing</b>				<b>\$9,700,386</b>
<b>Other Affordable Housing Development &amp; Preservation</b>				
	500 Lake Park EAH	Development of 500 Lake Park in partnership with EAH	53	\$290,000
	Mandela Station Affordable (MSA)	New construction. Gap loan	238	\$17,000,000
	Harrison Towers Rehabilitation - 1621 Harrison Street	Harrison Tower Rehabilitation	101	\$6,600,000
	Foothill Family Apartments Rehab - 6946 Foothill Blvd	Loan to finance the rehabilitation of Foothill Apartments and to repay the Hanmi Bank mortgage on the property	65	\$11,500,000
	77th and Brancroft	Predevelopment/gap funding	89	\$1,000,000
	Lakehouse - East 12th Street	New construction. Board Reso No. 5208. RAS and gap loan.	23	\$13,465,000
<b>Total Other Affordable Housing Development &amp; Preservation</b>				<b>\$49,855,000</b>
<b>Administrative Buildings</b>				
	1619 Harrison Admin Offices	Building improvements, Office relocation		\$5,700,000
	1600 Harrison	Building improvements		\$750,000
	1801 Harrison	Building improvements		\$656,250

	1805 Harrison	Building improvements		\$656,250
	Service Center	Building improvements and parking lot repairs		\$791,666
	West Dist. Office	Building improvements		\$100,000
	East Dist. Office	Building improvements		\$200,000
<b>Total Admin</b>				<b>\$8,854,166</b>
<b>COCC and Other Depts.</b>				
	IT, CCGS, Finance, HR & Security, Leased Housing, Property Management Admin	Network equipment, software purchases, emergency vehicle equipment, security equipment		\$4,373,913
<b>Total COCC and Other Depts.</b>				<b>\$4,373,913</b>
<b>Total MTW Funds</b>				<b>\$ 72,783,465</b>
<b>Projected Capital Fund Grant Amount</b>				<b>\$ 5,710,721</b>

## APPENDIX C

---

### Project-Based Voucher Allocations

**Project-Based Voucher Allocation Projection at the end of FY2025  
(6/30/2025)**

Development Name	Date of Board Approval	# of PBV Units	Contract Date	Contract Expiration	Population Served
<b>HAP contracts</b>					
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	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
14 <sup>th</sup> 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
<b>OHA Scattered Sites (OAHPI)</b>					
AMP 9	July 27, 2009	1539	May 1, 2010	April 30, 2025	

AMP 10	July 27, 2009		April 1, 2010	March 31, 2025	Low-income families/public housing disposition
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 (6 <sup>th</sup> and Oak)	May 4, 2009	50	June 27, 2012	June 26, 2027	Senior
720 E 11 <sup>th</sup> 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
Madsion 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	February 25, 2020	February 25, 2040	Low Income Families
Additional vouchers awarded	May 23, 2016	5			
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
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)
95th and International	April 29, 2019	27	TBD	TBD	formerly homeless/low-income families
Fruitvale Transit Village Phase IIB	June 25, 2018	75			families and seniors
Brooklyn Basin 4	February 26, 2018	61			los income families/special needs
7th and Campbell	July 23, 2018	20			formerly homeless
Additional vouchers awarded	February 1, 2019	19			formerly homeless
Ancora Place	April 29, 2019	31			
	Units under HAP Contract	4,743			

<b>AHAP Contracts</b>	<b>Date of BoC approval</b>	<b># PBV Units</b>	<b>AHAP Contract Date</b>	<b>Population Served</b>
W Grand and Brush	July 23, 2018	28	July 14, 2022	formerly homeless
3801 MLK Family Housing	July 23, 2018	16	pending	families and special needs
34th and San Pablo	July 23, 2018	25	pending	Low-income families
Friendship Senior Housing	April 29, 2019	34	pending	special needs/seniors
285 12th St	July 22, 2019	16	pending	formerly homes/low-income families
additional VASH vouchers	June 27, 2022	8		PBV VASH
	<b>Units under AHAP Contract</b>	<b>127</b>		

<b>Conditional Awards</b>	<b>Date of BoC approval</b>	<b># PBV Units</b>	<b>AHAP Contract Date</b>	<b>Population Served</b>
500 Lake Park Ave	February 3, 2020	14	pending	PBV VASH
additional VASH vouchers	June 27, 2022	4		
2700 International Blvd	January 23, 2023	19	pending	PBV VASH
	<b>Units with conditional award</b>	<b>37</b>		



<b>Disposition Pending and NOFA Invitations and Pending ORED projects</b>				
OHA Senior Disposition Sites	October 16, 2017	101	TPV award June 2018	Public Housing Disposition
15th and Harrison	TBD	100	pending conditional	low-income families
RAD/Section 18 Blend Conversion (Chestnut/Linden/LLC/Foothill and Mandela Gateway)	CY2019	307	special PBV	low-income families

**508**

**Total PBV Units Allocated      5,415**

## APPENDIX D

---

### OHA Housing Inventory

**FY 2025 MTW Housing Inventory**  
**MTW and Non-MTW housing stock**

**End of FY 2024**

**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)	13,173
Included are Non-Elderly Disabled (NED)	85
Included are Pre-2008 FUP allocation	48

**Non -MTW**

Veterans Affairs Supportive Housing (VASH)	510
Mainstream	262
Family Unification Program (FUP)	51
Foster Youth to Independence (FYI)	49

Emergency Housing Vouchers (EHV)	515
Tenant Protection Vouchers	101
<b>TOTAL VOUCHERS</b>	<b>14,794</b>
<b>Other HUD Programs</b>	
Shelter plus Care (S+C)	258
Moderate Rehabilitation (Mod Rehab)	94
<b>TOTAL OTHER HUD PROGRAMS</b>	<b>352</b>
<b>TOTAL VOUCHERS AND OTHER HUD PROGRAMS</b>	<b>15,146</b>
<b>MTW LOCAL PROGRAMS</b>	
Parents and Children Together (PACT)	20
Local Housing Assistance Program (LHAP)	10
Sponsor-based Housing Assistance Program (SBHAP)	180
Building Bridges SRO	192
Building Bridges SRO	61
Building Bridges CalWORKs	30
Building Bridges Key To Home	23
Homekey	36
RAS	365
Tax Credit Units with no Traditional Subsidy	1,136
<b>TOTAL LOCAL PROGRAMS</b>	<b>2,053</b>
<b>Total</b>	<b>18,653</b>

## **APPENDIX E**

---

### **Comments Received During Public Comment Period**

**No public comments were received.**

## APPENDIX F

---

### Evidence of a Public Process

## Oakland Tribune

1901 Harrison St., Ste. 1100  
Oakland, CA 94612  
510-723-2850

3461119

OAKLAND HOUSING AUTHORITY  
1619 HARRISON STREET  
OAKLAND, CA 94612  
OAKLAND, CA 94612

### PROOF OF PUBLICATION

FILE NO. Erika McLitus/PIC Dept 2/26/24

#### Oakland Tribune

The Oakland Tribune

I am a citizen of the United States; I am over the age of eighteen years, and not a party to or interested in the above-entitled matter. I am the Legal Advertising Clerk of the printer and publisher of The Oakland Tribune, a newspaper published in the English language in the City of Oakland, County of Alameda, State of California.

I declare that The Oakland Tribune is a newspaper of general circulation as defined by the laws of the State of California as determined by this court's order, dated December 6, 1951, in the action entitled In the Matter of the Ascertainment and Establishment of the Standing of The Oakland Tribune as a Newspaper of General Circulation, Case Number 237798. Said order states that "The Oakland Tribune is a newspaper of general circulation within the City of Oakland, and the County of Alameda, and the State of California, within the meaning and intent of Chapter 1, Division 7, Title 1 [§§ 6000 et seq.], of the Government Code of the State of California." Said order has not been revoked, vacated, or set aside.

I declare that the notice, of which the annexed is a printed copy, has been published in each regular and entire issue of said newspaper and not in any supplement thereof on the following dates, to wit:

02/16/2024

I certify (or declare) under the penalty of perjury that the foregoing is true and correct.

Executed at Rio Vista, California.  
On this 16th day of February, 2024.



Public Notice Advertising Clerk

Legal No. 0006809436



Oakland Housing  
Authority

#### Announcement and Notice of Public Hearing

The Oakland Housing Authority (OHA) published its draft Fiscal Year (FY) 2025 Moving to Work (MTW) Annual Plan. The Plan is intended to provide information on OHA's programs and policies, including both approved and proposed MTW activities, operating budgets, and capital investment plans. A public hearing will be held on **February 26, 2024 at 6PM** to hear public comments on the draft Plan. The public is invited to attend and provide comments.

**Public Hearing Date:** Monday, February 26, 2024

**Time:** 6:00PM

**Location:** Meeting is in person at conducted both in-person at 1619 Harrison Street, Oakland, California, Commissioners' Room, first floor or via Teleconference using Zoom. To find the link, go to [www.oakha.org](http://www.oakha.org)

**Telephone:** (510) 874-1512 or (510) 874-1517

In addition, written comments will be accepted from **February 5, 2024 through 4:30PM on Wednesday, March 6, 2024**. Written comments may be submitted by email to [MTW@oakha.org](mailto:MTW@oakha.org) or mailed to:

Dominica Henderson  
Executive Office  
1619 Harrison Street  
Oakland, CA 94612

Copies of the draft documents can be accessed on the Reports and Policies section of the Oakland Housing Authority's website at [www.oakha.org](http://www.oakha.org) or by calling (510) 874-1512.

Language translation services are available in  
151 languages at all offices at no cost.  
Please call (510) 587-2100 for assistance.

所有办事处均免费提供 151 种语言的语言翻译服务

Los servicios de traducción en 151 idiomas están disponibles  
en todos las oficinas sin ningún costo.

Trương chỉnh thông dịch đầy đủ cho tới 151 tiếng nói  
miễn phí cho quý vị đang có tại  
nhiều văn phòng gần đây.

OHA provides the following TDD number for persons with hearing  
impairments, please call (510) 587-7119

OT 6809436; Feb. 16, 2024

## **Resident Advisory Board Meeting Minutes – February 14<sup>th</sup>, 2024, 5-7 PM**

### **RAB members in attendance:**

Luwana Evans  
Ka'Rinn Goodlow  
Bill Mayes  
Barbara Montgomery  
Sharon Montgomery  
Marlene Hurd  
Carol Crooks

### **Resident guests in attendance:**

Viet Dinh  
Geneveve Moore  
Iman LaCroix  
Karen Smulevitz  
Sprandore Geford

### **OHA staff in attendance:**

Patricia Wells – Executive Director, OHA  
Dominica Henderson - Chief Social Impact Officer  
Alan Love – Chief of Police, OHAPD  
Tom Deloye - Chief Officer of Real Estate Development ORED  
Nicole Thompson – Director, FCP  
Mark Schiferl, Director of Property Management  
Anna Kaydanovskaya – Director, Asset Management  
Krinzia Lopez – Assistant Director  
Melissa Benik - Policy Analyst PIC  
Araceli Tellez – Asset Management  
Dawn Pipkins – Manager, FCP  
Hanan Albabtain – Manager, FCP  
Rayna Lett – Education Analyst, FCP  
Luther Dupree – OHAPD  
Ramon Jacobo - OHAPD

**Fiscal Year 2025 MTW Plan Presentation: *Melissa Benik, Policy Analyst PIC***

### **Questions and Comments:**

Luwana Evans:  
Are any of those (RAS apartments) for senior residents?



Melissa Benik - Policy Analyst PIC:

I'm not sure if they are specified as senior units. Lake Merritt BART Senior is for seniors but I'm not sure about the other four.

Patricia Wells – Executive Director, OHA:

Lake Merritt BART Senior is of course for seniors, but I do believe we have some specialized vouchers in one or two of those. Are they all permanent supportive housing?

Tom Deloye - Chief Officer of Real Estate Development ORED:

Lake Merritt BART Senior, that's the senior property. The others are the family properties, and I don't know with specificity what other level of detail on vouchers I can provide, top of mind that is. I can get back to you.

Patricia Wells – Executive Director, OHA:

If we could get back to specify, it's a great question. I will say that several of these properties are co funded with Housing Authority funds that are specific for permanent support of housing, and persons who are formerly homeless or at risk for homelessness. That typically, in the city of Oakland means that that the likelihood of them being seniors and again, seniors who require supportive services, because they might have needs that are mental illness- There's a very high likelihood, because a lot of these are smaller units that there will be a lot of our elders served here in our city. So it's not designated senior other than Lake Merritt BART, but a lot of seniors will benefit from this development.

Luwana Evans:

When you say assets (HOTMA), are you speaking about the money in the bank? Cars? Boats?

Melissa Benik - Policy Analyst PIC:

There is a specific list specified from HUD. It's not cars or things like that, but it is money in the bank. Retirement accounts are excluded. But it would be liquid assets mostly.

Luwana Evans:

And that would affect your rent?

Melissa Benik - Policy Analyst PIC:

It would impact the rent calculation and that wouldn't change. We're not changing the rent calculation, but we are allowing you to stay on assistance for an extended period of time to allow them to save more with OHA Assistance.

Karen Smulevitz:

What is the rate of successful graduation from being a tenant of Oakland Housing Authority to being a homeowner?

Nicole Thompson – Director, FCP:

There were 123 participants who went through the homeownership program and we have 59 active who still remain. So its not a huge number, right now we have two that are in housing search and one that is in contract. At the moment we have seven that are eligible, waiting to get the subsidy letter or bank approved to begin their search.

Patricia Wells – Executive Director, OHA:

I think I heard it said that it's not a big number, but in this day and age, in this expensive real estate market to have 2 folks in line to purchase a home in this great city is phenomenal. I think 2 is a huge number. And so I say, congratulations to you, Miss Nicole, and your team that is assisting with it both there at FCP and Leased Housing and 122 folks purchasing homes is one of the highest numbers in any of California's home ownership programs. Nicole's being modest. They've done phenomenal work.

Luwana Evans:

Do you have to be the main reporter or have a grievance in order to receive a doorbell camera?

Krinzia Lopez – Assistant Director:

We are currently exploring what the dynamics will be in distributing them and we will be partnering with our police department to make sure that we come up with the best plan for procuring and being able to deliver to our residents.

Sharon Montgomery:

So normally Miss Dominica comes, and she goes over the MTW Report - so we won't have time for that this this this year?

Melissa Benik - Policy Analyst PIC:

Dominica will be presenting in the Board meeting on the 26<sup>th</sup>. But the report will be done later in the year to highlight last year's accomplishment. And highlight how we did compare to that year's plan.

Sharon Montgomery:

My other question is, will the Commissioners meeting be open? Can we watch it via Zoom?

Melissa Benik - Policy Analyst PIC:

Yes, I believe so. It's a public meeting.

## Resident Advisory Board Meeting Minutes March 13, 2024, 5-7 PM

### **RAB Members in attendance:**

Carol Crooks  
Luwana Evans  
Ka'Rinn Goodlow  
Marlene Hurd  
Jessifer Johnson  
Bill Mayes  
Sharon Montgomery  
Amparo Salmeron

### **Resident Guests in attendance:**

Shirley Adkins  
Theresa Coleman  
Viet Dinh  
Sprandore Geford  
Iman LaCroix  
Geneva Moore  
Cynthia Parrot  
Karen Smulevitz

### **Guests in attendance:**

Jessica Always – UCSF  
Phoebe Lee – UCSF  
Anna Martinez – UCSF  
Maya Vijayaraghavan – UCSF  
Weijie Wang – UCSF

### **OHA Staff in attendance:**

Melissa Benik - Policy Analyst, PIC  
Luther Dupree – Captain, OHAPD  
Michelle Hasan – Chief Housing  
Operations Officer  
Dominica Henderson - Chief Social  
Impact Officer  
Ramon Jacobo – Sergeant, OHAPD  
Anna Kaydanovskaya – Director, Asset  
Management  
Alan Love – Chief of Police, OHAPD  
Erika McLitus - Policy Analyst, PIC  
Casey Mooningham – Lieutenant,  
OHAPD  
Dawn Pipkins – Manager, FCP  
Mark Schiferl, Director, Property  
Operations  
Araceli Tellez – Resident Services  
Portfolio Administrator, Asset  
Management  
Nicole Thompson – Director, FCP  
Lebra Watts – Property Administrator,  
Property Operations  
Victoria Wimberly – RCSC, FCP

---

### ***Making Transitions Work (MTW) Plan Final Draft: Melissa Benik, Policy Analyst of PIC***

#### **Karen Smulevitz - Resident Guest:**

Is there any progress on those properties you mentioned?

#### **Melissa Benik - Policy Analyst:**

No update yet, but I will ask our development team and get back to you.

#### **Dominica Henderson - Chief Social Impact Officer:**

The project is not underway yet. The Development team was selected by CAHI, and we expect construction to begin in the near future. We will notify the RAB group when the construction begins.

**Luwana Evans - RAB:**

Well, how many floors would there be? And will they have patio decks?

**Dominica Henderson - Chief Social Impact Officer:**

The site is still in the design phase, and we will prepare a presentation to discuss this project and other planned projects. We will invite Tom Deloye, OHA's Chief Officer of Real Estate Development, and his team to come back and provide an overview of the projects that we are working on.

**KaRinn Goodlow - RAB:**

I was wondering about the surveillance cameras, have they decided who will receive them?

**Melissa Benik - Policy Analyst:**

We are in the very early stages of this activity.

**Dominica Henderson - Chief Social Impact Officer:**

For families engaged with OHAPD, we hope to provide them cameras, however we will not be able to provide them for the entire portfolio. We will identify families with assistance from OHAPD and our Property Management team to make sure that specific families are served. And you know, some residents have different challenges. We want to make sure that those residents are taken care of, so we hope to provide as a resource for families specifically, who are in engaged with OHAPD.

**Alan Love - Chief of Police:**

Just a point of a clarification that they are ring cameras that will be given to the residents. We will not have access to them.

**Shirley Adkins - Resident Guest:**

How close are we to the Wi-Fi?

**Dominica Henderson - Chief Social Impact Officer:**

It's broadband, which is the fiber optic cabling that allows for Wi-Fi, but also wired internet.

The contract was approved by the OHA's Board of Commissioners a couple months ago and will be executed with the vendor. The project will be handled in phases. The first couple sites will be brought on in the next six (6) to eight (8) months, before the end of the year. Once we begin to see success with the initial roll-out, we plan to broaden the project to include the project-based voucher portfolio. We will provide an update to the RAB at future meetings.

## APPENDIX G

---

### **Alameda County 2023 Income Limits and HUD Fair Market Rents for FY 2024**

**Section 6932. 2023 Income Limits**

<b>Number of Persons in Household:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>
--	----------	----------	----------	----------	----------	----------	----------	----------

Last page instructs how to use income limits to determine applicant eligibility and calculate affordable housing cost and rent

Alameda County Area Median Income: \$147,900	Acutely Low	15550	17750	20000	22200	24000	25750	27550	29300
	Extremely Low	31050	35500	39950	44350	47900	51450	55000	58550
	Very Low Income	51800	59200	66600	73950	79900	85800	91700	97650
	Low Income	78550	89750	100950	112150	121150	130100	139100	148050
	<b>Median Income</b>	<b>103550</b>	<b>118300</b>	<b>133100</b>	<b>147900</b>	<b>159750</b>	<b>171550</b>	<b>183400</b>	<b>195250</b>
	Moderate Income	124250	142000	159750	177500	191700	205900	220100	234300



## FY 2024 FAIR MARKET RENT DOCUMENTATION SYSTEM

The FY 2024 Oakland-Fremont, CA HUD Metro FMR Area FMRs for All Bedroom Sizes

Final FY 2024 & Final FY 2023 FMRs By Unit Bedrooms					
Year	<a href="#">Efficiency</a>	<a href="#">One-Bedroom</a>	<a href="#">Two-Bedroom</a>	<a href="#">Three-Bedroom</a>	<a href="#">Four-Bedroom</a>
FY 2024 FMR	\$1,825	\$2,131	\$2,590	\$3,342	\$3,954
<a href="#">FY 2023 FMR</a>	\$1,658	\$1,969	\$2,405	\$3,144	\$3,706

Alameda County, CA is part of the Oakland-Fremont, CA HUD Metro FMR Area, which consists of the following counties: Alameda County, CA; and Contra Costa County, CA. All information here applies to the entirety of the Oakland-Fremont, CA HUD Metro FMR Area.

## APPENDIX H

---

### Flat Rent Policy for Public Housing



### **Schedule of Flat Rents**

(Section 6-III.E. and Section 9.I.D. of the Admissions and Continued Occupancy Policy)

Households that participate in the public housing program have the option of paying a flat rent or an income-based rent. The flat rent is a standardized monthly rent based on the size of the unit leased adjusted for a utility allowance.

OHA will offer families the choice between a flat rent and an income-based rent at each regularly scheduled reexamination. This policy does not apply to families in the Housing Choice Voucher/Section 8 program or Project Based Voucher Program.

Effective Date: Jan 1, 2024	
Public Housing Flat Rent	
Efficiency	\$1,460
One Bedroom	\$1,704
Two Bedroom	\$2,072
Three Bedroom	\$2,673
Four Bedroom	\$3,163
Five Bedroom	\$3,637

OHA will comply with the requirements to make a regular flat rent offer and will provide all households with sufficient information to make an informed choice.



## **APPENDIX I**

---

### **Payment Standards**



**Oakland Housing Authority**  
**VOUCHER PAYMENT STANDARDS-2024**

Effective October 1, 2023

Bedroom Size	HUD Fair FY 2023 Market Rents	Payment Standard 110% of the Fair Market Rents
0	\$1,825	\$2,008
1	\$2,131	\$2,344
2	\$2,590	\$2,849
3	\$3,342	\$3,676
4	\$3,954	\$4,349
5	\$4,547	\$5,002
6	\$5,140	\$5,654

## **APPENDIX J**

---

### **Standard HUD Forms Modified for MTW Activities**

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

**SECTION 8 PROJECT-BASED VOUCHER PROGRAM**

**HOUSING ASSISTANCE PAYMENTS CONTRACT  
NEW CONSTRUCTION OR REHABILITATION**

**PART 2 OF HAP CONTRACT**

**OMB Burden Statement.** The public reporting burden for this collection of information is estimated to average 1 hour. This form is required to establish terms between a PHA and owner to provide housing assistance. This contract allows a PHA to enter into a HAP contract with the owner to provide housing assistance payments for eligible families. Assurances of confidentiality are not provided under this collection. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions to reduce this burden, to the Office of Public and Indian Housing, U.S. Department of Housing and Urban Development, Washington, DC 20410. HUD may not conduct and sponsor, and a person is not required to respond to, a collection of information unless the collection displays a valid control number.

**2. DEFINITIONS**

**Agreement.** Agreement to enter into HAP Contract between the owner and the PHA. The HAP contract was entered into following new construction or rehabilitation of the contract units by the owner pursuant to an Agreement.

**Contract units.** The housing units covered by this HAP contract. The contract units are described in Exhibit A.

**Controlling interest.** In the context of PHA-owned units (see definition below), controlling interest means:

- (a) Holding more than 50 percent of the stock of any corporation; or
- (b) Having the power to appoint more than 50 percent of the members of the board of directors of a non-stock corporation (such as a non-profit corporation); or
- (c) Where more than 50 percent of the members of the board of directors of any corporation also serve as directors, officers, or employees of the PHA; or
- (d) Holding more than 50 percent of all managing member interests in an LLC; or
- (e) Holding more than 50 percent of all general partner interests in a partnership;  
or

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 1 of Part 2  
(04/2023)**

(f) Having equivalent levels of control in other ownership structures.

**Family.** The persons approved by the PHA to reside in a contract unit with assistance under the program.

**HAP contract.** This housing assistance payments contract between the PHA and the owner. The contract consists of Part 1, Part 2, and the contract exhibits (listed in section 1.c of the HAP contract).

**Household.** The family and any PHA-approved live-in aide.

**Housing assistance payment.** The monthly assistance payment by the PHA for a contract unit, which includes: (1) a payment to the owner for rent to the owner under the family's lease minus the tenant rent; and (2) an additional payment to or on behalf of the family if the utility allowance exceeds total tenant payment.

**Housing quality standards (HQS).** The HUD minimum quality standards for dwelling units occupied by families receiving project-based voucher program assistance.

**HUD.** U.S. Department of Housing and Urban Development.

**HUD requirements.** HUD requirements which apply to the project-based voucher program. HUD requirements are issued by HUD headquarters, as regulations, Federal Register notices or other binding program directives.

**Newly constructed housing.** Housing units that do not exist on the proposal selection date and are developed after the date of selection pursuant to an Agreement between the PHA and owner for use under the project-based voucher program.

**Owner.** Any person or entity who has the legal right to lease or sublease a unit to a participant.

**PHA.** Public Housing Agency. The agency that has entered into the HAP contract with the owner. The agency is a public housing agency as defined in the United States Housing Act of 1937 (42 U.S.C. 1437a(b)(6)).

**PHA-owned units.** A unit is "owned by a PHA" if the unit is in a project that is:

(a) Owned by the PHA (which includes a PHA having a "controlling interest" in the entity that owns the unit; see definition above);

(b) Owned by an entity wholly controlled by the PHA; or

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 2 of Part 2  
(04/2023)**

(c) Owned by a limited liability company (LLC) or limited partnership in which the PHA (or an entity wholly controlled by the PHA) holds a controlling interest in the managing member or general partner.

**Premises.** The building or complex in which a contract unit is located, including common areas or grounds.

**Principal or interested party.** This term includes a management agent and other persons or entities participating in project management, and the officers and principal members, shareholders, investors, and other parties having a substantial interest in the HAP contract, or in any proceeds or benefits arising from the HAP contract.

**Program.** The project-based voucher program (see authorization for project-based assistance at 42 U.S.C. 1437f(o)(13)).

**Proposal selection date.** The date the PHA gives written notice of proposal selection to the owner whose proposal is selected in accordance with the criteria established in the PHA's administrative plan.

**Rehabilitated housing.** Housing units that exist on the proposal selection date but do not substantially comply with the HQS on that date and are developed pursuant to an Agreement between the PHA and owner for use under the project-based voucher program.

**Rent to owner.** The total monthly rent payable to the owner under the lease for a contract unit. Rent to owner includes payment for any housing services, maintenance and utilities to be provided by the owner in accordance with the lease.

**Tenant.** The person or persons (other than a live-in aide) who executes the lease as a lessee of the dwelling unit.

**Tenant rent.** The portion of the rent to owner payable by the family, as determined by the PHA in accordance with HUD requirements. The PHA is not responsible for paying any part of the tenant rent.

### 3. **PURPOSE**

- a. This is a HAP contract between the PHA and the owner.
- b. The purpose of the HAP contract is to provide housing assistance payments for eligible families who lease contract units that comply with

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 3 of Part 2  
(04/2023)**

the HUD HQS from the owner.

- c. The PHA must make housing assistance payments to the owner in accordance with the HAP contract for contract units leased and occupied by eligible families during the HAP contract term. HUD provides funds to the PHA to make housing assistance payments to owners for eligible families.

**4. RENT TO OWNER; HOUSING ASSISTANCE PAYMENTS**

**a. Amount of initial rent to owner**

The initial rent to owner for each contract unit is stated in Exhibit A, which is attached to and made a part of the HAP contract. At the beginning of the HAP contract term, and until rent to owner is adjusted in accordance with section 5 of the HAP contract, the rent to owner for each bedroom size (number of bedrooms) shall be the initial rent to owner amount listed in Exhibit A.

Place a check mark here ☐ if the PHA has elected not to reduce rents below the initial rent to owner.

**b. HUD rent requirements**

Notwithstanding any other provision of the HAP contract, the rent to owner may in no event exceed the amount authorized in accordance with HUD requirements. The PHA has the right to reduce the rent to owner, at any time, to correct any errors in establishing or adjusting the rent to owner in accordance with HUD requirements. The PHA may recover any overpayment from the owner.

**c. PHA payment to owner**

1. Each month the PHA must make a housing assistance payment to the owner for a unit under lease to and occupied by an eligible family in accordance with the HAP contract.
2. The monthly housing assistance payment to the owner for a contract unit is equal to the amount by which the rent to owner exceeds the tenant rent.
3. Payment of the tenant rent is the responsibility of the family. The PHA is not responsible for paying any part of the tenant rent, or for paying any other claim by the owner against a family. The PHA is responsible only for making housing assistance payments to the

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

Previous editions are obsolete

**HUD 52530A Page - 4 of Part 2  
(04/2023)**

owner on behalf of a family in accordance with the HAP contract.

4. The owner will be paid the housing assistance payment under the HAP contract on or about the first day of the month for which payment is due, unless the owner and the PHA agree on a later date.
5. To receive housing assistance payments in accordance with the HAP contract, the owner must comply with all the provisions of the HAP contract. Unless the owner complies with all the provisions of the HAP contract, the owner does not have a right to receive housing assistance payments.
6. If the PHA determines that the owner is not entitled to the payment or any part of it, the PHA, in addition to other remedies, may deduct the amount of the overpayment from any amounts due the owner, including amounts due under any other housing assistance payments contract.
7. The owner will notify the PHA promptly of any change of circumstances that would affect the amount of the monthly housing assistance payment, and will return any payment that does not conform to the changed circumstances.

**d. Termination of assistance for family**

The PHA may terminate housing assistance for a family under the HAP contract in accordance with HUD requirements. The PHA must notify the owner in writing of its decision to terminate housing assistance for the family in such case.

**5. ADJUSTMENT OF RENT TO OWNER**

**a. PHA determination of adjusted rent**

1. At each annual anniversary during the term of the HAP contract, the PHA shall adjust the amount of rent to owner, upon request to the PHA by the owner, in accordance with law and HUD requirements. In addition, the PHA shall adjust the rent to owner when there is a ten percent decrease in the published, applicable Fair Market Rent in accordance with 24 CFR 983.302. However, if the PHA has elected within the HAP contract not to reduce rents

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 5 of Part 2  
(04/2023)**



below the initial rent to owner, the rent to owner shall not be reduced below the initial rent to owner except in those cases described in 24 CFR 983.302(c)(2).

2. The adjustment of rent to owner shall always be determined in accordance with all HUD requirements. The amount of the rent to owner may be adjusted up or down, in the amount defined by the PHA in accordance with HUD requirements.

**b. Reasonable rent**

The rent to owner for each contract unit, as adjusted by the PHA in accordance with 24 CFR 983.303, may at no time exceed the reasonable rent charged for comparable units in the private unassisted market, except in cases where the PHA has elected within the HAP contract not to reduce rents below the initial rent to owner. The reasonable rent shall be determined by the PHA in accordance with HUD requirements.

**c. No special adjustments**

The PHA will not make any special adjustments of the rent to owner.

**d. Owner compliance with HAP contract**

The PHA shall not approve, and the owner shall not receive, any increase of rent to owner unless all contract units are in accordance with the HQS, and the owner has complied with the terms of the assisted leases and the HAP contract.

**e. Notice of rent adjustment**

Rent to owner shall be adjusted by written notice by the PHA to the owner in accordance with this section. Such notice constitutes an amendment of the rents specified in Exhibit A.

**6. OWNER RESPONSIBILITY**

The owner is responsible for:

- a. Performing all management and rental functions for the contract units.
- b. Maintaining the units in accordance with HQS.
- c. Complying with equal opportunity requirements.

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 6 of Part 2  
(04/2023)**

- d. Enforcing tenant obligations under the lease.
- e. Paying for utilities and housing services (unless paid by the family under the lease).
- f. Collecting from the tenant:
  - 1. Any security deposit;
  - 2. The tenant rent; and
  - 3. Any charge for unit damage by the family.

7. **OWNER CERTIFICATION**

The owner certifies that at all times during the term of the HAP contract:

- a. All contract units are in good and tenantable condition. The owner is maintaining the premises and all contract units in accordance with the HQS.
- b. The owner is providing all the services, maintenance and utilities as agreed to under the HAP contract and the leases with assisted families.
- c. Each contract unit for which the owner is receiving housing assistance payments is leased to an eligible family referred by the PHA, and the lease is in accordance with the HAP contract and HUD requirements.
- d. To the best of the owner's knowledge, the members of the family reside in each contract unit for which the owner is receiving housing assistance payments, and the unit is the family's only residence.
- e. The owner (including a principal or other interested party) is not the parent, child, grandparent, grandchild, sister, or brother of any member of a family residing in a contract unit unless the PHA has determined that approving leasing of the unit would provide a reasonable accommodation for a family member who is a person with disabilities.
- f. The amount of the housing assistance payment is the correct amount due under the HAP contract.
- g. The rent to owner for each contract unit does not exceed rents charged by the owner for other comparable unassisted units.
- h. Except for the housing assistance payment and the tenant rent as provided

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 7 of Part 2  
(04/2023)**

under the HAP contract, the owner has not received and will not receive any payments or other consideration (from the family, the PHA, HUD, or any other public or private source) for rental of the contract unit.

- i. The family does not own, or have any interest in the contract unit. If the owner is a cooperative, the family may be a member of the cooperative.

**8. CONDITION OF UNITS**

**a. Owner maintenance and operation**

The owner must maintain and operate the contract units and premises to provide decent, safe and sanitary housing in accordance with the HQS, including performance of ordinary and extraordinary maintenance. The owner must provide all the services, maintenance and utilities set forth in Exhibits B and C, and in the lease with each assisted family.

**b. PHA inspections**

1. The PHA must inspect each contract unit before execution of the HAP contract. The PHA may not enter into a HAP contract covering a unit until the unit fully complies with the HQS.
2. Before providing assistance to a new family in a contract unit, the PHA must inspect the unit. The PHA may not provide assistance on behalf of the family until the unit fully complies with the HQS.
3. At least biennially during the term of the HAP contract, the PHA must inspect a random sample, consisting of at least 20 percent of the contract units in each building, to determine if the contract units and the premises are maintained in accordance with the HQS. Turnover inspections pursuant to paragraph 2 of this section are not counted toward meeting this biennial inspection requirement.
4. If more than 20 percent of the sample of inspected contract units in a building fail the initial inspection, the PHA must reinspect 100 percent of the contract units in the building.
5. The PHA must inspect contract units whenever needed to determine that the contract units comply with the HQS and that the owner is providing maintenance, utilities, and other services in accordance with the HAP contract. The PHA must take into account complaints and any other information that comes to its attention in scheduling inspections.

---

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

Previous editions are obsolete

**HUD 52530A Page - 8 of Part 2  
(04/2023)**

**c. Violation of the housing quality standards**

1. If the PHA determines a contract unit is not in accordance with the HQS, the PHA may exercise any of its remedies under the HAP contract for all or any contract units. Such remedies include termination, suspension or reduction of housing assistance payments, and termination of the HAP contract.
2. The PHA may exercise any such contractual remedy respecting a contract unit even if the family continues to occupy the unit.
3. The PHA shall not make any housing assistance for a dwelling unit that fails to meet the HQS, unless the owner corrects the defect within the period specified by the PHA and the PHA verifies the correction. If a defect is life threatening, the owner must correct the defect within no more than 24 hours. For other defects, the owner must correct the defect within no more than 30 calendar days (or any PHA-approved extension).

**d. Maintenance and replacement—owner's standard practice**

Maintenance and replacement (including redecoration) must be in accordance with the standard practice for the building concerned as established by the owner.

**9. LEASING CONTRACT UNITS**

**a. Selection of tenants**

1. During the term of the HAP contract, the owner must lease all contract units to eligible families selected and referred by the PHA from the PHA waiting list. (See 24 CFR 983.251.)
2. The owner is responsible for adopting written tenant selection procedures that are consistent with the purpose of improving housing opportunities for very low-income families and reasonably related to program eligibility and an applicant's ability to perform the lease obligations.
3. Consistent with HUD requirements, and Federal civil rights and fair housing requirements, the owner may apply its own nondiscriminatory tenant selection procedures in determining whether to admit a family referred by the PHA for occupancy of a

---

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

Previous editions are obsolete

**HUD 52530A Page - 9 of Part 2  
(04/2023)**

contract unit. The owner may refer families to the PHA for placement on the PBV waiting list.

4. The owner must promptly notify in writing any rejected applicant of the grounds for rejection.
5. The PHA must determine family eligibility in accordance with HUD requirements.
6. The contract unit leased to each family must be appropriate for the size of the family under the PHA's subsidy standards.
7. If a contract unit was occupied by an eligible family at the time the unit was selected by the PHA, or is so occupied on the effective date of the HAP contract, the owner must offer the family the opportunity to lease the same or another appropriately-sized contract unit with assistance under the HAP contract.
8. The owner is responsible for screening and selecting tenants from the families referred by the PHA from its waiting list.

**b. Vacancies**

1. The owner must promptly notify the PHA of any vacancy in a contract unit. After receiving the owner notice, the PHA shall make every reasonable effort to refer a sufficient number of families for owner to fill the vacancy..
2. The owner must rent vacant contract units to eligible families on the PHA waiting list referred by the PHA.
3. The PHA and the owner must make reasonable, good faith efforts to minimize the likelihood and length of any vacancy.
4. If any contract units have been vacant for a period of 120 or more days since owner notice of vacancy (and notwithstanding the reasonable good faith efforts of the PHA to fill such vacancies), the PHA may give notice to the owner amending the HAP contract to reduce the number of contract units by subtracting the number of contract units (by number of bedrooms) that have been vacant for such period.

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 10 of Part 2  
(04/2023)**



**10. TENANCY**

**a. Lease**

The lease between the owner and each assisted family must be in accordance with HUD requirements. In all cases, the lease must include the HUD-required tenancy addendum. The tenancy addendum must include, word-for-word, all provisions required by HUD.

**b. Termination of tenancy**

1. The owner may only terminate the tenancy in accordance with the lease and HUD requirements.
2. The owner must give the PHA a copy of any owner eviction notice to the tenant at the same time that the owner gives notice to the tenant. Owner eviction notice means a notice to vacate, or a complaint or other initial pleading used to commence an eviction action under State or local law.

**c. Family payment**

1. The portion of the monthly rent to owner payable by the family ("tenant rent") will be determined by the PHA in accordance with HUD requirements. The amount of the tenant rent is subject to change during the term of the HAP contract. Any changes in the amount of the tenant rent will be effective on the date stated in a notice by the PHA to the family and the owner.
2. The amount of the tenant rent as determined by the PHA is the maximum amount the owner may charge the family for rent of a contract unit, including all housing services, maintenance and utilities to be provided by the owner in accordance with the HAP contract and the lease.
3. The owner may not demand or accept any rent payment from the tenant in excess of the tenant rent as determined by the PHA. The owner must immediately return any excess rent payment to the tenant.
4. The family is not responsible for payment of the portion of the contract rent covered by the housing assistance payment under the HAP contract. The owner may not terminate the tenancy of an

---

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

Previous editions are obsolete

**HUD 52530A Page - 11 of Part 2  
(04/2023)**

assisted family for nonpayment of the PHA housing assistance payment.

5. The PHA is responsible only for making the housing assistance payments to the owner on behalf of the family in accordance with the HAP contract. The PHA is not responsible for paying the tenant rent, or any other claim by the owner.

**d. Other owner charges**

1. Except as provided in paragraph 2, the owner may not require the tenant or family members to pay charges for meals or supportive services. Nonpayment of such charges is not grounds for termination of tenancy.
2. In assisted living developments receiving project-based voucher assistance, owners may charge tenants, family members, or both for meals or supportive services. These charges may not be included in the rent to owner, nor may the value of meals and supportive services be included in the calculation of reasonable rent. Non-payment of such charges is grounds for termination of the lease by the owner in an assisted living development.
3. The owner may not charge the tenant or family members extra amounts for items customarily included in rent in the locality or provided at no additional cost to the unsubsidized tenant in the premises.

**e. Security deposit**

1. The owner may collect a security deposit from the family.
2. The owner must comply with HUD and PHA requirements, which may change from time to time, regarding security deposits from a tenant.
3. The PHA may prohibit security deposits in excess of private market practice, or in excess of amounts charged by the owner to unassisted families.
4. When the family moves out of the contract unit, the owner, subject to State and local law, may use the security deposit, including any interest on the deposit, in accordance with the lease, as reimbursement for any unpaid tenant rent, damages to the unit or

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 12 of Part 2  
(04/2023)**

other amounts which the family owes under the lease. The owner must give the family a written list of all items charged against the security deposit and the amount of each item. After deducting the amount used as reimbursement to the owner, the owner must promptly refund the full amount of the balance to the family.

5. If the security deposit is not sufficient to cover amounts the family owes under the lease, the owner may seek to collect the balance from the family. However, the PHA has no liability or responsibility for payment of any amount owed by the family to the owner.

**11. FAMILY RIGHT TO MOVE**

- a. The family may terminate its lease at any time after the first two years of occupancy. The family must give the owner advance written notice of intent to vacate (with a copy to the PHA) in accordance with the lease. If the family has elected to terminate the lease in this manner, the PHA may offer the family the opportunity for tenant-based rental assistance in accordance with HUD requirements.
- b. Before providing notice to terminate the lease under paragraph a, the family must first contact the PHA to request tenant-based rental assistance if the family wishes to move with continued assistance. If tenant-based rental assistance is not immediately available upon lease termination, the PHA may place the family on a waiting list for tenant-based rental assistance.

**12. OVERCROWDED, UNDER-OCCUPIED, AND ACCESSIBLE UNITS**

The PHA subsidy standards determine the appropriate unit size for the family size and composition. The PHA and owner must comply with the requirements in 24 CFR 983.260. If the PHA determines that a family is occupying a wrong-size unit, or a unit with accessibility features that the family does not require, and the unit is needed by a family that requires the accessibility features, the PHA must promptly notify the family and the owner of this determination, and of the PHA's offer of continued assistance in another unit. 24 CFR 983.260(a).

**13. PROHIBITION OF DISCRIMINATION**

- a. The owner may not refuse to lease contract units to, or otherwise discriminate against any person or family in leasing of a contract unit, because of race, color, religion, sex (including sexual orientation and gender identity), national origin, disability, age or familial status.

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 13 of Part 2  
(04/2023)**



- b. The owner must comply with the following requirements: The Fair Housing Act (42 U.S.C. 3601–19) and implementing regulations at 24 CFR part 100 *et seq.*; Executive Order 11063, as amended by Executive Order 12259 (3 CFR, 1959–1963 Comp., p. 652 and 3 CFR, 1980 Comp., p. 307) (Equal Opportunity in Housing Programs) and implementing regulations at 24 CFR part 107; title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d-2000d-4) (Nondiscrimination in Federally Assisted Programs) and implementing regulations at 24 CFR part 1; the Age Discrimination Act of 1975 (42 U.S.C. 6101–6107) and implementing regulations at 24 CFR part 146; section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794) and implementing regulations at 24 CFR part 8; title II of the Americans with Disabilities Act, 42 U.S.C. 12101 *et seq.*; 28 CFR part 35; Executive Order 11246, as amended by Executive Orders 11375, 11478, 12086, and 12107 (3 CFR, 1964–1965 Comp., p. 339; 3 CFR, 1966–1970 Comp., p. 684; 3 CFR, 1966–1970 Comp., p. 803; 3 CFR, 1978 Comp., p. 230; and 3 CFR, 1978 Comp., p. 264, respectively) (Equal Employment Opportunity Programs) and implementing regulations at 41 CFR chapter 60; Executive Order 11625, as amended by Executive Order 12007 (3 CFR, 1971–1975 Comp., p. 616 and 3 CFR, 1977 Comp., p. 139) (Minority Business Enterprises); Executive Order 12432 (3 CFR, 1983 Comp., p. 198) (Minority Business Enterprise Development); and Executive Order 12138, as amended by Executive Order 12608 (3 CFR, 1977 Comp., p. 393 and 3 CFR, 1987 Comp., p. 245) (Women’s Business Enterprise).
- c. The owner must comply with HUD’s Equal Access to HUD-assisted or -insured housing rule (24 CFR 5.105(a)(2)).
- d. The owner must comply with the Violence Against Women Act, as amended, and HUD’s implementing regulation at 24 CFR part 5, Subpart L, and program regulations.
- e. The PHA and the owner must cooperate with HUD in the conducting of compliance reviews and complaint investigations pursuant to all applicable civil rights statutes, Executive Orders, and all related rules and regulations.

#### **14. PHA DEFAULT AND HUD REMEDIES**

If HUD determines that the PHA has failed to comply with the HAP contract, or has failed to take appropriate action to HUD’s satisfaction or as directed by HUD, for enforcement of the PHA’s rights under the HAP contract, HUD may assume

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 14 of Part 2  
(04/2023)**

the PHA's rights and obligations under the HAP contract, and may perform the obligations and enforce the rights of the PHA under the HAP contract.

**15. OWNER DEFAULT AND PHA REMEDIES**

**a. Owner default**

Any of the following is a default by the owner under the HAP contract:

1. The owner has failed to comply with any obligation under the HAP contract, including the owner's obligations to maintain all contract units in accordance with the housing quality standards.
2. The owner has violated any obligation under any other housing assistance payments contract under Section 8 of the United States Housing Act of 1937 (42 U.S.C. 1437f).
3. The owner has committed any fraud or made any false statement to the PHA or HUD in connection with the HAP contract.
4. The owner has committed fraud, bribery or any other corrupt or criminal act in connection with any Federal housing assistance program.
5. If the property where the contract units are located is subject to a lien or security interest securing a HUD loan or a mortgage insured by HUD and:
  - i. The owner has failed to comply with the regulations for the applicable mortgage insurance or loan program, with the mortgage or mortgage note, or with the regulatory agreement; or
  - ii. The owner has committed fraud, bribery or any other corrupt or criminal act in connection with the HUD loan or HUD-insured mortgage.
6. The owner has engaged in any drug-related criminal activity or any violent criminal activity.

**b. PHA remedies**

1. If the PHA determines that a breach has occurred, the PHA may exercise any of its rights or remedies under the HAP contract.

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 15 of Part 2  
(04/2023)**

2. The PHA must notify the owner in writing of such determination. The notice by the PHA to the owner may require the owner to take corrective action (as verified by the PHA) by a time prescribed in the notice.
3. The PHA's rights and remedies under the HAP contract include recovery of overpayments, termination or reduction of housing assistance payments, and termination of the HAP contract.

**c. PHA remedy is not waived**

The PHA's exercise or non-exercise of any remedy for owner breach of the HAP contract is not a waiver of the right to exercise that remedy or any other right or remedy at any time.

**16. OWNER DUTY TO PROVIDE INFORMATION AND ACCESS  
REQUIRED BY HUD OR PHA**

**a. Required information**

The owner must prepare and furnish any information pertinent to the HAP contract as may reasonably be required from time to time by the PHA or HUD. The owner shall furnish such information in the form and manner required by the PHA or HUD.

**b. PHA and HUD access to premises**

The owner must permit the PHA or HUD or any of their authorized representatives to have access to the premises during normal business hours and, for the purpose of audit and examination, to have access to any books, documents, papers and records of the owner to the extent necessary to determine compliance with the HAP contract, including the verification of information pertinent to the housing assistance payments or the HAP contract.

**17. PHA AND OWNER RELATION TO THIRD PARTIES**

**a. Injury because of owner action or failure to act**

The PHA has no responsibility for or liability to any person injured as a result of the owner's action or failure to act in connection with the implementation of the HAP contract, or as a result of any other action or failure to act by the owner.

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 16 of Part 2  
(04/2023)**

**b. Legal relationship**

The owner is not the agent of the PHA. The HAP contract does not create or affect any relationship between the PHA and any lender to the owner or any suppliers, employees, contractors or subcontractors used by the owner in connection with the implementation of the HAP contract.

**c. Exclusion of third-party claims**

Nothing in the HAP contract shall be construed as creating any right of a family or other third party (other than HUD) to enforce any provision of the HAP contract, or to assert any claim against HUD, the PHA or the owner under the HAP contract.

**d. Exclusion of owner claims against HUD**

Nothing in the HAP contract shall be construed as creating any right of the owner to assert any claim against HUD.

**18. PHA-OWNED UNITS**

Notwithstanding Section 17 of this HAP contract, a PHA may own units assisted under the project-based voucher program, subject to the special requirements in 24 CFR 983.59 regarding PHA-owned units.

**19. CONFLICT OF INTEREST**

**a. Interest of members, officers, or employees of PHA, members of local governing body, or other public officials**

1. No present or former member or officer of the PHA (except tenant-commissioners), no employee of the PHA who formulates policy or influences decisions with respect to the housing choice voucher program or project-based voucher program, and no public official or member of a governing body or State or local legislator who exercises functions or responsibilities with respect to these programs, shall have any direct or indirect interest, during his or her tenure or for one year thereafter, in the HAP contract.
2. HUD may waive this provision for good cause.

**b. Disclosure**

The owner has disclosed to the PHA any interest that would be a violation of the HAP contract. The owner must fully and promptly update such

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 17 of Part 2  
(04/2023)**

disclosures.

**c. Interest of member of or delegate to Congress**

No member of or delegate to the Congress of the United States of America or resident-commissioner shall be admitted to any share or part of this HAP Contract or to any benefits arising from the contract.

**20. EXCLUSION FROM FEDERAL PROGRAMS**

**a. Federal requirements**

The owner must comply with and is subject to requirements of 2 CFR part 2424.

**b. Disclosure**

The owner certifies that:

1. The owner has disclosed to the PHA the identity of the owner and any principal or interested party.
2. Neither the owner nor any principal or interested party is listed on the U.S. General Services Administration list of parties excluded from Federal procurement and nonprocurement programs; and none of such parties are debarred, suspended, subject to a limited denial of participation or otherwise excluded under 2 CFR part 2424.

**21. TRANSFER OF THE CONTRACT OR PROPERTY**

**a. When consent is required**

1. The owner agrees that neither the HAP contract nor the property may be transferred without the advance written consent of the PHA in accordance with HUD requirements.
2. "Transfer" includes:
  - a. Any sale or assignment or other transfer of ownership, in any form, of the HAP contract or the property;
  - b. The transfer of any right to receive housing assistance payments that may be payable pursuant to the HAP contract;

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 18 of Part 2  
(04/2023)**



- c. The creation of a security interest in the HAP contract or the property;
  - d. Foreclosure or other execution on a security interest; or
  - e. A creditor's lien, or transfer in bankruptcy.
3. If the owner is a corporation, partnership, trust or joint venture, the owner is not required to obtain advance consent of the PHA pursuant to paragraph a for transfer of a passive and non-controlling interest in the ownership entity (such as a stock transfer or transfer of the interest of a limited partner), if any interests so transferred cumulatively represent less than half the beneficial interest in the HAP contract or the property. The owner must obtain advance consent pursuant to paragraph a for transfer of any interest of a general partner.

**b. Transferee assumption of HAP contract**

No transferee (including the holder of a security interest, the security holder's transferee or successor in interest, or the transferee upon exercise of a security interest) shall have any right to receive any payment of housing assistance payments pursuant to the HAP contract, or to exercise any rights or remedies under the HAP contract, unless the PHA has consented in advance, in writing to such transfer, and the transferee has agreed in writing, in a form acceptable to the PHA in accordance with HUD requirements, to assume the obligations of the owner under the HAP contract, and to comply with all the terms of the HAP contract.

**c. Effect of consent to transfer**

- 1. The creation or transfer of any security interest in the HAP contract is limited to amounts payable under the HAP contract in accordance with the terms of the HAP contract.
- 2. The PHA's consent to transfer of the HAP contract or the property does not to change the terms of the HAP contract in any way, and does not change the rights or obligations of the PHA or the owner under the HAP contract.
- 3. The PHA's consent to transfer of the HAP contract or the property to any transferee does not constitute consent to any further transfers of the HAP contract or the property, including further transfers to any successors or assigns of an approved transferee.

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 19 of Part 2  
(04/2023)**

**d. When transfer is prohibited**

The PHA will not consent to the transfer if any transferee, or any principal or interested party is debarred, suspended subject to a limited denial of participation, or otherwise excluded under 2 CFR part 2424, or is listed on the U.S. General Services Administration list of parties excluded from Federal procurement or nonprocurement programs.

**22. SUBSIDY LAYERING**

**a. Owner disclosure**

The owner must disclose to the PHA, in accordance with HUD requirements, information regarding any related assistance from the Federal Government, a State, or a unit of general local government, or any agency or instrumentality thereof, that is made available or is expected to be made available with respect to the contract units. Such related assistance includes, but is not limited to, any loan, grant, guarantee, insurance, payment, rebate, subsidy, credit, tax benefit, or any other form of direct or indirect assistance.

**b. Limit of payments**

Housing assistance payments under the HAP contract must be no more than is necessary, as determined in accordance with HUD requirements, to provide affordable housing after taking account of such related assistance. The PHA will adjust in accordance with HUD requirements the amount of the housing assistance payments to the owner to compensate in whole or in part for such related assistance.

**23. OWNER LOBBYING CERTIFICATIONS**

**a. The owner certifies, to the best of owner's knowledge and belief, that:**

1. No Federally appropriated funds have been paid or will be paid, by or on behalf of the owner, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of the HAP contract, or the extension, continuation, renewal, amendment, or modification of the HAP contract.
2. If any funds other than Federally appropriated funds have been paid or will be paid to any person for influencing or attempting to

---

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

Previous editions are obsolete

**HUD 52530A Page - 20 of Part 2  
(04/2023)**

influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the HAP contract, the owner must complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

- b. This certification by the owner is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. 1352.

**24. TERMINATION OF HAP CONTRACT FOR WRONGFUL SELECTION OF CONTRACT UNITS**

The HAP contract may be terminated upon at least 30 days notice to the owner by the PHA or HUD if the PHA or HUD determines that the contract units were not eligible for selection in conformity with HUD requirements.

**25. NOTICES AND OWNER CERTIFICATIONS**

- a. Where the owner is required to give any notice to the PHA pursuant to the HAP contract or any other provision of law, such notice must be in writing and must be given in the form and manner required by the PHA.
- b. Any certification or warranty by the owner pursuant to the HAP contract shall be deemed a material representation of fact upon which reliance was placed when this transaction was made or entered into.

**26. NOTICE OF TERMINATION OR EXPIRATION WITHOUT EXTENSION**

- a. An owner must provide notice to the PHA, and to the affected tenants, not less than 1 year prior to the termination or expiration without extension of a HAP contract.
- b. An owner who fails to provide such notice must permit tenants to remain in their units for the required notice period with no increase in the tenant portion of the rent. During this time period, an owner may not evict a tenant as a result of the owner's inability to collect an increased tenant portion of rent. With PHA agreement, an owner may extend the terminating contract for a period of time sufficient to give tenants 1 years's advance notice.

**27. FAMILY'S RIGHT TO REMAIN**

Upon termination or expiration of the contract without extension, each family assisted under the contract may elect to use its assistance to remain in the project

Project-Based Voucher Program  
HAP Contract for New Construction/Rehab

Previous editions are obsolete

HUD 52530A Page - 21 of Part 2  
(04/2023)



if the family's unit complies with the inspection requirements under section 8(o)(8) (42 U.S.C. 1437f(o)(8) of the U.S. Housing Act of 1937 ("the 1937 Act")), the rent for the unit is reasonable as required by section 8(o)(10)(A) of the 1937 Act, and the family pays its required share of the rent and the amount, if any, by which the unit rent (including the amount allowed for tenant-paid utilities) exceeds the applicable payment standard.

**28. ENTIRE AGREEMENT; INTERPRETATION**

- a. The HAP contract, including the exhibits, is the entire agreement between the PHA and the owner.
- b. The HAP contract must be interpreted and implemented in accordance with all statutory requirements, and with all HUD requirements, including amendments or changes in HUD requirements during the term of the HAP contract. The owner agrees to comply with all such laws and HUD requirements. Any regulatory citation specifically included in this HAP contract is subject to any subsequent revision of such citation.

---

Previous editions are obsolete

**Project-Based Voucher Program  
HAP Contract for New Construction/Rehab**

**HUD 52530A Page - 22 of Part 2  
(04/2023)**

## APPENDIX K

---

### **Rental Assistance Demonstration (RAD) Significant Amendment**

## **Rental Assistance Demonstration (RAD) Significant Amendment**

OHA is amending its annual MTW Plan because it is an applicant in the Rental Assistance Demonstration (RAD). OHA will apply for RAD/Section 18 blends in order to obtain the highest proportion of Tenant Protection Vouchers (TPVs) for which it is eligible in each of the conversions. If the application is successful OHA will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-2, REV-3, REV-4 and any successor Notices.

Upon conversion to Project Based Vouchers the Authority will adopt the resident rights, participation, waiting list and grievance procedures listed in Section 1.6 of PIH Notice 2012-32, REV-2, 3 and 4; and PIH Notice 2016-17; These resident rights, participation, waiting list and grievance procedures are appended to this Attachment. Additionally, OHA certifies that it is currently compliant with all fair housing and civil rights requirements.

RAD was designed by HUD to assist in addressing the capital needs of public housing by providing OHA with access to private sources of capital to repair and preserve its affordable housing assets. Please be aware that upon conversion, the Authority's Capital Fund Budget will be reduced by the pro rata share of public housing developments converted as part of the Demonstration, and that OHA may also borrow funds to address their capital needs.

OHA is not currently under a voluntary compliance agreement, consent order or consent decree or final judicial ruling or administrative ruling or decision.

RAD conversions described in the Plan comply with all applicable site selection and neighborhood review standards and all appropriate procedures will be followed.

Below, please find specific information related to the public housing development(s) planned for RAD: (Note that currently the RAD conversion plans for Linden Court, Chestnut Court, and Mandela Gateway are on hold. They are still included in this Significant Amendment in case the status changes during the FY).

### **Development #1: Linden Court**

<b>Development Name</b>	<b>PIC Number</b>	<b>Conversion Type</b>	<b>Transfer of Assistance</b>
Linden Court	CA003000115	PBV	
<b>Unit Count:</b> 38 Units	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type –Post RAD:</b> Family Housing	<b>Capital Fund Attributable to project</b> \$84,351
<b>Bedroom Types:</b>	<b># Units Pre Conv.:</b>	<b># Units Post Conv.:</b>	<b>Change in # Units and why (De Minimus Reduction, Transfer</b>

			<b>of Assistance, Unit Reconfiguration:</b>
<b>Two Bedroom</b>	4	4	N/A
<b>Three Bedroom</b>	28	28	N/A
<b>Five Bedroom</b>	6	6	N/A

Development # 2: Chestnut Court

<b>Development Name</b> Chestnut Court	<b>PIC Number</b> CA003000118	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
<b>Unit Count:</b> 45 Units	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type –Post RAD:</b> Family Housing	<b>Capital Fund:</b> \$98,040
<b>Bedroom Types:</b>	<b># Units Pre Conv.:</b>	<b># Units Post Conv.:</b>	<b>Change in # Units and why (De Minimus Reduction, Transfer of Assistance, Unit Reconfiguration:</b>
<b>Two Bedroom</b>	13	13	N/A
<b>Three Bedroom</b>	24	24	N/A
<b>Four Bedroom</b>	8	8	N/A
<b>Post Conversion Sponsor:</b>	No change		

Development # 3: Lion Creek Crossing Phase 1 & 2

<b>Development Name</b> Lion Creek Crossing Phase 1 & 2	<b>PIC Number</b> CA003000119	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
<b>Unit Count:</b> 99 Units	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type –Post RAD:</b> Family Housing	<b>Capital Fund:</b> \$213,142
<b>Bedroom Types:</b>	<b># Units Pre Conv.:</b>	<b># Units Post Conv.:</b>	<b>Change in # Units and why (De Minimus Reduction, Transfer of Assistance, Unit Reconfiguration:</b>
<b>One Bedroom</b>	12	12	N/A
<b>Two Bedroom</b>	14	14	N/A
<b>Three Bedroom</b>	55	55	N/A
<b>Four Bedroom</b>	9	9	N/A

<b>Five Bedroom</b>	9	9	N/A
<b>Post Conversion Sponsor:</b>	No change		

Development # 4: Lion Creek Crossing Phase 3

<b>Development Name</b> Lion Creek Crossing Phase 3	<b>PIC Number</b> CA003000123	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
<b>Unit Count:</b> 37 Units	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type –Post RAD:</b> Family Housing	<b>Capital Fund:</b> \$85,696
<b>Bedroom Types:</b>	<b># Units Pre Conv.:</b>	<b># Units Post Conv.:</b>	<b>Change in # Units and why (De Minimus Reduction, Transfer of Assistance, Unit Reconfiguration:</b>
<b>Three Bedroom</b>	28	28	N/A
<b>Four Bedroom</b>	9	9	N/A
<b>Post Conversion Sponsor:</b>	No change		

Development # 5: Lion Creek Crossing Phase 4

<b>Development Name</b> Lion Creek Crossing Phase 4	<b>PIC Number</b> CA003000124	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
<b>Unit Count:</b> 21 Units	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type –Post RAD:</b> Family Housing	<b>Capital Fund:</b> \$47,314
<b>Bedroom Types:</b>	<b># Units Pre Conv.:</b>	<b># Units Post Conv.:</b>	<b>Change in # Units and why (De Minimus Reduction, Transfer of Assistance, Unit Reconfiguration:</b>
<b>Two Bedroom</b>	1	1	N/A
<b>Three Bedroom</b>	20	20	N/A
<b>Post Conversion Sponsor:</b>	No change		

Development # 6: Foothill Family

<b>Development Name</b> Foothill Family	<b>PIC Number</b> CA003000120	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
--	----------------------------------	-------------------------------	-------------------------------

<b>Unit Count:</b> 21 Units	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type –Post RAD:</b> Family Housing	<b>Capital Fund:</b> \$46,905
<b>Bedroom Types:</b>	<b># Units Pre Conv.:</b>	<b># Units Post Conv.:</b>	<b>Change in # Units and why (De Minimus Reduction, Transfer of Assistance, Unit Reconfiguration:</b>
<b>Two Bedroom</b>	2	2	N/A
<b>Three Bedroom</b>	19	19	N/A
<b>Post Conversion Sponsor:</b>	No change		

Development # 7: Mandela Gateway

<b>Development Name</b> Mandela Gateway	<b>PIC Number</b> CA003000117	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
<b>Unit Count:</b> 46 Units	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type –Post RAD:</b> Family Housing	<b>Capital Fund:</b> \$99,555
<b>Bedroom Types:</b>	<b># Units Pre Conv.:</b>	<b># Units Post Conv.:</b>	<b>Change in # Units and why (De Minimus Reduction, Transfer of Assistance, Unit Reconfiguration:</b>
<b>Two Bedroom</b>	17	17	N/A
<b>Three Bedroom</b>	19	19	N/A
<b>Four Bedroom</b>	10	10	
<b>Post Conversion Sponsor:</b>	No change		

In 2019, OHA had \$675,003 in capital funds allocated to the seven proposed RAD sites. OHA plans to do 'rent bundling' where we take the operating and capital funds for all of the properties and re-distribute them to the properties based on need and other factors.

### Transfer of Waiting Lists

Because these properties are all fully occupied, no new waiting lists will be established. The owner or property manager will continue to manage and maintain the existing site-based waiting list, including any OHA approved selection preferences, in accordance with OHA's Housing Choice Voucher program Administrative Plan. When it is determined that the waitlist needs to be opened, OHA will advertise the opening in accordance with its policies as specified in the Admin Plan.

It is anticipated that rehabilitation projects completed in conjunction with the RAD conversions will require temporary relocation of some or all of the tenants. All relocated tenants will have the right to return to an assisted unit in the converting property.

## **Changes in Policies that Govern eligibility, admissions, resident selection and occupancy of units**

When conversion is completed for the developments noted above, all former public housing residents will have project-based vouchers (PBV) and their continued eligibility will be based on the Housing Choice Voucher guidelines and requirements currently in use at OHA.

1. **Admission:** Each site uses a site-based waitlist for all applicants, and this will not change. As each development is converted, the existing site-based waitlist will remain in place. When applicants are pulled from the waitlist to fill vacancies, they will be offered PBV assistance and proceed through the eligibility process. Property management will screen new applicants for criminal history, landlord references, debts owed to HUD programs and income/family eligibility as specified in the Admin Plan.

2. **Occupancy of Units:** As noted above, applications for units will be screened by the Eligibility team. Once a client has been screened and accepted, their file will be referred to the development where the client is eligible for housing if there is a vacancy.

3. **Annual Inspections/Re-certifications:** The existing property management will conduct inspections for all units and perform re-certifications for residents per the schedule based on MTW Activity #14-01.

4. **Resident Rights:** Converted developments will be managed in accordance with state law. In reference to their Project Based Voucher, they will receive the same rights and obligations as any other Housing Choice Voucher participant, including termination of assistance criteria and hearings.

### **Resident Rights, Participation, Waiting List and Grievance Procedures If converting to PBV:**

#### **PIH Notice 2012-32 REV-4**

#### **1.6 C-PBV Resident Rights and Participation**

1. **No Re-screening of Tenants upon Conversion.** Pursuant to the RAD statute, at conversion, current households are not subject to rescreening, income eligibility, or income targeting. Consequently, current households will be grandfathered for conditions that occurred prior to conversion but will be subject to any ongoing eligibility requirements for actions that occur after conversion. For example, a unit with a household that was over-income at time of conversion would continue to be treated as an assisted unit. Thus, 24 CFR § 982.201, concerning eligibility and targeting, will not apply for current households. Once that remaining household moves out the unit must be leased to an eligible family. MTW agencies may not alter this requirement.

2. **Right to Return.** Any resident that may need to be temporarily relocated to facilitate rehabilitation or construction has a right to return to an assisted unit at the Covered Project once the rehab or construction is completed. See section 1.4-A 5(ii)

and the RAD Fair Housing, Civil rights and Relocation Notice regarding a resident's right to return.

**3. Renewal of Lease.** Since publication of the PIH Notice 2012-32, REV-1 the regulations under 24 CFR § 983.257(b)(3) have been amended requiring Project Owners to renew all leases upon lease expiration, unless cause exists. MTW agencies may not alter this requirement.

**4. Phase-in of Tenant Rent Increases.** If a tenant's monthly rent increases by more than the greater of 10 percent or \$25 purely as a result of conversion, the rent increase will be phased in over 3 or 5 years. To implement this provision, HUD is specifying alternative requirements for section 3(a)(1) of the Act, as well as 24 CFR § 983.3 (definition of "total tenant payment" (TTP)) to the extent necessary to allow for the phase-in of tenant rent increases. A PHA must create a policy setting the length of the phase in period at three years, five years or a combination depending on circumstances. For example, a PHA may create a policy that uses a three year phase in for smaller increases in rent and a five year phase-in for larger increases in rent. This policy must be in place at conversion and may not be modified after conversion.

The method described below explains the set percentage-based phase-in a Project Owner must follow according to the phase-in period established. For purposes of this section "standard TTP" refers to the TTP calculated in accordance with regulations at 24 CFR §5.628 and the "most recently paid TTP" refers to the TTP recorded on line 9j of the family's most recent HUD Form 50058. If a family in a project converting from public housing to PBV was paying a flat rent immediately prior to conversion, the PHA should use the flat rent amount to calculate the phase-in amount for Year 1, as illustrated below.

**Three Year Phase-in:**

**Year 1:** Any recertification (interim or annual) performed prior to the second annual recertification after conversion – 33% of difference between most recently paid TTP or flat rent and the standard TTP

**Year 2:** Year 2 Annual Recertification (AR) and any Interim Re-certification (IR) prior to Year 3 AR – 66% of difference between most recently paid TTP and the standard TTP

**Year 3:** Year 3 AR and all subsequent re-certifications

**Full standard TTP Five Year Phase in:**

**Year 1:** Any recertification (interim or annual) performed prior to the second annual recertification after conversion – 20% of difference between most recently paid TTP or flat rent and the standard TTP

**Year 2:** Year 2 AR and any IR prior to Year 3 AR – 40% of difference between most recently paid TTP and the standard TTP

**Year 3:** Year 3 AR and any IR prior to Year 4 AR – 60% of difference between most recently paid TTP and the standard TTP

**Year 4:** Year 4 AR and any IR prior to Year 5 AR – 80% of difference between most recently paid TTP and the standard TTP

**Year 5:** AR and all subsequent recertifications – Full standard TTP



**5. Family Self Sufficiency (FSS) and Resident Opportunities and Self Sufficiency Service Coordinator (ROSS-SC) programs:**

Families at the Covered Projects that currently participate in the FSS or ROSS programs will be able to continue to participate. After conversion, families that are interested in participating in these programs may contact the Family and Community Partnerships department for information on applying.

**6. Resident Participation and Funding.** In accordance with Attachment 1B, residents of Covered Projects with converted PBV assistance will have the right to establish and operate a resident organization for the purpose of addressing issues related to their living environment and be eligible for resident participation funding.

**1. Resident Procedural Rights.** The following items must be incorporated into both the Administrative Plan and the Project Owner's lease, which includes the required tenancy addendum, as appropriate. Evidence of such incorporation may be requested by HUD for purposes of monitoring the program.

**i. Termination Notification.** HUD is incorporating additional termination notification requirements to comply with section 6 of the Act for public housing projects that convert assistance under RAD. In addition to the regulations at 24 CFR § 983.257 related to Project Owner termination of tenancy and eviction (which MTW agencies may not alter) the termination procedure for RAD conversions to PBV will require that PHAs provide adequate written notice of termination of the lease which shall not be less than:

- a. A reasonable period of time, but not to exceed 30 days:
  - i. If the health or safety of other tenants, OHA (or its agent) employees, or persons residing in the immediate vicinity of the premises is threatened; or ii. In the event of any drug-related or violent criminal activity or any felony conviction;
- b. 14 days in the case of nonpayment of rent; and
- c. 30 days in any other case, except that if a State or local law provides for a shorter period of time, such shorter period shall apply.

**ii. Grievance Process (OHA uses the term Hearing instead of Grievance).** Pursuant to requirements in the RAD Statute, HUD is establishing additional procedural rights to comply with section 6 of the Act. For issues related to tenancy and termination of assistance, PBV program rules require the Project Owner to provide an opportunity for an informal hearing, as outlined in 24 CFR § 982.555. RAD will specify alternative requirements for 24 CFR § 982.555(b) in part, which outlines when informal hearings are not required, to require that:

- a. In addition to reasons that require an opportunity for an informal hearing given in 24 CFR § 982.555(a)(1)(i)-(vi), an opportunity for an informal hearing must be given to residents for any dispute that a resident may have with respect to a Project Owner action in accordance with the individual's lease or the contract administrator in accordance with RAD PBV requirements that adversely affect the resident's rights, obligations, welfare, or status.

- i. For any hearing required under 24 CFR § 982.555(a)(1)(i)-(vi), the contract administrator will perform the hearing, as is the current standard in the program. The hearing officer must be selected in accordance with 24 CFR § 982.555(e)(4)(i).
- ii. For any additional hearings required under RAD, the Project Owner will perform the hearing.

b. There is no right to an informal hearing for class grievances or to disputes between residents not involving the Project Owner or contract administrator.

c. The Project Owner gives residents notice of their ability to request an informal hearing as outlined in 24 CFR § 982.555(c)(1) for informal hearings that will address circumstances that fall outside of the scope of 24 CFR § 982.555(a)(1)(i)-(vi).

d. The Project Owner provides opportunity for an informal hearing before an eviction. Current PBV program rules require that hearing procedures must be outlined in OHA's Administrative Plan.

**2. Earned Income Disregard (EID).** Tenants who are employed and are currently receiving the EID exclusion at the time of conversion will continue to receive the EID after conversion, in accordance with regulations at 24 CFR § 5.617. Upon the expiration of the EID for such families, the rent adjustment shall not be subject to rent phase-in, as described in Section 1.6.C.4; instead, the rent will automatically rise to the appropriate rent level based upon tenant income at that time. Under the Housing Choice Voucher program, the EID exclusion is limited only to persons with disabilities (24 CFR § 5.617(b)). In order to allow all tenants (including non-disabled persons) who are employed and currently receiving the EID at the time of conversion to continue to benefit from this exclusion in the PBV project, the provision in section 5.617(b) limiting EID to disabled persons is waived. The waiver, and resulting alternative requirement, apply only to tenants receiving the EID at the time of conversion. No other tenant (e.g., tenants who at one time received the EID but are not receiving the EID exclusion at the time of conversion e.g., due to loss of employment; tenants that move into the property following conversion, etc.) is covered by this waiver.

**3. Jobs Plus.** Chestnut Court and Linden Court are included in the Jobs Plus grant program awarded in FY 2015. Any grantees awarded funds or future funds will be able to finish out their Jobs Plus period of performance at these sites.

**4. When Total Tenant Payment Exceeds Gross Rent.** Under normal PBV rules, the PHA may only select an occupied unit to be included under the PBV HAP contract if unit's occupants are eligible for housing assistance payments (24 CFR §983.53(d)). Also, a PHA must remove a unit from the contract when no assistance has been paid for two years (MTW Activity #10-02) because the family's TTP has risen to a level that is equal to or greater than the contract rent, plus any utility allowance, for the unit (i.e., the Gross Rent)) (24 CFR §983.258). Since the rent limitation under this Section of the Notice may often result in a family's TTP equaling or exceeding the gross rent for the unit, for current residents (i.e residents living in the public housing property prior to

conversion), HUD is waiving both of these provisions and requiring that the unit for such families be placed on and/or remain under the HAP contract when TTP equals or exceeds than the Gross Rent. Further, HUD is establishing the alternative requirement that the rent to owner for the unit equal the family's TTP or max rent under the LIHTC regulations until such time that the family is eligible for a housing assistance payment. HUD is waiving as necessary to implement this alternative provision, the provisions of Section 8(o)(13)(H) of the Act and the implementing regulations at 24 CFR 983.301 as modified by Section 1.6.B.5 of this Notice. In such cases, the resident is considered a participant under the program and all of the family obligations and protections under RAD and PBV apply to the resident.

Likewise, all requirements with respect to the unit, such as compliance with the HQS requirements, apply as long as the unit is under HAP contract. Assistance may subsequently be reinstated if the tenant becomes eligible for assistance. The PHA is required to process these individuals through the Form-50058 sub-module in PIC.

Following conversion, 24 CFR §983.53(d) applies, and any new families referred to the RAD PBV project must be initially eligible for a HAP payment at admission to the program, which means their TTP may not exceed the gross rent for the unit at that time. Further, a PHA must remove a unit from the contract when no assistance has been paid for two years (MTW Activity #10-02). If units are removed from the HAP contract because a new admission's TTP comes to equal or exceed the gross rent for the unit and if the project is fully assisted, HUD is imposing an alternative requirement that the PHA must reinstate the unit after the family has vacated the property; and, if the project is partially assisted, the PHA may substitute a different unit for the unit on the HAP contract in accordance with 24 CFR §983.207 or, where "floating" units have been permitted, Section 1.6.B.10 of this Notice.

**5. Under-Occupied Unit.** If a family is in an under-occupied unit under 24 CFR 983.259 at the time of conversion, the family may remain in this unit until an appropriate-sized unit becomes available in the Covered Project. When an appropriate sized unit becomes available in the Covered Project, the family living in the under-occupied unit must move to the appropriate-sized unit within a reasonable period of time, as determined by the administering Voucher Agency. In order to allow the family to remain in the under-occupied unit until an appropriate-sized unit becomes available in the Covered Project, 24 CFR 983.259 is waived. MTW agencies may not modify this requirement.

#### **1.6-D. PBV: Other Miscellaneous Provisions**

**1. Access to Records, Including Requests for Information Related to Evaluation of Demonstration.** OHA must agree to any reasonable HUD request for data to support program evaluation, including but not limited to project financial statements, operating data, Choice-Mobility utilization, and rehabilitation work.

**2. Additional Monitoring Requirement.** OHA's Board must approve the operating budget for the Covered Projects annually in accordance with HUD requirements.

**3. Davis-Bacon Act and Section 3 of the Housing and Urban Development Act of 1968 (Section 3).** Comply with 1.4.A.13 and 1.4.A.14 of PIH 2012-32, REV-3.

**4. Establishment of Waiting List.** 24 CFR § 983.251 sets out PBV program requirements related to establishing and maintaining a voucher-wide, PBV program wide, or site-based waiting list from which residents for the affected projects will be admitted. These provisions will apply unless the project is covered by a remedial order or agreement that specifies the type of waiting list and other waiting list policies. OHA shall consider the best means to transition applicants from the current public housing waiting list, including:

- i. Transferring an existing site-based waiting list to a new site-based waiting list. If OHA is transferring the assistance to another neighborhood, OHA must notify applicants on the wait-list of the transfer of assistance, and on how they can apply for residency at the new project site or other sites. Applicants on a project-specific waiting list for a project where the assistance is being transferred shall have priority on the newly formed waiting list for the new project site in accordance with the date and time of their application to the original project's waiting list. NOTE: Not applicable
- ii. Informing applicants on the site-based waiting list on how to apply for a PBV program-wide or HCV program-wide waiting list.
- iii. Informing applicants on a public housing community wide waiting list on how to apply for a voucher-wide, PBV program-wide, or site-based waiting list. OHA shall establish a waiting list in accordance with 24 CFR § 903.7(b)(2)(ii)-(iv) to ensure that applicants on the PHA's public housing community-wide waiting list have been offered placement on the converted project's initial waiting list. OHA uses site-based waitlists for the conversion sites and all other sites.

In all cases, PHAs have the discretion to determine the most appropriate means of informing applicants on the public housing site based waiting list given the number of applicants, PHA resources, and admissions requirements of the projects being converted under RAD. A PHA may consider contacting every applicant on the site-based public housing waiting list via direct mailing; advertising the availability of housing to the population that is less likely to apply, both minority and nonminority groups, through various forms of media (e.g., radio stations, posters, newspapers) within the marketing area; informing local non-profit entities and advocacy groups (e.g., disability rights groups); and conducting other outreach as appropriate. Applicants on the agency's public housing site based waiting list who wish to be placed onto the newly-established site-based waiting list must be done so in accordance with the date and time of their original application to the centralized public housing waiting list. Any activities to contact applicants on the public housing waiting list must be conducted in accordance with the requirements for effective

communication with persons with disabilities at 24 CFR § 8.6 and with the obligation to provide meaningful access for persons with limited English proficiency (LEP).

OHA must maintain any site-based waiting list in accordance with all applicable civil rights and fair housing laws and regulations unless the project is covered by a remedial order or agreement that specifies the type of waiting list and other waiting list policies.

To implement this provision, HUD is specifying alternative requirements for 24 CFR § 983.251(c)(2). However, after the initial waiting list has been established, OHA shall administer its waiting list for the converted project in accordance with 24 CFR § 983.251(c).

**5. Mandatory Insurance Coverage.** The conversion project shall maintain at all times commercially available property and liability insurance to protect the project from financial loss and, to the extent insurance proceeds permit, promptly restore, reconstruct, and/or repair any damaged or destroyed project property.

**6. Agreement Waiver.** Comply with 1.6.(B)(7) of PIH 2012-32, REV 3.

**7. Future Refinancing.** Project Owners must receive HUD approval for any refinancing or restructuring of permanent debt during the HAP contract term, to ensure the financing is consistent with long-term preservation. (Current lenders and investors are also likely to require review and approval of refinancing of the primary permanent debt.)

**8. Administrative Fees for Public Housing Conversions during Transition Period.** For the remainder of the Calendar Year in which the HAP Contract is effective (i.e. "transition period"), RAD PBV projects will be funded with public housing funds. For example, if the project's assistance converts effective July 1, 2019, the public housing Annual Contributions Contract (ACC) between the PHA and HUD will be amended to reflect the number of units under HAP contract, but will be for zero dollars, and the RAD PBV contract will be funded with public housing money for July through December 2019. Since TBRA is not the source of funds, PHAs should not report leasing and expenses into VMS during this period, and PHAs will not receive section 8 administrative fee funding for converted units during this time.

For fiscal years 2019 and 2020, PHAs operating HCV program will receive administrative fees for units under a HAP contract, consistent with recent appropriation act references to "section 8(q) of the [United States Housing Act of 1937] and related appropriations act provisions in effect immediately before the Quality Housing and Responsibility Act of 1998" and 24 CFR § 982.152(b). During the transition period mentioned in the preceding paragraph, these provisions are waived, and PHAs will not receive section 8 ongoing administrative fees for PBV RAD units. After this transition period, the section 8 ACC will be amended to include section 8 funding that corresponds to the units covered by the section 8 ACC. At that time, the regular section 8 administrative fee funding provisions will apply.

9. **Choice-Mobility.** One of the key features of the PBV program is the mobility component, which provides that if the family has elected to terminate the assisted lease at any time after the first year of occupancy in accordance with program requirements, the PHA must offer the family the opportunity for continued tenant based rental assistance, in the form of either assistance under the voucher program or other comparable tenant-based rental assistance. If as a result of participation in RAD a significant percentage of the PHA's HCV program becomes PBV assistance, it is possible for most or all of a PHA's turnover vouchers to be used to assist those RAD PBV families who wish to exercise mobility. While HUD is committed to ensuring mobility remains a cornerstone of RAD policy, HUD recognizes that it remains important for the PHA to still be able to use tenant based vouchers to address the specific housing needs and priorities of the community.

Therefore, HUD is establishing an alternative requirement for PHAs where, as a result of RAD, the total number of PBV units (including RAD PBV units) under HAP contract administered by the PHA exceeds 20 percent of the PHA's authorized units under its HCV ACC with HUD. OHA has created MTW activities that eliminate these percentage caps. OHA uses MTW flexibilities to override the 20 percent cap.

The alternative mobility policy provides that an eligible voucher agency would not be required to provide more than three-quarters of its turnover vouchers in any single year to the residents of projects covered under RAD. While a voucher agency is not required to establish a voucher inventory turnover cap, if such a cap is implemented, the voucher agency must create and maintain a waiting list in the order in which the requests from eligible households were received. In order to adopt this provision, this alternative mobility policy must be included in an eligible PHA's administrative plan. To effectuate this provision, HUD is providing an alternative requirement to Section 8(o)(13)(E) and 24 CFR part 983.261(c). Please note that this alternative requirement does not apply to PBVs entered into outside of the context of RAD. MTW agencies may not alter this requirement. OHA has the flexibility under MTW to alter the minimum stay requirement, but will not use this flexibility for RAD households.

10. **Reserve for Replacement.** The Project Owner shall establish and maintain a replacement reserve in an interest-bearing account to aid in funding extraordinary maintenance and repair and replacement of capital items in accordance with applicable regulations. The reserve must be built up to and maintained at a level determined by HUD to be sufficient to meet projected requirements. For FHA transactions, Replacement Reserves shall be maintained in accordance with the FHA Regulatory Agreement.

For all other transactions, Replacement Reserves shall be maintained in a bank account covered under a General Depository Agreement (HUD-51999) or similar instrument, as approved by HUD, where funds will be held by the Project Owner or mortgagee and may be drawn from the reserve account and used subject to HUD guidelines and as directed by HUD.



All of the projects proposed for conversion currently meet this requirement. Funding levels will be confirmed at the time the RAD Financing Plan is approved.

**PIH Notice H-2016-17**

**Subject: Relocation Requirements under the Rental Assistance Demonstration (RAD) Program, Public Housing in the First Component**

**NOTE: ALL PROJECTS WILL COMPLY WITH ANY RELOCATION REQUIREMENTS THAT APPLY AT THAT TIME.**

**SIGNIFICANT AMENDMENT DEFINITION**

As part of the Rental Assistance Demonstration (RAD), OHA is redefining the definition of a substantial deviation from the PHA Plan to exclude the following RAD-specific items:

- a. The decision to convert to either Project Based Rental Assistance or Project Based Voucher Assistance;
- b. Changes to the Capital Fund Budget produced as a result of each approved RAD Conversion, regardless of whether the proposed conversion will include use of additional Capital Funds;
- c. Changes to the construction and rehabilitation plan for each approved RAD conversion; and
- d. Changes to the financing structure for each approved RAD conversion.