



# MAKING TRANSITIONS WORK ANNUAL PLAN



## KEEPING FAMILIES HOUSED, SECURE, AND SUPPORTED



**FISCAL YEAR 2027 // JULY 1, 2026 - JUNE 30, 2027**

**DRAFT**

# Fiscal Year 2027 MTW Annual Plan

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# Housing Authority of the City of Oakland, California

## Fiscal Year 2027 MTW Annual Plan

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## Message from the Executive Director

The Oakland Housing Authority (OHA) approaches its mission with innovative and forward-thinking strategies that serve low-income families in Oakland, shaped in part by our Moving to Work (MTW) designation. Using MTW flexibilities, OHA is able to prioritize a two-pronged approach to housing assistance that equally layers rental subsidies with supportive services to promote long-term stability and opportunity.

While this mission remains a priority, OHA recognizes that times of challenge call for greater efficiency, streamlined operations, and dynamic innovation. In FY 2027, OHA will reduce processing times, eliminate delays and redundancies, and identify areas for growth to maximize productivity and impact. By leveraging every available resource, we aim to optimize our funding to deliver results that matter.

Strategic use of funds is critical to expand the impact of federal dollars and achieve meaningful outcomes. This year, OHA is proud to advance the development and rehabilitation of affordable housing projects for families we serve. OHA is implementing new strategies to address the aging housing stock and reenvision affordable housing in Oakland, with a particular focus on buttressing the Project-based Voucher (PBV) portfolio. Additionally, OHA plans to make available a new source to ensure development financing capacity for long-term affordable housing is available for years to come. This new fund, along with other activities, may incorporate non-federal resources to widen the impact of OHA services.

Housing new families and keeping families housed remains at the heart of OHA's mission. In FY 2027, OHA will explore every avenue available to ensure our Emergency Housing Voucher families remain housed, despite the limited funding for these vouchers. In FY 2027, OHA will prioritize transitioning these families into housing programs with long-term funding to prevent displacement and reduce the risk of homelessness. This approach also ensures continued support for property owners, reinforcing the strong partnerships OHA has cultivated over many years and supports the long term success of the program.

At OHA, transformation is more than a goal, it is the foundation of our work. Together—with the dedication of our staff, the vision of our Board of Commissioners, and the unwavering support of our partners—we are not just providing housing but creating opportunity, resilience, and brighter futures for all.



Thank you to all of our partners and the community for joining us in this transformative journey.

## **Section I: 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 reaches 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 the year 2028, and in March 2024, Congress passed the Consolidated Appropriations Act of 2024, extending MTW contracts an additional 10 years, prolonging the current terms through 2038. This extension, which HUD officially noted on December 23, 2024, 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 99 agencies to the expansion of the MTW Demonstration Program. Currently, OHA is one of 138 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

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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



Oakland will continue to evolve in FY 2027, bringing new challenges and opportunities. OHA remains steadfast in its efforts to provide housing assistance to as many low-income Oaklanders as possible. In FY 2027, OHA is focused on increasing operational efficiencies by identifying and streamlining key processes and procedures. This effort will allow OHA to thoughtfully review and refine existing practices, moving beyond high-level goals to focus on the operational details that drive productivity, consistency, and improve service delivery for all stakeholders including owners, residents, and staff. OHA aims to deliver a more productive, consistent, and responsive housing program. OHA will also explore opportunities for growth and leverage non-federal resources to bolster the impact of HUD dollars. Utilizing multiple funding sources will enable OHA to collaborate with new and existing partners, to increase project sustainability while maximizing resources and fostering greater community buy-in.

In addition to improving operations, OHA will focus on housing retention for families at risk of homelessness, particularly over 400 Emergency Housing Voucher households facing budget constraints. With homelessness rising – 5,485 individuals counted in 2024 compared to 5,055 in 2022 – keeping families housed is essential to prevent further displacement. Striving for full utilization in the Plan year, OHA will work on stabilizing HCV utilization at 90% balancing this goal with budget realities and aligning with HUD guidance.

Utilizing a new affordable housing fund, OHA will continue to support and fund affordable housing efforts by developing affordable housing, 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 for FY 2027:

- ❖ Stabilize utilization of HCVs awarded at a minimum 90% threshold
- ❖ Maintain housing for EHV households
- ❖ Implement the OAHPI rehabilitation multi-year strategy
- ❖ Lease all public housing and PBV sites to at least 97%
- ❖ Identify and implement operational efficiencies
- ❖ Complete at least 60-unit rehabilitations across all OHA-managed properties
- ❖ Educate staff on effectively working with special needs populations, such as human trafficking survivors.

## Long-term Goals and Objectives

OHA will continue to strive for excellence through continued commitment to local partner agencies, with a goal to expand the OHA network through exciting new partnerships, while ensuring active participation with connections with local leaders and elected officials to inform policies at the local, state, and federal levels. 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.

As new technology requires testing and time to ensure proper use, HOTMA implementation has been postponed to FY 2027. 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.

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

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

Oakland remains an extremely expensive city, with the overall cost of living 33% higher than the national average, and housing expenses 58% higher than the national average. With these statistics, it is not surprising that there continues to be a rise in the homeless population. According to the January 2024 [Point-in-Time Count \(PIT\)](#), a bi-annual snapshot of the number of individuals in shelters, temporary housing, and in unsheltered settings, the primary cause of homelessness was related to housing loss. The PIT count revealed the racial discrepancies remained, with Black/African American residents of Oakland represented 21.8% of the general population yet accounted for 52.5% of the homeless population.

### **POINT-IN-TIME COUNT**

During FY 2027, OHA is committed to addressing the homelessness crisis through partnership with the local continuum of care to serve families who have been living on the streets. An inter-agency MOU is critical for success to keep formerly homeless families housed. OHA can provide housing support to families referred by the CoC, but requires the CoC to provide supportive services that are vital to keep these families housed. Based on the PIT count, 31% of homeless households reported a serious mental illness, 25% reported a substance use disorder, and 44% reported as chronically homeless. Holistic

support is critical for all participants and OHA utilizes the Family and Community Partnerships Department to provide supportive services for residents. This team works closely with partner agencies equipped with resources and has a dedicated team to support families with critical services for families transitioning out of homelessness. Having this level of support, in conjunction with housing assistance, is critical to the success of the participants in the programs.

To prevent homelessness and ensure that current participants remain housed, OHA is working to transition all Emergency Housing Voucher (EHV) families to other eligible programs. In 2021, OHA received 515 EHV to support homeless families in obtaining housing in Oakland, partnering with local agencies to ensure they had access to housing navigation support as well as other supportive services available through the CoC. In 2025, OHA had an estimated 470 EHV households on the program when it was announced that EHV funding, which was estimated to last until 2030, would run out in 2026, four years early. To prevent homelessness and prioritize keeping these families housed, OHA is focusing on transitioning these households to other programs they are eligible for in FY 2027. The EHV funding provided many types of support that are no longer available, meaning that if these families lose assistance, it may be extremely challenging to get them housed in the future without support.



OHA will continue to engage with various stakeholders, with an emphasis on increasing resident engagement in housing policy. The Resident Advisory Board (RAB) will take on a more active role in the upcoming FY to advocate for sensible housing policies at the local and national level. RAB members have consistently demonstrated an interest in developing leadership skills and gaining a deeper understanding of the agency's policies, procedures, rules, and regulations. To empower

RAB members, OHA plans to provide leadership training opportunities, legislative training, and develop new campaigns to ensure resident stories are heard at all levels of government.

OHA will continue to learn from the Stakeholder and Community Engagement (SCE) team to improve and uphold superior standards of customer service. 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 aligned 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. In FY 2027, the SCE team plans to continue tracking frequently encountered issues while providing data-driven policy and procedure recommendations to improve efficiencies throughout the agency.

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

Affordable housing production and preservation are critical steps to move the needle on reducing homelessness and also to achieve the Authority's goal of expanding access to housing for low-income people. As described in Activity #08-01, Fund Affordable Housing Development, OHA is supporting over 14 affordable housing developments, which are expected to bring over 1,500 total units to Oakland over the next three to four years. During FY 2027, OHA plans to bring over 250 of those units online to increase the number of low-income families served.



Revitalization is a powerful tool for improving long-term outcomes, particularly for children living in public housing. A recent study by Opportunity Insights found that each year of childhood exposure to a revitalized public housing site increases adult earnings by 2.8%, with children who lived in revitalized housing from birth earning more than 50% higher lifetime incomes. These gains were strongest among children who interacted more with higher-income neighbors, underscoring the importance of modern, well-integrated housing environments. This research reinforces OHA's commitment to revitalizing and modernizing its housing portfolio to promote economic mobility and long-term stability for Oakland families.

Through preservation efforts, OHA will implement the strategic plan for the rehabilitation and redevelopment of the Oakland Affordable Housing Preservation Initiatives (OAHPI) portfolio. This portfolio is composed of 1,539 project-based units across 248 scattered sites with significant deferred maintenance throughout the portfolio. OAHPI has completed deferred maintenance and capital projects at many of the properties to modernize units, but unforeseen improvements such as dry rot, window replacements,

stucco repairs, siding replacements, sewer line replacements, electrical upgrades, roof replacements, fencing, and deck repairs have increased costs by an estimated 30%. These types of repairs and increased costs indicate a strategic approach is necessary to preserve the affordable housing sites that are 52 to 57 years old. OAHPI has identified a number of properties in need of major demolition rehabilitation, while others are in need of a full modernization. OHA will use MTW funds with Board approval to ensure the OAHPI portfolio remains safe, decent, and sanitary for residents while implementing the multi-year strategic plan to make improvements and preserve these PBV sites.



OHA will continue to utilize MTW flexibility in new ways to support ongoing development. In FY 2027, OHA will establish Oak Lending Edge Affordability Fund (OakLEAF), a new affordable housing accelerator fund, to provide eligible projects with a range of funding supports to increase the affordable housing stock long-term. This fund will provide affordable housing developers with an efficient and sustainable way to distribute funds for acquisitions and the predevelopment, rehabilitation, construction, and operation of affordable housing developments. Through OakLEAF, OHA will assist more low-income families and increase housing choices. For more information on this new funding source, please see Activity 08-01.

Utilizing the established partnership with The Kelsey, OHA plans to prioritize increasing housing access for families. The Kelsey, in collaboration with Mikiten Architecture, released housing standards to increase accessibility to housing for both rehabilitation and new unit construction. These design standards equip designers, builders, and developers with a set of standards and a new framework for accessibility-forward design to improve housing quality and housing options for all people. OHA is exploring ways to encourage use of these standards to go above and beyond in affordable housing.

By developing a strategic approach and ensuring policies are aligned with the agency's short- and long-term development goals, OHA will be well-positioned to seize new opportunities, complete long-term, multi-year development projects, and expand service-enriched housing.

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



In FY 2027, OHA will strengthen connections between participants and community support, both within the Agency and through external partnerships. A key priority is increasing community engagement and participation at internal events that promote economic, educational, and professional development, fostering self-sufficiency among participants. To boost utilization, OHA will enhance cross-departmental collaboration and expand outreach efforts through targeted advertising.

While OHA has many resident-facing staff departments that are responsible for resident engagement, including Leased Housing, Property Management, OHA Police Department (OHAPD), and the Stakeholder and Community Engagement (SCE) Team. The Family and Community Partnerships (FCP) Department is responsible for facilitating regular and meaningful engagement with participants.

The FCP team will continue to promote new and existing programs to address the needs of OHA participants designed to meet the diverse needs of OHA participants. These programs deliver impactful services ranging from short-term to long-term support, including emergency interventions for families in crisis. OHA's efforts focus on helping families secure housing, and equally as important, ensuring they remain housed in safe and stable homes. Participants have access to a wide array of programs tailored to youth, parents, adults, and seniors. The holistic services address educational and employment goals, as well as essential needs such as food security, mental health, parenting support, and wellness checks, all made possible through MTW single fund flexibility. Many of these initiatives are detailed in the 'Use of Single Fund Flexibility' section, which outlines activities aimed at enhancing services, community engagement, and resident safety.



During FY27, OHA will support families through the Digital for All project to provide free internet access at more OHA sites, expanding the program to Adel Court. Since Adel Court is a remaining public housing site without free high-speed internet, the Authority solicited quotes for an experienced firm to build, install, service, and provide wireless internet (WI-FI). The Authority is currently working on finalizing the procurement process, which will result in free high-speed internet service to seniors residing at Adel Court. In conjunction with this program expansion, OHA will assist families who have fallen behind on internet payments, as described in the Single Fund Flexibility section.

# EAST OAKLAND WORKS

A JOBS PLUS INITIATIVE

Now entering the final year of this four-year grant, OHA continues to utilize the FY2023 Jobs Plus Grant to help East Oakland public housing residents—primarily at Lockwood Gardens—overcome barriers to employment. The grant provides \$2.3M in funding from HUD, supported by a matching commitment of \$2.3M from partners such as the Oakland Private Industry Council, Lao Family Community Development Center, Oakland Adult and Career Education, Tech Exchanget, and Everyone On, as well as MTW single fund flexibility. Through the first two years of the grant, the program has successfully obtained \$573,289.73 in matching funds.

By supporting East Oakland Works (EOW), the FCP department provides individualized case management, financial literacy education, and resources to address challenges such as childcare, limited digital literacy, transportation needs, and accommodations for individuals with disabilities. Specifically, this grant aims to enroll 282 Lockwood Gardens residents in the Jobs Plus Earned Income Disregard (JPEID), complete 229 assessments, and provide post-assessment services to 212 Jobs Plus participants.

The award-winning Oakland Housing Authority Police Department (OHAPD) will continue to support OHA families under the leadership of the new Chief of Police. OHAPD will continue to strive for safe and healthy communities through a variety of services and utilize new and exciting technology to improve OHA sites

While safety is the main goal of OHAPD, they also value community building and relationships built with participants. OHAPD regularly engages with families through community events to build trust and relationships. These events include Coffee with a Cop, the Winter Wonderland Toy Drive, and many youth field trips. The relationships allow the officers to provide critical support to community members. Officers rely on community-based public safety strategies to provide excellent customer service to OHA residents and consistently work to reduce and deter violent crime. OHA is working on developing a citizen portal for reporting both positive and negative incidents involving officers, aiming to continue expanding community input. OHAPD plans to increase community awareness, build public trust, and focus on positive outcomes for program participants through their youth explorer program, and expand this program to additional family members through a new initiative, OHAPD Citizens' Academy.



OHA utilized MTW flexibilities to serve families using a holistic approach to housing and ensures the services are impactful and humane. OHA will continue to provide families with services to offer educational growth, employment opportunities, food support, safety, community building, and creative outlets. In FY 2027, OHA will work with departments that have low participant engagement to promote the available services and improve outcomes for all OHA families.

*Expand board knowledge of OHA and its Affiliates*



During FY 2027, OHA will facilitate opportunities for the Board of Commissioners (board) to broaden their knowledge base. OHA will expand board knowledge through increased training opportunities for board members, focusing on local and federal policies, MTW flexibilities, and expanding its training efforts to offer informational learning

sessions both internally and through partnerships with industry groups. These training courses will cover legislative updates, programmatic requirements, and financial management, thereby strengthening staff expertise and organizational capacity to adapt to regulatory changes.

Expanding use of functional dashboards to new programs in 2027 is a priority to increase transparency and clarity for internal and external reporting. By prioritizing creation and implementation of dashboards, OHA will provide improved visuals to enhance stakeholder understanding of program outcomes. In FY 2027, policy refinement and operational streamlining to allow greater efficiency transparency and community impact.

In anticipation of new regulations and guidance from the current administration and HUD, the Oakland Housing Authority (OHA) remains committed to upholding full compliance with federal standards. To achieve this, OHA will prioritize comprehensive education initiatives for staff, affiliates, and the Board of Commissioners (BOC). By ensuring policies and procedures are carefully aligned with evolving requirements and clearly documented, OHA will maintain transparency and readiness for review.

## **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 2027 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 2027, 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 2027 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 2027. See Appendix D for an overview of OHA housing stock.

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		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
<b>Total Public Housing Units to be Added in the Plan Year</b>		<b>0</b>								

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

OHA received approval on the Section 18 application #DDA0008342 to dispose of 253 units in July 2018. Three senior housing sites, Oak Grove North, Oak Grove South, and Harrison Towers were the subject properties included in the application approval. The primary goal of the application was to preserve these units and address longstanding challenges arising from chronic funding gaps in the public housing program. While Oak Grove North and South have been completed and are back in service as PBV sites, OHA staff continue to work on the disposition of Harrison Towers.

Two significant challenges have delayed the project. First, changes to the State of California's tax-exempt bond allocation procedures in late 2020 caused delays in securing the bonds and 4% Low-Income Housing Tax Credits needed to finance critical repairs. And second, due to the complex seismic safety needs of the 13-story tower, OHA determined that it would be prudent to conduct a peer review of the initial seismic strengthening program. A major outcome of the peer review resulted in a change to the engineering team and a full structural re-design. Despite these setbacks, OHA staff continue to move forward with the necessary predevelopment activities, including architectural design, engineering, resident relocation, environmental mitigation planning and other necessary steps to close the construction financing and finalize the disposition of Harrison Towers.

The current target date for finalizing the disposition and closing all construction financing is December 2026, with the execution of the Agreement to Enter into a Housing Assistance Payment (AHAP) contract scheduled immediately prior to closing.

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



In June 2024, in collaboration with the owners of Lion Creek Crossing (LCC) Phase I and II, OHA closed on the Low Income Housing Tax Credit re-syndication and RAD/Section 18 conversion of 80 public housing units to RAD and 19 units to Section 18 PBVs. Construction began immediately after closing on the following major rehabilitation scope of work items: improving building waterproofing, repairing, and rebuilding balconies, repairing and replacing deteriorated wood trim and trellises, and repainting the buildings.

#### Foothill Family Apartments

OHA closed on the refinancing of Foothill Family Apartments in October 2025, which included a RAD/Section 18 conversion of 3 public housing units to RAD and 18 units to Section 18 PBVs under a combined RAD/Section 18 HAP Contract. Construction began in October 2025 and is anticipated to be completed in approximately 12 months. Rehabilitation will require temporary relocation of residents.

#### Future RAD Conversions

OHA expects to continue using the RAD/Section 18 program to convert public housing units to PBVs.

#### Lion Creek Crossing Phase III and IV

Using a similar approach to LCC Phases I and II, 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 assistance 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.

### Chestnut Court, Linden Court, and Mandela Gateway

OHA is in active discussions with the owners of Chestnut Court, Linden Court, and Mandela Gateway, three additional legacy OHA HOPE VI projects that have reached the end of their initial tax credit compliance terms, regarding the feasibility of RAD or RAD/Section 18 blend conversions. OHA may submit RAD or RAD/Section 18 blend applications for these properties during the Plan year.

### Adel Court, Campbell Village, Lockwood Gardens, Palo Vista Gardens, and Peralta Villa

OHA may submit RAD or RAD/Section 18 blend applications for Adel Court, Campbell Village, Lockwood Gardens, Palo Vista Gardens, and Peralta Villa during the Plan year. OHA may apply for a Portfolio Award including some or all of these properties, or it may submit individual applications.

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 III	37	RAD/Section 18 blend conversion
Lion Creek Crossing IV	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
Adel Court	30	RAD/Section 18 blend conversion
Campbell Village	154	RAD/Section 18 blend conversion
Lockwood Gardens	372	RAD/Section 18 blend conversion
Palo Vista Gardens	100	RAD/Section 18 blend conversion
Peralta Villa	390	RAD/Section 18 blend conversion
Total Number of Units to be Removed During Plan Year:		1,334

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

In FY 2027, OHA may award Project-Based Vouchers (PBVs) to new affordable housing projects through a competitive selection process. OHA anticipates issuing a Request for Proposals (RFP) to solicit applications for new PBV units. Additionally, OHA may utilize the competitive selection processes of other local or state public agencies for the award of new PBV units, provided that such processes meet the applicable program requirements. OHA may also make non-competitive awards of PBV units to projects in which OHA has an ownership interest. Through these mechanisms, OHA intends to allocate and award new PBV units to support the development and preservation of affordable housing that

advances program priorities, addresses identified housing needs, and ensures compliance with all applicable PBV requirements.

OHA plans to enter into Agreements to Enter Into a Housing Assistance Payment (AHAP) contracts for 175 new PBVs through continued lease-up of previously conditionally awarded units at new construction properties. OHA expects the following projects to have entered an AHAP contract by the end of FY 2027:

- 2700 International
- 500 Lake Park
- 285 12<sup>th</sup> Street
- Mandela Station Affordable
- 77<sup>th</sup> and Bancroft

Of the planned 175 units, 45 units are VASH PBV units.

Of the planned AHAPS, 61 PBVs in FY 2027 are new construction units that have previously been awarded throughout the city of Oakland Notice of Funding Availability (NOFA) and 114 are the result of a non-competitive award to Mandela Station Affordable and 77<sup>th</sup> and Bancroft.

OHA plans to award 100 PBVs through the conversion of public housing units through the Section 18 Disposition at Harrison Tower. OHA will continue to evaluate and plan the feasibility of converting an additional 187 public housing units in mixed-finance developments, including Lion Creek Crossing Phase III (37 units), and Phase IV (21 units), Linden Court (38 units), Chestnut Court (45 units), and Mandela Gateway (46 units) to PBV through the RAD and/or RAD/Section 18 Blend conversion programs.

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
2700 International	19	No	2700 International will provide affordable housing for extremely low to low-income families as well as 19 units set aside for formerly homeless veterans through 19 PBV VASH, providing 74 units of much needed affordable housing for Oakland and the Fruitvale area.
500 Lake Park Avenue	18	No	500 Lake Park Avenue in Oakland is a mixed-use affordable housing development that includes 53 rental apartments and approximately 2,500 square feet of

			retail space. The project has a conditional award for 18 PBV VASH units.
285 12th St	24	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. Additionally, OHA has also awarded 8 PBV HUD-VASH units to this property.
Mandela Station Affordable	60	No	Mandela Station Affordable is a transit-oriented, mixed-use affordable project at the West Oakland BART station. The project envisions the construction of 240 units of affordable rental apartments and approximately 16,000 square feet of neighborhood retail space. The project has a conditional award for 60 PBV units.
Harrison Tower	100	No	Harrison Tower is a 101-unit (including the manager's unit) senior public housing property. The property has been approved for a Section 18 Disposition. OHA has approved 100 PBVs to assist with the substantial rehabilitation and refinancing of the property.
77 <sup>th</sup> and Bancroft	54	No	77th and Bancroft, located at 2506 76th Avenue is currently a vacant land that will be developed by Eden Housing and The Black Cultural Community Development Corporation into a 119-unit property. 54 units will be supported by OHA with Project-based Vouchers.
Lion Creek Crossing Phase III	37	Yes	Located in East Oakland, Lion Creek Crossings is the comprehensive redevelopment and revitalization of Coliseum Gardens, formerly a distressed public housing development. This transformative development serves as a catalyst for future transit-oriented development around the Coliseum BART station in Oakland, financed as part of a HOPE VI Grant to the Housing Authority of the City of Oakland.
Lion Creek Crossing Phase IV	21	Yes	
Linden Court	38	Yes	Chestnut Linden Court includes 151 affordable rental apartments, 83 of which replaced public housing apartments, as well as 16 single-family homes.
Chestnut Court	45	Yes	
Mandela Gateway	46	Yes	Mandela Gateway Apartments consists of 168 affordable one-, two-, and three-bedroom apartments in Oakland.

			Mandela Gateway is located just across Seventh Street from the West Oakland BART Station. The complex provides 168 new affordable rental apartments, over 20,000 square feet of retail space, an outdoor play space for children, community space for residents, a landscaped town square and dedicated spaces for educational classes and after-school programs.
<b>Planned Total Vouchers to be Newly Project-Based:</b>			<b>462</b>

**Table 4: Planned Existing Project-Based Vouchers**

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP was in place by the beginning of the Plan Year.

	Property Name	Number of Project-Based Vouchers	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 Alteheim 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	27	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	55	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 the 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	23	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 the 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 the Fruitvale district of Oakland for low-income seniors. The project was leased up in 2011 with 83 PBV units.
OHA Scattered Sites (OAHPI)	1,502	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	54	Leased/Issued	No	The first phase of the Savoy project of 101 units in downtown Oakland is 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 Merrit 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	5	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	8	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	9	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	12	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 lot 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 sq ft 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 risk of 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	57	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 a 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.
Casa Suenos (formerly known as 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.
Friendship Senior Housing	34	Committed	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.
Lion Creek Crossing I	36	Committed	Yes	Located in East Oakland, Lion Creek Crossings is the comprehensive redevelopment and revitalization of Coliseum Gardens. This transformative development serves as a catalyst for

Lion Creek Crossing II	44	Committed	Yes	future transit-oriented development around the Coliseum BART station in Oakland, financed as part of a HOPE VI Grant to the Housing Authority of the City of Oakland. A public-private partnership with East Bay Asian Local Development Corporation (EBALDC) and the Oakland Housing Authority, this 10-year development built over five phases is situated around a 5.7 acre public park with a basketball court, children's play area, natural creek, 12,000 square foot community center that is home to a HeadStart center, child care center, state-of-the-art computer lab, after school program and family resource center. Lion Creek Crossings reconnected the community to transit and open space.
34th and San Pablo	25	Committed	No	This project will provide 60 new homes affordable to families with incomes up to 60% of Area Median Income. The project will also include approximately 2,500 sq. ft. of ground floor, community serving commercial space that will be home to businesses and organizations which will revitalize the surrounding neighborhood.
Longfellow Corner (formerly known as 3801 MLK)	16	Committed	No	Longfellow Corner (3801 MLK Jr. Way) will be located in the Longfellow neighborhood of Oakland on the prominent corner of Martin Luther King Jr. Way and MacArthur Ave. The proposed development will provide 77 affordable apartments for low-income households in a new, mixed-use, transit-oriented development. Thirty-four of these apartments will be dedicated to serving formerly homeless individuals and families. The project is under AHAP contract for 16 PBV units
Foothill Family Partners	21	Committed	Yes	An affordable housing project of 65 units in Bancroft district of Oakland for low-income families. The project was leased up in 2011.
	4877	Planned Total Existing Project-Based Vouchers		

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

During FY 2027, OHA will continue to support the development of affordable housing by nonprofit developers thereby significantly increasing the availability of high-

quality affordable housing for low-income families, seniors, and persons with disabilities in Oakland.

OHA anticipates helping finance six new affordable housing developments that may start construction during FY 2027. These new affordable housing developments include 500 Lake Park (53 units), 285 12th Street (65 units), Harrison Tower (101 units), 77th and Bancroft (90 units), Liberation Park (119 units), and Mandela Homes (126 units), with additional information provided in *Section IV, Activity 08-01*.

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, some of these projects may begin construction in FY 2027. In addition to the pipeline projects described above with nonprofit affordable housing development partners, OHA has also acquired 401 Santa Clara Avenue, a 103-unit building constructed in 1967. The property, located in the Grand Lake neighborhood, is well served by grocery stores, restaurants, cafes, Lake Merritt, and public transportation, and is vacant. 401 Santa Clara Avenue will require a substantial amount of rehabilitation due to smoke and some water damage from a mid-size fire; however the property also presents a rare opportunity to provide low-income persons affordable housing in a highly resourced community. During FY2027, OHA will continue architecture and engineering work for the property rehabilitation, and the Authority intends to bring on a co-developer. As acquisitions are sporadic and cannot be predicted, OHA may acquire other properties that become available during the FY.

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

OHA anticipates a \$5.9M dollar FY 2027 Capital Fund Grant which is included in the MTW Block Grant. Through use of its MTW single fund flexibility, OHA projects spending approximately \$24.4M on capital projects using MTW funds. Approximately \$5M 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. The Authority also will purchase community engagement trailers, senior and disabled vans, and mobile wellness clinics to deliver onsite services, host community meetings, and provide confidential conference space for OHA program participants.

OHA is investing \$16M in affordable housing development and preservation, including preservation at Harrison Towers and Harrison Administrative offices. OHA anticipates expending approximately \$1.3M of MTW funds on exterior and interior

building improvements at eight OHA district offices including Harrison Street and the Service Center.

Staff will use MTW funds to purchase approximately \$2.1M of information technology network security, hardware & software, vehicles, security equipment, and office equipment.

A table describing all FY 2027 Capital Expenditures is included in Appendix B.

## B. Leasing Information

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

#### Housing Choice Voucher (HCV)

In FY 2027, OHA plans to issue Housing Choice Vouchers (HCVs) to families from the newly established waitlist, opened in January 2025. These efforts will ensure OHA meets its allocated voucher capacity, reaffirming the commitment to meeting the housing needs of families in Oakland.

Based on a comprehensive review of Project-Based Voucher (PBV) awards that identified unused subsidies, OHA worked closely with PBV partners to increase utilization and ensure a higher percentage of allocated PBV assistance was being actively used to serve households. This targeted engagement and reallocation strategy resulted in improved voucher utilization across OHA's PBV portfolio.

Building on this progress, maintaining and further increasing PBV utilization will remain a core strategy in FY 2027. OHA has shifted its focus from identifying unused awards to sustaining and expanding utilization gains already achieved, with the goal of stabilizing and growing the number of households served across all PBV developments. This continued emphasis on utilization optimization is expected to yield a positive and lasting impact on voucher performance, long-term affordability, and housing stability for families.



OHA's owner incentive activities, initiated in 2018 under Activity #17-01, will continue to assist and attract property owners. OHA will continue to offer a tenant preparation and certification program, provide referral bonuses for new owner referrals, application fee assistance, and mediation benefits to improve owner satisfaction. These initiatives are

designed to recruit new and retain existing landlords, bolstering the overall success

of the HCV program. OHA remains steadfast in its mission to serve as many families as possible in Oakland through strategic partnerships and innovative solutions, fostering stability and opportunity for the community.

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

OHA has several tenant-based local, non-traditional programs to address the needs of specialized populations. Among these is the Sponsor-based Housing Assistance Program, established in 2010, which supports homeless families in encampments and emancipated foster youth exiting the criminal justice system. This program has the capacity to serve approximately 180 families monthly, with projections for FY 2027 indicating consistent service to nearly 90% of eligible families, with a goal of serving 160 on average per month. OHA plans to continue to collaborate with our partners to increase utilization to 100%. Additionally, under the Building Bridges initiative, OHA plans to serve as many eligible families per month through BB-CalWorks as referred by Alameda County, the program partner. Combined, OHA projects to serve 165 families through tenant-based local, non-traditional programs. These programs are described in detail in Section IV, Activity #11-05.

OHA also offers property-based local, non-traditional programs, with the largest share being Low-Income Housing Tax Credit units developed using MTW single fund flexibility. In FY 2027, OHA will serve approximately 227 vulnerable households through the Building Bridges initiatives. These initiatives include single room occupancy (SRO) units, shared housing and transitional units for Veterans, foster youth and other special needs populations. One program, Key to Home (BB-KTH), is a partnership with Alameda County and local service providers to offer service-enriched housing to homeless families with children. These programs are described in detail in Section IV, Activity #10-06 and #11-03.

OHA will explore a transitional housing assistance program in partnership with UCSF Benioff Children's Hospital through the awarded grant to assisting families faced with children experiencing serious or chronic illnesses where the lack of housing is a barrier to improved health outcomes.

OHA expects to reach approximately 1,750 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' current target date for finalizing the disposition and closing all construction financing is December 2026, with the execution of the Agreement to Enter into a Housing Assistance Payment (AHAP) contract scheduled immediately prior to closing, converting 100 public housing units to PBV subsidies.



In total, OHA projects that 15,772 families will be served through all OHA programs during FY 2027, as indicated in Table 5. This number reflects increases in local, non-traditional households and Housing Choice Voucher households as more units are brought online through the completion of development initiatives and the leasing up of PBV units 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 5: 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**
Public Housing Units Leased	15,528	1,294
Housing Choice Vouchers Utilized	152,628	12,719
Local, Non-Traditional: Tenant-Based ^	1,920	160
Local, Non-Traditional: Property-Based ^	19,188	1,599
Local, Non-Traditional: Homeownership ^	0	0
Planned/Actual Totals:		<b>189,264</b>
		<b>15,772</b>

\* "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 6: 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)	0	0
Property-Based	Fund Affordable Housing Development Activities (08-01) - Tax credit units in service in total through the start of FY2026	11,748	979
Tenant-Based	Local Housing Assistance Program (10-06)- LHAP, SBHAP, BB-CalWorks,	1,920	160
Property-Based	PBV Transitional Housing Programs (11-05)	600	50
Property-Based	PBV Transitional Housing Programs (11-03)	1,752	146
Property-Based	Local Housing Assistance Program (10-06) – KTH	276	23
Property-Based	Local Housing Assistance Program (10-06) – RAS	4,812	401
<b>Planned/Actual Totals:</b>		<b>21,108</b>	<b>1,759</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**

In FY 2026, OHA anticipated issuing Housing Choice Vouchers (HCVs) to families from the newly established waitlist, opened in January 2025, as part of a broader strategy to increase utilization and reach our full allocated voucher capacity. However, significant federal changes to the Emergency Housing Voucher (EHV) program required the agency to recalibrate quickly for FY 2026 and 2027. EHV, authorized under Section 8(o) of the U.S. Housing Act of 1937, are time-limited ARP-funded vouchers available only to individuals and families experiencing homelessness, at risk of homelessness, fleeing or attempting to flee domestic violence, or recently homeless with a high risk of housing instability. Due to unprecedented rent increases and a resulting rise in the per-unit cost of EHV leasing nationwide, HUD now projects that EHV funding will only sustain assistance through most of Calendar Year 2026, despite statutory authority for funding to remain available until 2030.



To avoid placing more than 400 Oakland families at risk of returning to homelessness, OHA made the strategic decision to shift focus from issuing new HCVs to instead developing and implementing a careful, phased plan to transition EHV households into the HCV program. This transition effort is resource-intensive and requires coordination across multiple operational units, owners, and partner agencies. While this shift reduces the number of families OHA can serve from the new waitlist in the near term, it ensures housing stability and prevents the displacement of some of the city's most vulnerable residents. OHA remains committed to maximizing HCV utilization and will return to broader waitlist pulls once the EHV transition is complete.

While the issuance of Project-Based Voucher (PBV) assistance has slowed in recent years, OHA has continued to strengthen its PBV portfolio. In FY 2025, OHA renewed several PBV contracts for an additional 20 years, reinforcing long-term affordability and stability for families and property owners. Building on that foundation, OHA conducted a comprehensive review of PBV awards to identify unused subsidies and assess project-level readiness.

Through this effort, OHA has seen a significant increase in PBV utilization, driven in part by renewed engagement and collaboration with development partners and property managers. These discussions have ignited a new level of coordination around occupancy management and subsidy deployment. Owners have demonstrated a strong commitment to keeping their PBV awards fully leased, which

in turn contributes to a stable and predictable utilization rate for the agency. In FY 2027, OHA plans to redeploy remaining unused awards to projects best positioned to lease quickly, ensuring that PBVs continue to serve as a critical stabilizing tool for the Oakland community.

To further address the issues with lease up and utilization, OHA will continue to provide the Housing Navigation Search Assistance Program and lease compliance support services to assist clients in locating suitable housing and remaining housed.

Historically, OHA required participants to reside in a PBV unit for a minimum of two years, rather than one, before requesting a tenant-based voucher. OHA plans to continue the policy and may maintain a waitlist of participants who request tenant-based assistance after a two-year stay in a PBV unit. This MTW adjustment aims to enhance stability in PBV units and optimize resource allocation.

## **Public Housing**

OHA will continue the planning and implementation for a major rehabilitation and disposition of multiple Public Housing sites, including Harrison Towers. To minimize impacts on residents during building modifications, OHA will utilize proven strategies from previous dispositions. OHA expects to maintain a 3% or less vacancy rate in its public housing units, not impacted by disposition, to ensure quick and efficient transfers if necessary.



## **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). SBHAP provides service-enriched housing for special needs populations who face challenges accessing the traditional Section 8 and Section 9 programs. The SBHAP partner agencies, selected for their expertise by the City, deliver intensive case management, sponsored leasing and supportive services. However, staffing challenges, including turnover and onboarding of new staff, have impacted leasing efficiency and the full utilization of resources.

### *Building Bridges*



Building Bridges SRO provides monthly operating subsidies to existing service-enriched single-room occupancy (SRO) units, shared housing and transitional housing designated for veterans, emancipated foster youth, or other special needs populations. Shared and transitional housing units tend to experience higher turnover and vacancy rates compared to other housing types, partly due to staffing challenges among some partner organizations. Despite these issues, certain partners have maintained consistent occupancy levels since the program's inception.

Under the Building Bridges-CalWORKs program, OHA provides up to two years of rental assistance for formerly homeless clients of the Alameda County Social Services Agency (ACSSA) CalWORKs. These clients, who are housed in Oakland, are employable and actively pursuing self-sufficiency through planning efforts. OHA anticipates stable leasing activity for this program in FY 2027, contingent on referrals from partner agencies.

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 remains open to collaboration with the City of Oakland and the California Department of Housing & Community Development through the Homekey Program, which rapidly expands housing opportunities for individuals experiencing homelessness or at-risk of homelessness. Projects under this program are subject National Environmental Policy Act (NEPA) compliance.

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

The Rental Assistance Subsidy (RAS) program will continue to support affordable housing projects in FY 2027. RAS funds will support capital operating reserves for qualifying projects, as detailed in the Use of Single Fund Flexibility section. Eligible projects must meet NEPA and Housing Quality Standards (HQS) requirements and undergo subsidy layering reviews where necessary. Projects slated to use this funding are described in more detail in Section IV, Activity #10-06.

## C. Wait List Information

Table 7: 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	5,000	Closed	No.
Housing Choice Voucher: Project-Based - OHA Managed	Site-Based	150	Closed	No.
Housing Choice Voucher: Project-Based- Third Party Managed	Site-Based (Third Party Managed)	56,507	Open	Yes, anticipating open waitlists at certain sites this FY. Some sites continuously open.
Public Housing - OHA Managed	Site-Based (OHA Managed)	149	Closed	No.
Public Housing- Third Party Managed	Site-Based (Third Party Managed)	1,250	Open	Yes

Table 8: 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	This waitlist will not be opened during FY 2027.
Housing Choice Voucher: Project-Based - OHA Managed	OHA may explore continuously open waitlists for certain bedroom sizes and may also group applicants by bedroom size requirements. OHA does not anticipate opening this waitlist but will open waitlists as needed.
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. Additional waitlists will be opened as needed.

Public Housing - OHA Managed	Some waitlists may be combined to improve efficiency. OHA does not plan to open this waitlist during the FY, but will open waitlists as needed.
Public Housing- Third Party Managed	Waitlists will be open for all bedroom sizes for Lion Creek Crossing phases III and IV. 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.

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

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

**Table 9: Proposed MTW Activities**

**Proposed MTW Activities: HUD approval requested.**

Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
27-01	2027	Direct Rental Assistance	OHA will establish a pilot program in partnership with a research consulting firm to examine how an alternative approach to housing assistance, known as Direct Rental Assistance (DRA) could improve lease up times, reduce staff administrative burden, empower participants and improve participants' housing experience. DRA strives to treat recipients as closely as possible to unassisted renters while still adhering to required federal regulation.	Increase housing choices	Attachment C. D.3.

## **MTW Activity #27-01: Direct Rental Assistance**

### **A. Describe the Proposed Activity**

While the Moving to Work (MTW) demonstration has three distinct statutory objectives to achieve efficiency and cost effectiveness of federal expenditures, increase self-sufficiency in families with children, and increase housing choice for low-income participants, the demonstration has gained the reputation of being America's housing policy lab by testing innovative, locally designed housing strategies that improve outcomes for low-income people. As a MTW agency, the Oakland Housing Authority (OHA) remains committed to driving innovation through enhanced, data-driven program development, which also is one of its multi-year goals. With the flexibility of MTW, the Authority has the opportunity to explore novel strategies of housing assistance, such as Direct Rental Assistance (DRA), that may lead to improved outcomes for participants.

To that end, OHA plans to work with a research consulting firm and other housing organizations to examine how DRA could improve lease-up times, reduce staff administrative burden, empower participants with their housing choice, and improve participants' overall housing experience. The United States Department of Housing and Urban Development (HUD) expressed its interest in the potential impacts of DRA, as did other public housing authorities (PHAs) that plan to explore DRA as an additional form of housing assistance. HUD strongly supports PHAs and other housing stakeholders to use private funds and philanthropy to pilot DRA programs and conduct rigorous research into its feasibility and outcomes. HUD published guidance explaining that MTW agencies may use federal funds to subsidize participants of DRA pilot studies.

DRA is an alternative approach to housing assistance that strives to treat recipients as closely as possible to unassisted renters while still adhering to required federal regulations. In contrast to the Housing Choice Voucher (HCV) program, which pays subsidies to owners, DRA provides subsidies directly to participants. Under the DRA model, the PHA does not execute a Housing Assistance Payment (HAP) contract with the owner, therefore making the agreement between the participant and the property owner the primary governing document.

The goals underlying DRA policy design include the following:

- Speeding up lease-up time by simplifying processes
- Reducing the administrative burden on all stakeholders including HUD, PHAs, owners, and participants
- Broadening participants' choices
- Minimizing source-of-income discrimination by owners

- Allowing participants to more naturally drive the rental market
- Providing a more autonomous method for participants to receive assistance

Currently, HCV holders across the nation have an average success rate of only about 60% in finding owners who accept vouchers. Meanwhile, PHAs spend an average of 13.8 hours per voucher per year on administration. OHA plans to evaluate how DRA could improve these metrics for our Oakland community specifically.

### Collaborative Research & Pilot Study

OHA plans to collaborate with a research consulting firm to pilot a DRA policy where it will be tested with actual participants. A will offer DRA subsidies to each household enrolled in the pilot for at least two years. The evaluation will assess policy operations during that period and will estimate the policy's impacts over a somewhat longer period. Individuals in either research group will be fully informed about the research and must provide informed consent. For the pilot study, the MOU will permit sharing data at an individual-level with the research consulting firm, which will be strictly protected and will not be released publicly. The study aims to include approximately 1,000 participants across all participating housing authorities. OHA will determine how many participants to enroll in the study based on voucher issuance rates and the level of interest among participants. OHA anticipates initiating enrollment of participants and disbursement of subsidies for the pilot study in FY 2027.

### Policy Design Features

#### *Eligibility*

Eligibility criteria will be the same for DRA as for HCV recipients, as outlined in the Administrative Plan.

However, there will be eligibility limitations for participation in the pilot study overall. Only new applicants from the 2025 HCV waitlist who are being offered a voucher will be invited to participate in the pilot study. As OHA contacts applicants to offer them a voucher, we will provide detailed information regarding the pilot study and invite them to participate. Recipients must provide informed consent in order to participate. After consenting, the research team will randomly assign them to one of two experimental groups: the DRA group or the HCV group. As implied, the DRA group will receive DRA subsidy, while the HCV group will receive a standard HCV subsidy as any other HCV recipient would. In contrast to other HCV-holders, both groups' data will be included in the research. Vouchers will NOT be contingent upon agreement to participate in the pilot study and there will be no penalty for refusing to participate. Voucher applicants who opt out of the pilot study will not

undergo random assignment and will be offered a regular HCV outside of the context of the study. A ‘Good Neighbor’ training course covering financial management support, budget readiness workshops, or additional clinics may be required for all enrolled participants to ensure participants are well informed of their obligations.

### *Subsidy Calculations*

Participants will be offered a HAP subsidy calculated as the payment standard minus the participant contribution (calculated as it is for the HCV program), up to the gross rent. The subsidy would not exceed the payment standard. Unlike the HCV program, the subsidy would not vary for units that rent at different levels below the payment standard (unless a smaller subsidy were needed to cover the entire gross rent). Instead, if a participant found a unit with a gross rent below or above the payment standard, the resident contribution, not the subsidy, would vary to account for the difference. The participant would have to decide whether to accept that unit or search for a more or less expensive unit, possibly in different conditions and/or in a different neighborhood. This would be consistent with DRA’s goal of increasing participants’ agency and treating them more like unassisted renters, who need to weigh how much to spend on housing versus other essential needs.

Under DRA, the subsidy calculation would not include a rent reasonableness calculation as a natural ‘shopping incentive’ will likely occur. The participant will now have to consider the trade-offs in selecting a more costly or affordable unit and if they are willing to pay a higher portion of the rent based on those trade-offs

Under DRA, the subsidy calculation would also not include the 40% affordability rule. Because the participant portion will vary as the gross rent varies, participants will be limited by the amount they are able to pay for the unit.

### *Voucher Issuance & Initial Subsidy Payment*

OHA will send recipients their first month’s payment upon issuance of the voucher. The participant does not need to have found or reported a prospective unit for this initial payment. Having money in hand may allow participants to more quickly move into a new unit.

It is possible that the initial subsidy payment will exceed the first month’s actual rent as the participant has not necessarily identified a unit yet. Subsequent subsidy payments will take the actual rent of the unit into account, avoiding any possible future overpayment (see below). However, considering the extensive extraneous costs associated with searching for and moving into new units (such as moving

furniture and missing work), any potential excess of the first payment may be considered a form of housing navigation support for the program pilot participants. This may be in addition to any security deposit assistance requested by the participant.

At the time of voucher issuance, OHA will also provide the participant with a letter confirming the subsidy for the participant to use at their discretion as proof of income when applying to units. This letter will also include:

- General information for the owner on the program requirements, especially regarding rental payments
- Contact information of a dedicated OHA staff member so that owners can report non-compliance as needed
- Information on inspections for owners

In addition, OHA will provide participants with ample resources regarding inspections to facilitate their own evaluation of prospective units.

#### *Approval of New Units*

DRA participants will be responsible for finding and applying for a unit, as well as for sending OHA the necessary documentation for the agency to approve it. OHA will approve the unit and administer one month's payment to the participant after the participant provides OHA with a copy of the unsigned lease and the unit passes an in-person PHA inspection according to standard HCV procedures.

#### *Inspections*

The schedule and procedures for inspections will be the same for DRA holders as it is for HCV holders. Accordingly, two subsequent failed inspections will require the resident to move out of the unit.

#### *Verification*

For payments after the first month, the participant must provide OHA with a copy of the signed lease and proof of first payment.

For ongoing verification after the second month, OHA may require proof of all month's payments quarterly.

#### *Recertifications*

The schedule and procedures for recertifications will be the same for DRA holders as it is for HCV holders. This includes the alternate recertification schedule currently in place; see Activity 14-01.

### *Compliance & End-of-Participation*

DRA participants will be subject to the same compliance expectations and end-of-participation procedures as HCV-holders. The exception to this is that they will be subject to an additional requirement to demonstrate that they are using their subsidy for rent through the verification procedures outlined above.

### *Data Collection: 50058s*

HUD has provided guidance as to how to enter DRA participant data into the 50058. OHA will follow this guidance.

### *Conclusion of the Pilot Study & Continued Assistance*

At the conclusion of the pilot study, all participants who continue to meet eligibility requirements will be offered a regular HCV. Those in the DRA group will receive training to help them transition.

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

This proposed activity aligns with the statutory objectives of reducing costs and achieving greater cost effectiveness in federal expenditures and increasing housing choices for low-income families. By paying subsidies to participants directly and removing the HAP contract, OHA expects to reduce administrative burden and, by extension, achieve greater cost-effectiveness. DRA will simultaneously increase housing choices for participants by removing barriers to units, such as rent reasonableness, the 40% affordability rule, and a lengthy and burdensome lease-up process.

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

OHA anticipates initiating enrollment of participants and disbursement of subsidies for the pilot study in FY 2027.

## **B. Cost Implications**

There is no cost associated with participating in the Direct Rental Assistance pilot study. Housing assistance payments for recipients participating in the study will be provided through OHA's Moving to Work (MTW) Housing Choice Voucher funding as part of the approved annual budget, while the research costs will be covered by the research consulting firm.

## **C. Need/Justification for MTW Flexibility**

OHA will use the authorization provided in PIH Notice 2011-45: Parameters for Local, Non-Traditional Activities under the Moving to Work Demonstration Program, Attachment D - Use of MTW Funds, and Attachment C. Section B and D. OHA is authorized to adopt and implement any reasonable policy to establish payment standards, rents or subsidy levels for tenant-based assistance that differ from the currently mandated program requirements. OHA plans to develop a partnership with a research consulting firm and a number of PHAs across the country to study the outcomes at a larger scale. While this is a national effort, OHA will also utilize the local outcomes to determine if this pilot is a viable, long-term, local program.

## **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 10 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).

Table 10: Approved MTW Activities					
HUD Approval Previously Granted					
Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
26-01	2026	Coordinated Housing Collaborative: Tenant-based Voucher Referrals	Allow OHA to establish a dedicated pipeline of HCVs, allocating up to 20% of new HCVs issued annually to serve homeless individuals and families referred through the Continuum of Care. This activity mirrors efficiencies and lessons learned from implementation of the Emergency Housing Voucher program and develops a solution to help make experiences of homelessness	Increase housing choices	Attachment C. D.3. (a) and (b) and D.4.

			become brief, rare, and non-recurring.		
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 Recertifications	Allow wage earning families to self-certify income decreases due to an emergency situation and have OHA pay all or a portion of a tenant's rent for the duration of the declared disaster period.	Reduce costs and achieve greater cost effectiveness	Attachment C, 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	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.11, D.2.a

			eliminates the utility allowance payment.		
14-01	2016	Alternative Re-certification Schedules	<p>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.</p>	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.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 disabled households, biennial schedule for work-eligible households.</li> <li>• Eliminate all deductions and earned income disallowance.</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

			<ul style="list-style-type: none"> <li>Recent increases in income excluded in recertification.</li> <li>Absolute minimum rent of \$25.</li> </ul>		
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 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	Increase housing choices	Attachment C, Section B.1., B.4, D.1.a, b Attachment D, Section B.2

			Program, which provides transitional service enriched housing to families returning from prison to reunite with their children and other specialized populations.		
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 organized by AMP or other logical grouping.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.a, D.7
10-04	2010	Alternative Initial Rent Determination for PBV Units	Allows for the use of a comparability analysis or market study certified by an independent agency approved in determining rent reasonableness to establish the initial PBV contract rent.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.2, D.7
10-05	2010	Acceptance of Lower HAP in PBV Units	In situations where a family becomes over housed as a result of conflicting occupancy policies in the conversion from Public Housing to Section 8, this activity allows the landlord or management agent to accept a lower HAP	Increase housing choices	Attachment C, Section D.7

			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 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 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 economically self-sufficient  Increase housing choices	Attachment D, Use of Funds
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	Intervention and Stability 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 Competitive Process	Allows for the allocation of PBV subsidy to developments owned directly or indirectly, through an affiliated partner, by OHA without using a competitive process.	Reduce costs and achieve greater cost effectiveness  Increase housing choices	Attachment C, Section D.7.a
06-03	2006	Allocation of PBV Units: Using Existing Competitive Process	Allows for the allocation of PBV subsidy to qualifying developments using the City of Oakland NOFA/RFP or other existing competitive process.	Reduce costs and achieve greater cost effectiveness  Increase housing choices	Attachment C, Section D.7.b

## A. Implemented Activities

OHA is currently implementing the following activities:

Table 11 provides a list of all approved activities that will be implemented during FY 2027. 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 11: Implemented Activities**

Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
26-01	2026	Coordinated Housing Collaborative: Tenant-based Voucher Referrals	OHA will establish a dedicated pipeline of Housing Choice Vouchers, allocating up to 20% of new HCVs issued annually to serve homeless individuals and families referred through the COC.	Increase housing choices	Attachment C. D.3. (a) and (b) and D.4.
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 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 Recertificatio n Schedules	Changes reexamination of income for elderly and disabled households on	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c

			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.		
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 existing HAP contracts.	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 assistance programs to increase housing	Increase housing choices	Attachment D, Use of Funds,

			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 special populations.	Increase housing choices	Attachment C, Section B.4, D.1.a and b, Attachment D, Section B.2
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
10-05	2010	Acceptance of Lower HAP in PBV Units	In situations where a family becomes over housed as a result of conflicting occupancy policies	Increase housing choices	Attachment C, Section D.7

			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.		
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
09-02	2010	Intervention and Stability 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	Utilize single-fund budget flexibility to leverage funds to preserve affordable	Increase housing choices	Attachment D, Use of Funds

		Development Activities	housing resources and create new affordable housing opportunities in Oakland.		
06-01	2006	Site Based Wait Lists	Establishes site-based wait lists in all public housing sites, HOPE IV sites, and developments with PBV allocations.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.1
06-02	2006	Allocation of PBV Units: Without Competitive Process	Allows for the allocation of PBV subsidy to developments owned directly or indirectly, through an affiliated partner, by OHA without using a competitive process.	Reduce costs and achieve greater cost effectiveness  Increase housing choices	Attachment C, Section D.7.a
06-03	2006	Allocation of PBV Units: Using Existing Competitive Process	Allows for the allocation of PBV subsidy to qualifying developments using the City of Oakland NOFA/RFP or other existing competitive process.	Reduce costs and achieve greater cost effectiveness  Increase housing choices	Attachment C, Section D.7.b

## **MTW Activity #26-01: Coordinated Housing Collaborative: Tenant-based Voucher Referrals**

*Plan Year Approved: 2026*

*Plan Year Implemented: 2026*

*Plan Year Amended: None*

**Description/Update:** Under OHA's MTW Agreement with HUD, OHA is authorized to modify voucher program rules through exceptions to the standard HCV program, for the purposes of creating a successful program with stable landlords, high-quality properties, and mixed-income neighborhoods. OHA has designated use of housing choice voucher resources for the purpose of ending homelessness.

OHA plans to work in conjunction with the Continuum of Care to prioritize and identify chronically homeless, homeless families and other homeless populations. OHA plans to work with the Alameda County Continuum of Care and Coordinated Entry partner organizations to establish a dedicated pipeline to prioritize, identify, and serve prioritized individuals and families experiencing homelessness. By executing a Memorandum of Understanding and data-sharing agreement with organizations that provide supportive services to encourage housing stability and retention for households exiting homelessness or those who are at risk of homelessness. Mirroring successful and collaborative partnerships formed during the implementation of the Emergency Housing Voucher program, the Authority will implement this initiative as a solution and as a program efficiency to address more directly the regional challenge of homelessness. As there is a large need for vouchers for the homeless population, OHA may utilize additional partnerships with other homeless service agencies in the City and County, or other homeless service providers.

To ensure a balanced approach between addressing the urgent need for housing among Oakland's homeless population and ensuring access for families on the HCV tenant-based waitlist, OHA will implement a proportional allocation policy where the Authority will determine annually the appropriate ratio of referrals that will be accepted for every applicant from the waitlist who receives a voucher. In FY 2027, for every five newly issued HCVs, OHA will issue one voucher to a household referred from the Coordinated Entry prioritization list. By maintaining a structured ratio, OHA will serve both low-income families from the waitlist and the most vulnerable populations experiencing homelessness, ensuring that all Oakland residents have access to stable housing opportunities.

This activity aligns with the statutory objectives of reducing costs and achieving greater cost effectiveness in Federal expenditures and increasing housing choices for low-income families, particularly for those experiencing chronic homelessness. The CoC will perform an assessment of all referrals, which will reduce the barriers experienced by a searcher exiting homelessness. By establishing a dedicated pipeline of Housing Choice Vouchers for individuals referred through our local CoC, OHA can swiftly connect those in critical need with stable homes—removing impediments that often delay or prevent vulnerable households from obtaining assistance. This design also leverages supportive services and case management, which are funded by the County, to promote sustained housing stability, making it both cost-effective and people-focused.

The 2024 Point-in-Time (PIT) Count revealed a significant homelessness crisis in Oakland, with 5,485 individuals experiencing homelessness, marking a 10% increase since 2022. Oakland represents 58% of Alameda County's homeless population, despite constituting only about a quarter of the county's overall population. This disparity highlights the acute need for targeted interventions in Oakland to address the rising number of individuals and families experiencing homelessness.

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

*Planned Changes to Metrics/Data Collection:* OHA will report the outcomes of this activity in the narrative section.

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

#### **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 has no planned non-significant changes for this activity.

*Planned Changes to Metrics/Data Collection:* OHA will report the outcomes of this activity in the narrative section.

*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.	Previously Approved
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. <ul style="list-style-type: none"> <li>a) Changed name to "Section 8 Utility and Appliance Allowances for Tenant- Paid Utilities."</li> <li>b) Modified fuel types to match HUD Utility Schedule Model</li> </ul>	Previously approved

		c) As a reminder, PHA is not required to have an allowance for each of the fuel types, only those that are regionally appropriate.	
52517	HCV/PBV RTA	Modified form to <ul style="list-style-type: none"> <li>a) Change the structure types to match the 50058,</li> <li>b) Modified the fuel types to match the utility schedule,</li> <li>c) Utility responsibility chart updated – only one column to complete per utility,</li> <li>d) Added section for Agent information to be included.</li> </ul>	Previously approved
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) <p>In Part C a signature line was added.</p>	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

### 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.
- Dwelling Repair Program (formerly 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, costs related to inspections, eligible repairs, 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).
- 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 - 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.
- Ready, Set, Rent! Training Series - a four-module training series developed by OHA that serves as an owner incentive program while also benefiting searchers seeking stable rental opportunities. This initiative underscores essential skills such as budgeting, credit awareness, property maintenance, and lease compliance, enabling prospective renters to become responsible, knowledgeable tenants. By partnering with graduates of this program, housing providers gain the confidence that comes from renting to individuals who demonstrate strong financial literacy, reliable communication, and an understanding of lease obligations. Through this mutually beneficial arrangement, Ready, Set, Rent! fosters trusting relationships between owners and tenants, ultimately contributing to a more stable, supportive housing environment for everyone involved.

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 a 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 is not proposing any new owner incentives during FY 2027, but may expand existing incentives to other voucher types.

**Planned Changes to Metrics/Data Collection:** OHA will report on the number of owners who received incentives in the narrative and the number of families who benefited from these incentives.

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

#### **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. 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 in FY 2027.

*Planned Changes to Metrics/Data Collection:* OHA will continue to track the number of port requests received and the number accepted, and report these in the narrative.

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

#### **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 in FY 2027.

*Planned Changes to Metrics/Data Collection:* OHA will report on the average utility allowance by bedroom size and by family type in the narrative.

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

## **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 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 reduce instances of proposed 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 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 relating to 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 described in Activity #27-01, 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 does not have any non-significant changes to this activity in FY 2027.

*Planned Changes to Metrics/Data Collection:* OHA will continue to report on the number of families that are eligible for biennial and triennial reexaminations in the narrative of this activity but will not use the HUD standard metrics.

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

#### **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 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. Currently, 50% is the maximum percentage of the portfolio that may be project-based, in accordance with the Board of Commissioners-approved policy. OHA will use its discretion in determining the proper balance of tenant-based to project-based vouchers and as such may not seek to award PBVs up to the 50% maximum approved by the Board of Commissioners. While PBVs provide long-term affordability, OHA recognizes housing choice is a fundamental element within the HCV program. As such, OHA is conscious of the potential drawbacks of concentrating PBVs within the city and will continue to evaluate the best course of action for affordable housing in Oakland.

*Planned Non-Significant Changes:* OHA does not have any non-significant changes to this activity in FY 2027.

*Planned Changes to Metrics/Data Collection:* OHA will report these units in Table 14: Total Number of PBV Units Awarded Above the 25% Cap in this activity in the MTW Annual Report.

*Planned Significant Changes:* OHA has no significant changes planned for this activity in FY 2027.

#### **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. 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 2027.

*Planned Changes to Metrics/Data Collection:* OHA will report on the families who fall outside of the occupancy standards and received an alternative bedroom size or remained housed with this activity in the narrative section.

*Planned Significant Changes:* OHA has no planned significant changes for this activity in FY 2027.

#### **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, this remains true in FY 2027. To control demand, OHA will limit 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 2027, OHA plans to continue limiting 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 resulting in loss of opportunity for subsidy. OHA may use this standardized transfer policy to increase housing choice by offering eligible families at risk of losing their 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:*** OHA modified this activity to streamline the transfer process for eligible Emergency Housing Voucher (EHV) households to the HCV program. OHA is using this previously approved activity to continue to house current EHV participants through program transfers. Without this activity over 400 families would be at risk of homelessness. This activity supports the original intent of the EHV initiative, which was to permanently house individuals and families at risk of or experiencing homelessness, and additionally reduces unnecessary emotional, procedural, and administrative burden. Requiring families to individually reapply for housing assistance creates stress and uncertainty for households that believed they had achieved long-term stability. By streamlining the process with this activity, OHA will

improve administrative efficiency, reduce costs and increase cost-effectiveness, saving 100's of hours of staff time, in addition to increasing housing choice for low-income families.

To avoid displacement of people into homelessness as a result of an emergency, the Authority will also use this activity to offer temporary housing support to eligible low-income families displaced by building fires or other disasters, as declared by local officials.

*Planned Changes to Metrics/Data Collection:* OHA will no longer use the standard HUD metrics for this activity. OHA will report in the narrative on the number of inter-program transfers that occur as a result of this activity (emergencies, RAs).

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

#### **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 2027 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. Based on previous struggles with the local, non-traditional partner agencies, OHA projects to serve 146 families of the 163 units awarded.

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

*Planned Changes to Metrics/Data Collection:* OHA will use the narrative to describe the services provided and number of families served, both by the individual partners and the combined total of families served.

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

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

*Plan Year Approved:* 2011

*Plan Year Implemented:* 2011

*Plan Year Amended:* N/A

### **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 2027, 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 2027.

#### **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.

Through the partners listed above, OHA plans to serve 50 families. OHA will continue to evaluate partners based on their ability to refer families and provide services.

***Planned Non-Significant Changes:*** This activity remains ongoing. OHA plans to work with local government agencies, board approved partners, 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.

### **Building Bridges: Hospital to Home**

OHA launched a partnership with UCSF Benioff Children's Hospital and Oakland Affordable Housing Preservation Initiatives (OAHPI) to address the critical issue of housing insecurity faced by families with children grappling with serious or chronic medical conditions. OHA executed an MOU to accept referrals from UCSF Benioff Children's Hospital for up to 50 eligible families with children in the NICU or PICU to be placed in PBVs. OHA will provide families with a flat rent ratehousing subsidy for up to 60 months and a utility allowance for up to 24 months. To enhance the comprehensive support system, OHA will contribute supportive services, including dedicated case management through the FCP Department and offer assistance in transitioning to permanent housing.

### **Department of Justice Anti-trafficking Housing Program**

OHA received a \$600,000 grant from the Department of Justice, Office for Victims of Crime. The goal of this grant is to understand and address barriers to housing and supportive services for up to 50, transition-aged and former foster youth ages 18 to 24, who are survivors of sex and labor trafficking in Alameda County, California. The Authority's goal for this project is to formalize local partnerships to co-create survivor-centered and culturally relevant integrated housing and supportive services for survivors of human trafficking in Alameda County. These integrated, healing-focused services will be paired with low-barrier, short-term (up to 24 months) housing assistance to increase the likelihood of stability and successful outcomes for eligible participants. OHA executed an MOU with vetted grant partners to accept referrals of eligible families for HCVs, PBVs, or public housing units for this special Anti-Trafficking program. The program is expected to launch in FY 2027, once a contract and a sub-recipient agreement are in place with the funded partners.

***Planned Changes to Metrics/Data Collection:*** OHA will no longer use the Standard HUD Metrics table for reporting purposes and will use the narrative to describe the services provided, employment status, average income and number of families served, both by the individual partners and the combined total of families served.

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

#### **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:* OHA may increase this activity to report on all leveraged funds for local programs.

*Planned Changes to Metrics/Data Collection:* OHA will report funds leveraged through local partners in the narrative.

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

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

*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:* OHA will continue to provide the average earned income of households affected by this policy and report the number of families utilizing this activity in the narrative.

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

#### **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 the public housing and HCV 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 2027.

*Planned Changes to Metrics/Data Collection:* OHA will report the number of families utilizing this activity, and on the cost savings in the report narrative.

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

### **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 2027, OHA projects only 6 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 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 2027 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 to eligibility screening for an HCV at OHA's discretion. OHA plans to continue this practice during FY 2027 pending availability of HCVs. OHA is evaluating this partnership as partners have continued to struggle to serve an adequate number of families.

### **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 that serve Extremely Low-Income households at or below 30% of the Area Median Income (AMI). The RAS program is a 15-year subsidy designed to provide financial stability for projects serving Oakland's most vulnerable residents, many of whom are formerly homeless, that would otherwise operate at a deficit. RAS is thoroughly explained in the Single Fund Flexibility Section of this Plan. The following projects have received a commitment of RAS funding by OHA. The first five projects listed

below received previous funding commitments. In FY 2027, OHA will expand the program by providing funding to two new projects designed to serve extremely low-income households.

## **RAS Projects**

### Coliseum Commons (Previously known as the Inn at Coliseum Way)

Coliseum Commons, located at 4801 Coliseum Way, entails the conversion of a former motel into 36 units of permanent supportive housing (plus one manager's unit) for formerly homeless adults with incomes no more than 30% AMI. The project is a joint venture of Danco Communities and Operation Dignity. Referrals will be made through the Alameda County Coordinated Entry System (CES).

The project will also include a new resident lounge area, community kitchen, and office spaces for onsite support services and property management. Construction was completed in March 2025, and was fully leased in May 2025. The Authority committed \$4,572,041 in RAS funding for the project in January 2022.

### The Phoenix

The Phoenix will be located at 801 Pine Street in the West Oakland Prescott neighborhood. It 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 is jointly owned by East Bay Asian Local Development Corporation (EBALDC) and Allied Housing / Abode. The project achieved substantial completion in November 2025 and is actively leasing units at this time. The Authority committed \$3,112,566 in RAS funding for the project in December 2022.

### 3050 International Boulevard

3050 International is a 76-unit project being jointly developed by by Satellite Affordable Housing Associates (SAHA) and the Native American Health Center (NAHC). The project will serve serving households between 20%-50% AMI with 31 units set aside for formerly homeless persons. 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 and dental services. The project does not have a PBV award from OHA. Construction began March 2024 and achieved substantial completion in December 2025. The Authority committed \$2,538,000 in RAS funding in May 2023.

### Lakehouse – East 12th Street

Lakehouse – East 12th 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 began in April 2024 and is projected to be completed in April 2026. The Authority committed \$3,615,000 in RAS funding in October 2023, as well as a \$9,850,000 Development Loan.

### Chinatown TOD Senior Housing (formerly Lake Merritt BART Senior Housing)

Chinatown TOD Senior Housing is a 97-unit transit-oriented affordable development for low-income and formerly homeless seniors located in Oakland's Chinatown neighborhood. Forty-four units, or 45% of the total number of units, will be set aside for formerly homeless seniors. 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. Construction began in September 2024 and has a projected completion date of December 2026. The Authority committed \$7,091,000 in RAS funding in December 2026.

### Liberation Park

Liberation Park is located at 6955 Foothill Boulevard in the Eastmont neighborhood of East Oakland. Eden Housing and Black Cultural Zone are jointly proposing a 119-unit new construction affordable development for families that includes 30 units set aside for formerly unhoused households. The master project also includes a three-story market hall and cultural center to be located adjacent to the residential project that is being pursued separately by Black Cultural Zone. The Authority awarded the project a \$1,996,117 RAS in April 2025. The project is expected to receive a tax-exempt bond and 4% Low-Income Housing Tax Credit allocation on December 10, 2025. If that occurs, the project will close upon all construction financing and start construction in May or June 2026.

### Mandela Homes

Mandela Homes, located at 3650 Mandela Parkway in West Oakland, will adapt and rehabilitate the former Extended Stay America hotel to create 126 units of permanent supportive housing for formerly unhoused individuals and couples. The property is located adjacent to the East Bay Bridge shopping center, which includes a large Target

and Pak n' Save grocery store. The property is currently serving as a temporary homeless shelter while undergoing rehab in phases. It is expected to transition to permanent housing in Summer 2026. The Authority awarded the project a \$2,909,638 RAS in April 2025.

The RAS subsidy will provide funding to support families in 401 units during the FY, with an additional 245 units in the pipeline.

*Planned Non-Significant Changes:* Detailed new projects as described above.

*Planned Changes to Metrics/Data Collection:* OHA will no longer report on the standard HUD metrics but will report the number of families served through this activity in the narrative section.

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

#### **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 dis-incentivizes 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 2026.

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

*Planned Changes to Metrics/Data Collection:* OHA will provide information on average earned income, average escrow savings, attendees at self-sufficiency events, families who were removed from TANF during the FY, and program graduates using the narrative. OHA will no longer be utilizing the standard HUD metrics.

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

#### **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 2027, 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 the 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:* OHA will no longer report on the standard HUD metrics. OHA will report on the percentage of families who move within two years

in the PBV program and the average length of stay for PBV participants, with additional relevant data provided in the narrative.

*Planned Significant Changes:* OHA does not anticipate any significant changes or modifications in FY 2027.

#### **MTW Activity #09-02: Intervention and Stability Program**

*Plan Year Approved:* 2009

*Plan Year Implemented:* 2009

*Plan Year Removed From Hold:* 2026

*Description of MTW Activity:* Provide MTW assistance 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 MTW assistance will provide the necessary time to preserve the affordable housing resource.

OHA determined the need to reactivate this activity to ensure projects needing funding to provide housing stability for low-income households will be funded, with the possibility to provide long-term housing stability to prevent displacement and homelessness.

*Planned Non-Significant Changes:* OHA will be reactivating this activity during the FY.

*Planned Changes to Metrics/Data Collection:* OHA will report the number of families served in the projects that receive funding in the narrative section.

*Planned Significant Changes:* OHA does not plan on any significant changes in FY 2027.

#### **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 existing 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 development projects and initiatives include:

- 285 12<sup>th</sup> Street – Oakland-based East Bay Asian Local Development Corporation (EBALDC) is proposing to newly construct 65 affordable homes and 3,500 square feet of commercial space at 285 12<sup>th</sup> Street in Oakland's Chinatown. The site is currently vacant and centrally located in downtown Oakland near several BART stations. EBALDC expects to apply for an allocation of 4% low-income housing and tax exempt bonds in January 2026. If this application is successful, OHA expects to enter into an AHAP contract to provide PBV assistance to 16 units and HUD-VASH PBV assistance to an additional 8 units during late 2026. OHA has also conditionally awarded \$12M development loan to the project utilizing MTW funds and will purchase the site at the beginning of construction.
- Harrison Tower, located at 1619-1621 Harrison Street, was approved for a Section 18 disposition in July 2018. This project entails refinancing the property in order to execute a substantial rehabilitation of the building including significant voluntary seismic upgrades, the replacement of all building systems and updating all 101-units and common area amenities to significantly improve building safety and residents' quality of life. The project also includes seismic upgrades to the Authority's administrative headquarters located on the first and second floors of the building. 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.
- 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 2026. 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), IHO and Pacific West Companies will be jointly developing Mandela Station, a 240-unit affordable housing and transit-oriented development at the West Oakland BART station for very low-income families and formerly homeless persons. Mandela Station is part of a much larger master planned community that is projected to eventually include 520 market rate units and approximately 300,000 square feet of

office and retail space. Construction is expected to begin in June 2026 and continue for approximately two years. OHA has conditionally awarded an \$18,700,000 development loan of MTW funds and up to 60 Section 8 Project-Based Vouchers to this project.

- The Phoenix located at 801 Pine Street in the West Oakland Prescott neighborhood is comprised of 101 total newly constructed modular units, with 49 units set aside for individuals who are chronically homeless. The Phoenix also includes a 7,000 square foot community building with ample community amenities and a resident services program to offer activities and direct support services for children, teens, parents, and people with special needs. The Phoenix is a joint venture between EBALDC and Allied Housing and is an integral part of a 316-unit mixed-income, mixed-use master plan. The project achieved substantial completion in November 2025 and is currently undergoing residential lease up. OHA conditionally awarded the project a Rental Assistance Subsidy in the amount of \$3,112,566.
- 3050 International is a mixed-use 76-unit project (one manager's unit) to serve very low-income families with 40% of units (31 total) set aside for formerly homeless households, sponsored jointly by Satellite Affordable Housing Associates (SAHA) and the Native American Health Center (NAHC). The project will include ground commercial spaces for a 14,000 square foot community health and dental clinic and Native American cultural center owned and operated by NAHC. The project achieved substantial completion in December 2025 and is currently undergoing lease up. OHA conditionally awarded the project a Rental Assistance Subsidy in May 2023.
- Foothill Family Apartments – Foothill Family Apartments, LP, is a 65-unit, formerly mixed-finance affordable housing development that closed on the rehabilitation, resyndication, and RAD/Section 18 conversion of 21 public housing units in October 2025. The Project is now controlled by RAMP Housing, Inc. (60% majority member of general partner of owner limited partnership) and Oakland Housing Initiatives, Inc. (40% minority member of general partner), both affiliate entities of OHA. The rehabilitation includes the following: replacement of building systems



at the end of their useful life, dry rot repairs, accessibility improvements, and other deferred maintenance items. OHA provided a \$15 million soft loan of MTW Funds to the project, in addition to a \$900,000 ground lease loan, and an amended and recast HOPE VI loan.

- 500 Lake Park – OHA is assisting nonprofit developer, EAH Housing, with the development of a 53-unit affordable housing development at 500 Lake Park Avenue. 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 conditionally committed acquisition and development financing in the amount of \$7,500,000 to the project. The Authority will also provide 18 project-based VASH vouchers.
- 2700 International Blvd. is a 75-unit project sponsored by the Oakland-based Unity Council to serve very low-income families and veterans experiencing homelessness with incomes between 30%-60% AMI. OHA conditionally awarded The Unity Council 19 VASH vouchers and a \$3,800,000 permanent development loan. The project will include approximately 2,800 sq. ft. of community serving commercial space on the ground floor. The Unity Council recently secured an allocation of 9% tax credits and is targeting to close upon all construction financing and start construction in February 2026.
- 77<sup>th</sup> & Bancroft – 77<sup>th</sup> & Bancroft is a former public housing site now owned by California Affordable Housing Initiatives (CAHI), an affiliate of OHA. CAHI recently selected Eden Housing and the Oakland-based Black Cultural Zone Community Development Corporation as joint developers to create a new affordable housing community for very low-income seniors. OHA has conditionally committed to providing 54 project-based vouchers and a \$10,000,000 development loan to the project.
- 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 operation. The project is located in the Eastlake neighborhood one block away from Lake Merritt. OHA conditionally awarded the project a \$9,850,000 development loan and a \$3,615,000 Rental Assistance Subsidy.

- Chinatown TOD Senior Housing is a 97-unit transit-oriented affordable development for very 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 conditionally awarded the project a \$7,091,000 Rental Assistance Subsidy.
- Mandela Homes, located at 3650 Mandela Parkway in West Oakland, will adapt and rehabilitate the former Extended Stay America hotel to create 126 units of permanent supportive housing for formerly unhoused individuals and couples. The property is located adjacent to the East Bay Bridge shopping center, which includes a large Target and Pak n' Save grocery store. The property is currently serving as a temporary homeless shelter while undergoing rehab in phases. It is expected to transition to permanent housing in Summer 2026. The Authority has conditionally awarded the project a \$2,909,638 Rental Assistance Subsidy (RAS).
- Liberation Park is located at 6955 Foothill Boulevard in the Eastmont neighborhood of East Oakland. Eden Housing and Black Cultural Zone are jointly proposing a 119-unit new construction affordable development for families that includes 30 units set aside for formerly unhoused households. The master project also includes a three-story market hall and cultural center to be located adjacent to the residential project that is being pursued separately by Black Cultural Zone. The Authority awarded the project a \$1,996,117 Rental Assistance Subsidy (RAS) in April 2025. The project is expected to receive a tax-exempt bond and 4% Low-Income Housing Tax Credit allocation on December 10, 2025. If that occurs, the project will close upon all construction financing and start construction in May or June 2026.
- 3135 San Pablo in West Oakland is a 73-unit new construction affordable development for seniors including 16 units for formerly unhoused seniors and 20 units for seniors who are at-risk of being unhoused with a serious mental illness.



The project developer is a joint venture between Satellite Affordable Housing Associates (SAHA) and the St. Mary's Center. St. Mary's Center will provide robust resident support services including 1.5 FTE case management, mental health and substance abuse support, job development, health and wellness, and community building services. OHA awarded the project with a \$10,000,000 development loan in April 2025.

- 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 may 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.

Reposition Current Assets – OHA will seek opportunities to reposition existing real estate owned by OHA in order to create new high quality housing opportunities.

- Strategic Repositioning of the OAHPI Portfolio – OHA will continue to implement the strategic plan to address the deferred maintenance of scattered PBV properties in the OAHPI portfolio. The OAHPI portfolio consists of 1,539 apartments at 248 sites, with six asset management properties (AMPs) in Deep East, East, Fruitvale, San Antonio, West, and North Oakland. The properties in the OAHPI portfolio were primarily developed between 1968 and 1973 and have significant deferred maintenance across the portfolio as they are 52-57 years old. The strategy team has been identifying viable solutions to renew these properties. OHA will provide

a \$60M loan to assist OAHPI in fully modernizing this portfolio. OHA may provide additional funding to OAHPI, contingent on Board approval.

- Development and predevelopment loans, and other funding types – OHA may utilize MTW funding to support development projects in Oakland through a multitude of funding types including development loans, predevelopment loans, RAS, or gap financing to assist affordable housing development come to fruition. OHA will obtain Board approval for applicable funding.
- Financing & Partnerships – OHA will continue to provide financing to new affordable housing projects throughout Oakland through a variety of selection processes:
  - *Rental Assistance Subsidy (RAS)* – OHA has created a new financing program to provide a 15-year rental subsidy to projects that set aside a minimum of 25% of the total number of units for Extremely Low-Income households and therefore are projected to operate at a deficit. The RAS program was designed to provide support to project that would otherwise operate at a deficit. The RAS will be capitalized and 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 RAS award, development loans, or PBVs to projects that are selected for funding through City of Oakland's NOFAs. During FY2026, OHA may consider awards to projects selected by the City through its Rapid Response and Homeless Housing, New Construction, Acquisition and Rehabilitation, and Naturally Occurring Affordable Housing (NOAH) Preservation Program NOFAs.

- 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 2027, OHA may purchase the investor limited partners' interest in Keller Plaza.
- Affordable Housing Fund – OHA will create a California nonprofit public benefit corporation, named Oak Leading Edge Affordability Fund (Oak LEAF) to support affordable housing preservation and expansion in Oakland. Oak LEAF will create and administer an affordable housing fund to leverage sources of assistance and support affordable housing providers in the production, preservation, and long-term stability of housing for low-income families within Oakland. OHA will capitalize OakLEAF using a variety of funding sources including \$60,000,000 of MTW funds, which will be subject to all applicable MTW requirements. The Fund may also seek financial support from other sources including, but not limited to, the City of Oakland, the County of Alameda, the State of California, and foundations, to assist in the future capitalization of the Fund. OHA will seek Board of Commissioners approval for all applicable funds that go into OakLEAF up to \$100M.

This fund will meet the statutory objective to increase housing choices for low-income families, as well as OHA's internal goal to "Position OHA as a sustained leader in the preservation of units and expansion of affordable housing."

*Planned Non-Significant Changes:* OHA added Mandela Homes, Liberation Park, and 3135 San Pablo to the narrative above, as well as information on the new OakLEAF Housing Fund.

*Planned Changes to Metrics/Data Collection:* OHA will report on the housing units developed, indicating if they are rehabilitated units or new units, using the narrative section of the report and will not utilize the standard HUD metrics.

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

#### **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, and OHA plans to use this activity for RAD vouchers. The RAD waitlists will not be tracked separately from the site-based waitlists, there will only be one waitlist per site.

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

*Planned Changes to Metrics/Data Collection:* OHA will no longer use the HUD standard metrics to report on this activity. The average waitlist time for the OHA-managed lists will continue to be tracked, OHA will report on the number of families on the waitlist at the beginning and end of the FY.

*Planned Significant Changes:* OHA has no planned significant changes for this activity in FY 2027.

#### **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 2027.

*Planned Changes to Metrics/Data Collection:* OHA will report on projects that receive PBVs without a competitive process and why using the narrative instead of the Standard HUD Metrics.

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

#### **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 2027, 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 2027.

*Planned Changes to Metrics/Data Collection:* OHA will report on PBV awards using the narrative instead of the Standard HUD Metrics.

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

#### **B. Not Yet Implemented Activities**

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

#### **C. Activities on Hold**

**Table 12: 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)
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.
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> </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

			<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>		
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
10-07	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

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

*Description:* 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 planned 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.

After approval of this activity, HUD determined the asset limitation was an optional regulation. If OHA implements an asset limit, stated in 24 CFR 5.618(a), the limit would be adjusted from \$100,000 to \$250,000 for all OHA families. OHAs 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>1</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>2</sup> Upon utilization of this activity, 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.

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.

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

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<sup>1</sup> <https://www.rentcafe.com/cost-of-living-calculator/us/ca/oakland/>

<sup>2</sup>

*Update on Reactivation Plan:* Asset limitation is no longer a requirement, if OHA does choose to implement an Asset limitation, OHA will utilize this activity to modify the HUD regulations. OHA does not plan to use this activity in FY 2027.

### **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 2027 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 2027 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 2027.

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

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Year Placed on Hold:* 2026

*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:* OHA placed this activity on hold in FY 2027.

*Planned Changes to Metrics/Data Collection:* OHA will no longer report on this activity using the Standard HUD Metrics table but when the activity is utilized OHA will report the staff time and cost savings in the report narrative, and provide a justification of use.

*Planned Significant Changes:* OHA placed this activity on hold in FY 2027.

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

*Plan Year Approved:* 2010

*Plan Year Implemented:* 2010

*Year Placed on Hold:* 2026

*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 placed this activity on hold in FY 2027.

*Planned Changes to Metrics/Data Collection:* OHA will provide a justification in the narrative with supporting data detailed at time of utilization with number of housing units preserved.

*Planned Significant Changes:* OHA placed this activity on hold in FY 2027.

#### **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 2027 for the disposition or the RAD conversion of public housing units at Lion Creek Crossing Phases 1-4.

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

OHA does not propose to close any activities during FY 2027.

## **Section V. Planned Application of MTW Funds**

The FY 2027 Sources and Uses reflect the agency's vision for an overall operating and capital expenditure plan to preserve OHA units for sustained occupancy. OHA has developed a Sources and Uses table anticipating a reduction in Federal appropriations and keeping in mind the need to stretch funding resources to minimize disruption to existing program operations. 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 2026. 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 Fund, 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.

<b>Table 13: 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>
70500 (70300+70400)	Total Tenant Revenue	5,452,311
70600	HUD PHA Operating grants	358,945,333
70610	Capital Grants	5,944,251
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	12,227,768
71100+72000	Interest Income	8,631,876
71600	Gain or Loss on Sale of Capital Assets	-
71200+71300+71310+71400+71500	Other Income	1,267,939
<b>Total Revenue:</b>		<b>392,469,478</b>

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

At the start of FY 2027, and primarily due to the transition of EHV households to the tenant based voucher program, OHA expects HCV utilization to reach just over the 95 percent threshold. Owner incentive activities will be made available across all voucher, LNT, and public housing programs. In addition to the implementation of new and enhanced landlord incentives, OHA plans to continue the implementation of all the initiatives under Building Bridges in FY 2027. Additionally,

while the Authority's procurement and award of PBVs will slow down given future funding uncertainties, PBV projects that already received awards for in-place, 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.

The shortfall between the Sources and Uses of MTW Funds indicated in Table 12 and Table 13 is due to the MTW development obligations and capital expenditures which are described in Appendix B and Other Post Employment Benefits (OPEB) and Retiree Medical funding which are included in the "Other Expenses" FDS line item. OHA expects to fund the shortfall of expenses by utilizing its program reserves. The single fund budget will support increased resident services, with a focus on economic development and self-sufficiency.

### 3) Description of Planned Application 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.

**Table 12: Estimated Uses of MTW Funding for the Fiscal Year**

FDS Line Item	FDS Line-Item Name	Dollar Amount
91000 (91100 through 91900)	Total Operating – Administrative	60,592,535
91300 + 91310 + 92000	Management Fee Expense	268,191
91810	Allocated Overhead	0
92500 (92100+92200+92300+92400)	Total Tenant Services	2,190,383
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	2,093,398
93500+93700	Labor	0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	6,699,721
95000 (95100+95200+95300+95500)	Total Protective Services	8,047,680
96100 (96110+96120+96130+96140)	Total insurance Premiums	2,279,852
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	2,475,254
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	288,888,229
97400	Depreciation Expense	9,769,796
97500+97600+97700+97800	All Other Expenses	20,510,376
<b>Total Expenses:</b>		<b>403,815,413</b>

## Tenantable Units

A new California law, Assembly Bill 628, requires a rental unit, for leases entered into, amended, or extended on or after January 1, 2026, to have a working stove and refrigerator, subject to certain exemptions. For a unit to be deemed tenantable (or habitable), landlords in California will be required to provide all apartments with a stove and refrigerator in good working order per AB 628. The law also states landlords are required to repair or replace a stove or refrigerator that is subject to recall. OHA will follow the state law and provide these appliances for units owned and operated by OHA.

## 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. All current projects and initiatives can be found in Activity #08-01: Fund Affordable Housing Development, and include the following:

- 285 12th Street
- 3135 San Pablo
- Harrison Street Master Planning and Strategic Redevelopment
- Chinatown TOD Senior Housing
- Harrison Tower
- 2530 9th Avenue
- Mandela Station Affordable
- 75th and MacArthur
- The Phoenix
- 1236 East 17th Street
- 3050 International
- Foothill Family Apartments
- 500 Lake Park
- 2700 International Blvd.
- 77th & Bancroft
- Lakehouse East 12th Street
- 1236 East 17th Street
- Mandela Homes
- Liberation Park

- 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.

Reposition Current Assets – OHA will seek opportunities to reposition existing real estate owned by OHA in order to create new high quality housing opportunities.

- Strategic Repositioning of the OAHPI Portfolio – OHA will continue to implement the strategic plan to address the deferred maintenance of scattered PBV properties in the OAHPI portfolio. The OAHPI portfolio consists of 1,539 apartments at 248 sites, with six asset management properties (AMPs) in Deep East, East, Fruitvale, San Antonio, West, and North Oakland. The properties in the OAHPI portfolio were primarily developed between 1968 and 1973 and have significant deferred maintenance across the portfolio as they are 52-57 years old. The strategy team has been identifying viable solutions to renew these properties. OHA will provide a \$60M loan to assist OAHPI in fully modernizing this portfolio. OHA may provide additional funding to OAHPI, contingent on Board approval.
- Development and predevelopment loans, and other funding types – OHA may utilize MTW funding to support development projects in Oakland through a multitude of funding types including development loans, predevelopment loans, RAS, or gap financing to assist affordable housing development come to fruition. OHA will obtain Board approval for applicable funding.
- Financing & Partnerships – OHA will continue to provide financing to new affordable housing projects throughout Oakland through a variety of selection processes:
  - *Rental Assistance Subsidy (RAS)* – OHA has created a new financing program to provide a 15-year rental subsidy to projects that set aside a minimum of 25% of the total number of units for Extremely Low-Income households and therefore are projected to operate at a deficit. The RAS program was designed to provide support to project that would otherwise operate at a deficit. The RAS will be capitalized and 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 RAS award, development loans, or PBVs to projects that are selected for funding through City of Oakland's NOFAs. During FY 2027, OHA may consider awards to projects selected by the City through its Rapid Response and Homeless Housing, New Construction, Acquisition and Rehabilitation, and Naturally Occurring Affordable Housing (NOAH) Preservation Program NOFAs.
- 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 2027, OHA may purchase the investor limited partners' interest in Keller Plaza.
- Affordable Housing Fund – OHA will create a California nonprofit public benefit corporation, named Oak Leading Edge Affordability Fund (Oak LEAF) to support affordable housing preservation and expansion in Oakland. Oak LEAF will create and administer an affordable housing fund to leverage sources of assistance and support affordable housing providers in the production, preservation, and long-term stability of housing for low-income families within Oakland. OHA will capitalize OakLEAF using a variety of funding sources including \$60,000,000 of MTW funds, which will be subject to all applicable MTW requirements. The Fund may also seek financial support from other sources including, but not limited to, the City of Oakland, the County of Alameda, the State of California, and foundations, to assist in the future capitalization of the Fund. OHA will seek Board of Commissioners approval for all applicable funds that go into OakLEAF up to \$100M.



This fund will meet the statutory objective to increase housing choices for low-income families, as well as OHA's internal goal to "Position OHA as a sustained leader in the preservation of units and expansion of affordable housing."

### **Stability Assistance for Families Transitioning from Emergencies (S.A.F.T.E.)**

The Authority recognizes that fires and other natural or human-caused disasters may result in the sudden and unexpected displacement of people from their homes. For low-income families, that displacement, even if temporary, causes instability that can have long-lasting impacts and a high risk of homelessness. In the past, the Authority provided assistance to participant families in the voucher and public housing programs, as needed, to identify affordable housing options, afford temporary housing, and pay fees and deposits for new housing. With this use of SFF, the Authority will expand that support to non-OHA assisted low-income households temporarily or permanently displaced by a disaster in Oakland. For the purposes of this activity, disaster-displaced households are defined as low-income families that have been displaced from their primary residence due to a fire, natural disaster, or other emergency event that renders their homes uninhabitable, as declared by the Mayor, City Council, or City of Oakland Department of Housing and Community Development.

To start, the Authority will offer up to \$5,000 in assistance per household for up to 30 non-OHA households towards application fees, deposit and/or first month's rent assistance, furniture and appliance replacement, and initial move-in costs. The purpose of this assistance is to help stabilize the immediate housing conditions of a family facing unanticipated housing costs due to the disaster. Modifications to the per household and/or annual amount available will be modified at the discretion of the Executive Director, or her designee, up to her expenditure authority, and if in excess of \$250,000, with approval by the Board of Commissioners.

The Authority will coordinate with City of Oakland partners, supportive services providers to ensure a coordinated disaster response, effective referral handoffs, seamless communication and outreach, and alignment with the direction of local officials. Additionally, staff will track outcomes such as time to secure alternative housing and the number of people prevented from becoming homeless.

### **Cultivating Thriving Residents Through Skills and Support**

The Oakland Housing Authority (OHA) aims to advance resident empowerment by implementing initiatives that support economic mobility, educational advancement, and housing stability. In FY 2027, OHA will utilize the flexibility of the MTW Single Fund to extend a wide range of programs that promote self-reliance and long-term success for up to 1,000 Oakland residents. These efforts are strategically designed to address the needs

of diverse and vulnerable populations, including foster youth, seniors, and households exiting homelessness, with the goal of ensuring participants are positioned to achieve lasting stability.

OHA's strategy is driven by innovative programmatic tools, including housing transition incentives, employment and skill development opportunities, and increased access to technology and digital resources. These initiatives are complemented by supportive services, including financial capability-building and individualized housing navigation. Together, these coordinated efforts reflect OHA's comprehensive approach to addressing resident needs and leveraging MTW flexibility to strengthen outcomes, expand opportunities, and create resilient communities throughout Oakland.

### **Key to Home**

OHA remains steadfast in its commitment to strengthening and enhancing housing security for residents across all programs. OHA will streamline the move-in incentives to expand them to property owners and residents to reduce barriers to stable housing, especially for non-MTW voucher households. Initiatives such as the Welcome Kit Incentive will continue to be a fundamental support for households in traditional programs, with a goal of distributing up to 100 welcome kits to new households during FY 2027. In addition, OHA will provide essential assistance by covering application fees and offering security deposit support of up to one month's rent for both MTW and non-MTW households.

OHA is exploring solutions to address rent arrears for at least 20% of affected households. A pilot program is under development to facilitate effective communication, case management with emphasis on financial literacy and employment development to create employment opportunities, which will allow participants to increase their income to pay a percentage towards resolving outstanding debts through structured repayment agreements. This pilot program will allow households the opportunity to reduce or eliminate their rent balance and sustain their tenancy.

To further enhance housing security, OHA will continue to support participants who benefited from Emergency Housing Vouchers (EHV), even after their funding has concluded. These participants will retain access to essential services, including housing navigation assistance, owner and resident incentives, security deposits, and essential living kits, sustained through the flexibility of MTW funds.

In addition, OHA is exploring advancements in its Opportunity to Own (O2O) Program, formerly known as the Homeownership Program, to support long-term housing stability. The Key to Independence Initiative is designed to gradually transition homeowner program participants off their Housing Assistance Payments (HAP) mortgage subsidy to assume full fiscal responsibility without the HAP assistance throughout the remaining years of their mortgage loan. In addition, to ensure a smooth adjustment to financial independence program participants will receive a bi-annual financial screening, which offers budget workshops, estate planning, and home repair resources. FY 2027, OHA will plan to launch the Key to Independence Initiative, equipping homeownership graduates with skills and resources to independently manage their mortgage obligations and achieve sustainable homeownership.



### **Education Initiative Program**



FCP will continue to strengthen and advance educational outcomes through the Education Initiative Program aimed at driving meaningful, measurable improvements for school-aged children living in OHA properties or receiving subsidized housing assistance. The program focus is centered on five core goals and key objectives: improving daily school attendance, ensuring timely enrollment for pre-kindergarten and kindergarten students; achieving grade-level literacy proficiency by third grade; increasing high school graduation rates; and preparing students for college and/or career readiness pathways at every stage of a student's academic

journey. In FY 2027, the Education Initiative Program will continue to support the 100 participants currently enrolled in the program.

Oakland Promise Plus Program initially operated under a "K-12 Feeder School Model," providing comprehensive support to children from resident families throughout their educational journey. OHA has built strong partnerships with 12 Oakland Unified School District (OUSD) schools, targeting areas with high rates of chronic absenteeism and academic challenges. In FY 2027, Promise Plus plans to expand our program and services to additional schools within the OUSD system to increase enrollment by 100 new students.

OHA will assign a Resident Community Service Coordinator (RCSC) to work collaboratively with school staff and OHA families. The RCSC will actively engage with students by monitoring attendance, evaluating academic performance, conducting regular check-ins with families, organizing literacy events, and offering additional resources as needed.

By leveraging facilities and resources, OHA aims to deliver high-impact results for students from pre-K through 12th grade. OHA will continue to offer a range of educational supports, scholarship opportunities, and progress-oriented events for OUSD-OHA students in FY 2027. The initiative also emphasizes health and wellness, promoting a holistic approach to student success. Parents and other family members will be invited to participate, fostering a collaborative environment for maximum impact.



Additionally, in FY 2027, OHA will continue to prioritize new initiatives such as early childhood education. Plans are in development to offer pre-K summer camps to accommodate up to 50 families, gradually integrating educational and social activities into young children's lives. Parents will have opportunities to access educational materials, support their child's transition to kindergarten, and participate in pre-enrollment tours of OUSD schools, ensuring a smooth start to their child's educational journey.

### **Youth Rising, Futures Thriving (Youth Empowerment)**

Resident Community Service Coordinator (RCSC) will continue to support, inspire, and fuel the dreams of OHA youth throughout the year, with a strong focus on summer extracurricular activities for students in grades K–12. These extracurriculars offer meaningful programming and enriching opportunities to engage outside the classroom. To

further promote academic success and encourage consistent school attendance, OHA will host its annual Back-to-School events and plans to increase engagement with 100 new students. OHA plans to provide a total number of 300 backpacks, along with school supplies and clothing to OHA families in FY 2027.

RCSCs will offer a range of educational field trips and enrichment activities, including a week-long overnight summer camp in collaboration with the Boys and Girls Club, as well as college tours that encourage post-secondary aspirations. OHA would like to expand summer activities in FY 2027 by exploring different educational enrichment camps.

OHA will continue to establish new partnerships with other community-based organizations that complement the vision and leverage their resources to strengthen the Education Initiative.

OHA established a new partnership with ARDE Kids, an organization that offers impactful, enriching programs that inspire students to develop new passions and interests. An RFP released in FY 2025 will be implemented in FY 2027 to expand FCP's afterschool opportunities. The collaboration with ARDE Kids will create a safe environment for students to participate in academic, recreational, and social activities after school, empowering them to become tomorrow's leaders. FCP aims to provide after-school programming to 128 students a year via this partnership.

### **Digital Literacy**

Oakland Housing Authority remains committed to closing the digital divide by providing enhanced internet connectivity, expanding access to technology, and providing digital literacy training for residents.

In FY 2027, OHA plans to continue the Digital for All Project. OHA plans to distribute up to 100 additional modems to public housing residents to obtain internet access while exploring ways to expand the program to other OHA sites, ensuring more residents benefit from reliable internet access.



OHA launched the Digital for All Project, providing free high-speed internet at four public housing sites: Lockwood Gardens, Peralta Village, Palo Vista, and Campbell. This initiative effectively reduced financial burdens at the four public housing sites while fostering improved connectivity and opportunities for digital engagement. OHA will expand the free high-speed internet program to Adel Court in FY 2027. In September of 2025, the Authority solicited quotes for "Managed Wi-Fi for Adel Court" to select an experienced firm to build, install, service, and provide wireless internet (WI-FI). The Authority is currently finalizing the procurement process, which will result in free high-speed internet service to seniors residing at Adel Court.

As part of this effort, OHA will continue to provide up to \$600 per household to help families address unpaid internet bills, ensuring continued access to essential online resources. To support digital literacy, OHA offers ongoing training for residents, focusing on both adult education and youth development. Learning labs and free Wi-Fi at public housing sites further enhance access to technology and educational opportunities.

To further improve connectivity, OHA will continue to seek and establish new partnerships with organizations that offer digital literacy classes to host quarterly literacy training for OHA residents at the West and East District offices. OHA will seek and apply for grant funds to purchase computer devices, and use refurbished OHA laptops and computers, to establish a device lending library allowing public housing families to borrow laptops and other devices as needed.

## Promoting Self-Sufficiency



The Family Self-Sufficiency (FSS) Program has successfully doubled its enrollment, now serving 300 participants, including 65 foster youth through the Family Unification Program (FUP) and the Foster Youth to Independence (FYI) initiative. The FUP and FYI program has achieved 98% voucher utilization, underscoring its role in fostering economic stability and independence for this group of young people.

The updated Family Self-Sufficiency Action Plan introduces a tiered escrow model, enhancing financial benefits and making it easier for participants to earn escrow and work toward independence. FCP will host monthly engagement events and activities to promote community building, knowledge sharing, and practical skill development.

Employment services are a cornerstone of the program, supported by two Computer Learning Labs in our West and East District Offices. These labs were established through the Jobs Plus grant program and are equipped with 16 computers and 16 laptops, WI-FI, printers, and accessible features. They will continue to serve as hubs for professional development, offering learning labs with seminar workshops and job skills training courses in FY 2027.

Additionally, the FSS program plans to continue offering a range of economic development activities, including job fairs, job readiness, job retention training, and small business development workshops during FY 2027. OHA will explore plans to scale its small business resources program to provide OHA residents with tools and guidance to launch, scale, and sustain successful entrepreneurial ventures.

To increase awareness and visibility of available services, OHA staff will connect with residents through the Leased Housing Department interactions with families at recertification, mailers, the website, and tenant portal when feasible. This engagement will help strengthen ways to connect with and support residents living in properties not managed by the Authority. OHA's Family and Community Partnerships (FCP) department will continue to share information with families about supportive services, educational

workshops, and program orientations, ensuring broader awareness of and access to available resources on our new website, partner agencies and information boards in our administrative buildings.

The FSS Program reflects OHA's commitment to empowering families, fostering self-sufficiency, and supporting long-term economic independence through innovative approaches, strategic partnerships, and participant-focused initiatives.

### **Employment Development**

FCP will continue to offer career services programs in collaboration with community colleges, community-based organizations, and other workforce development agencies in addition to co-hosting onsite job fairs, workshop trainings and resources fairs. Through these collaborations, OHA residents will gain access to career pathways enabling them to advance in the workforce and increase their household income.



OHA has a contract with Lao Family Community Development, Inc. in FY 2027 to deliver job readiness training and job search assistance to equip up to 150 OHA residents with the skills and preparation needed to obtain living-wage employment.

The Family and Community Partnerships (FCP) department launched the Jobs Plus program, East Oakland Works (EOW), in August 2023. The Jobs Plus Initiative program will enter the final year of its four-year grant term. The grant serves public housing residents of Lockwood Gardens through local job-driven approaches to increase earnings and advance employment outcomes by building work readiness, employer linkages, job placement, educational advancement, technology skills, and financial literacy.

In FY 2027, the Jobs Plus -EOW program plans to close-out the end of the four-year grant by meeting the grant expectation to enroll 282 Lockwood Gardens residents in the Jobs Plus Earned Income Disregard (JPEID). East Oakland Works will continue to increase the volume of the following: 229 complete assessments and 212 post-assessment surveys. Additionally, the program aims to achieve an employment rate of 45.31% among work-able residents at Lockwood Gardens and an average annual earnings benchmark of \$15,507, with at least 57 residents maintaining continuous employment for a minimum of 180 days. OHA intends to use MTW single-fund flexibility to provide matching funds for staff training and to support these outcomes through the Jobs Plus Earned Income Disregard (JPEID).

FCP will also use MTW single-fund flexibility in FY 2027 for the EOW program to connect Lockwood Gardens youth ages 14–17 to employment opportunities, including internships and job training programs. There are currently 72 youths in this age group residing at Lockwood Gardens. In FY27, EOW aims to connect eight youth to jobs or internships and enroll two youth in a job training program. Over the next year grant period, many of these youth will turn 18 and become eligible to participate fully in the EOW program. Engaging youth in workforce and educational opportunities early will support a seamless transition into EOW services once they reach adulthood and help establish a strong foundation for long-term economic stability.

### **Youth/ Young-Adult Employment Program**

Through an RFP released in FY25, OHA contracted with Youth Uprising, an Oakland community-based organization, to support youth and young adult residents with programming that offers paid employment training, job placement, and educational enrollment assistance for youth between the ages of 16 to 24. Youth participants may receive training in resume writing, interview skills, workplace communication, assistance in obtaining high school diplomas, or furthering their education by enrolling in college courses and Job placement. The Promise Plus staff will align educational support with youth employment services, creating a pipeline for youth to receive training and employment experience while achieving educational goals.

### **Opportunity to Own (O2O) Program (Homeownership Program)**

OHA hired a full-time Homeownership Program Administrator to implement the Opportunity to Own (O2O) program, formerly known as the Homeownership program, to provide ongoing support to participating families. The Administrator will continue to collaborate closely with Family Self-Sufficiency (FSS) in the upcoming fiscal year. The plan is to assess participants' homebuyer readiness and enhance participant experience by ensuring access to homeownership education, credit repair services, money management skills, and financial literacy training prior to purchase. In FY 2027, the O2O program will continue to offer post-purchase education workshops in-person and virtually on a quarterly basis. The primary focus will be to ensure basic education on the following topics: home maintenance, home improvement, refinancing, budgeting, and estate planning.

OHA plans to host an annual Homeowner's Fair, which will feature vendors and partners that provide resources such as home improvement grants and estate planning services. This event will continue annually in FY 2027 and beyond. Through these post-purchase education opportunities, OHA anticipates serving a minimum of 35 homeowners during the upcoming fiscal year.

In FY 2027, O2O program will continue to inform participants, community partners and organizations of its name change, Opportunity to Own (O2O). The O2O program plans to continue monthly virtual Homeownership Information and Q&A sessions to provide families with program information and guidance. “Learning at Lunch” sessions will be held during the lunch hour to accommodate working participants. Additionally, OHA will expand its outreach by hosting in-person O2O orientations twice per year, in the summer and winter. Interested residents will continue to complete online assessments to evaluate homebuyer readiness for the next steps in the homeownership process. Through the monthly information sessions and biannual orientations, OHA anticipates serving at least 80 participants during the upcoming fiscal year.

The O2O program will be an integral piece of ensuring long-term home security for families. The official plan to introduce a five-year step-down plan, titled “Keys to Independence”, to promote stability and resident self-sufficiency. This initiative will implement a wind-down approach to gradually reduce participants’ reliance on Housing Assistance Payments (HAP), preparing homeowners to independently manage their mortgage obligations and achieve sustainable homeownership.

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

OHA will continue to offer housing navigator assistance to applicants and participants with housing search needs. OHA will continue hosting housing search workshops for voucher applicants, which offers education and guidance on locating rental units in Oakland. These workshops cover rental portfolio resume building, master rental application creation, reference support, role-playing, rental history reviews, security deposit assistance referrals, and moving support.

Beyond the workshops, dedicated staff will offer personalized assistance for up to 50 participants per year, including providing housing listings and leads. This fiscal year, OHA plans to issue a Request for Proposals (RFP) for housing search assistance. The initiative will include support for unit showings, application guidance, and enhanced collaboration with property owners, management firms, OHA staff, and service providers.

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

FCP staff will continue to support at-risk residents facing eviction by connecting them with community resources and referrals to advance housing stability and retention. Resources offered include referrals for rental and utility assistance, housekeeping counseling, intra-resident conflict mediation, employment referrals, financial education, lease violation counseling, and, upon request, supportive services such as food and cleaning supplies.

In FY 2027, FCP will explore strategies to strengthen housing retention efforts by hosting events to proactively engage residents, provide options to request lease compliance support, and offer additional supportive and enrichment services.

### **NEAT Program (Nourish, Educate, Access, Thrive)**

In FY 2027, OHA will continue partnering with the Alameda County Community Food Bank to address food insecurity across Oakland, CA. In addition to partnering with other local agencies to leverage their resources during the food pantry operation to provide information on nutrition education, health screenings, and cooking classes/techniques, under the moniker “Explore and Engage.” This initiative aims to empower residents with knowledge to make healthier dietary choices, fostering long-term improvements in community wellness.

To help reduce food insecurity and improve access to essential resources, OHA will continue to collaborate with DoorDash to deliver food to elderly and disabled residents and offer monthly transportation assistance for residents with limited access to grocery stores. The goal is to assist 150 residents a month with the “DoorDash” pantry.



OHA will explore opportunities to develop or collaborate to create health hub models near residential sites that could increase access to nutritious food and supportive resources through partnership development.

FY 2027 will present an opportunity to explore options for residents to thrive. OHA plans to promote healthier living by promoting a 5K walk for OHA families to establish the importance of physical activity and assist in incorporating healthy, sustainable living options.

### **Seniors on the Move! Socialization and Wellness Program**

FCP will continue to facilitate the Seniors on the Move program that encourages social engagement, creativity, and wellness among senior residents in OHA communities. Designed to reduce isolation and foster a sense of connection, the program offers a variety of activities such as community walks, karaoke sessions, painting workshops, outdoor field trips, and other hobbies tailored to residents' interests. In FY 2027, Seniors on the Move program will introduce participants to activities that alleviate anxiety, enhance memory, encourage physical activity, and cultivate a positive mindset.



participation in on-site activities.

To further promote health and wellness, the program collaborates with local organizations to offer health-focused events, including nutrition workshops and wellness activities. OHA also plans to expand its weekly walking groups, known as "Oakland Making Moves," to more public housing sites, encouraging seniors to stay active and connected.

By creating spaces for socialization and providing wellness support, Seniors on the Move! empowers residents to maintain an active, fulfilling, and healthy lifestyle while fostering a strong sense of community.

### **Foster Youth to Independence**

OHA will continue partnerships with the Alameda County Social Services Agency, Lao Family Community Development, Inc., and Next Step Learning Center to support the youth in the Foster Youth to Independence (FYI) program. This program provides comprehensive resources tailored to meet foster youths' unique needs, including housing assistance, employment opportunities, housing education, financial literacy, case management, stable housing, counseling, and more.

In FY 2027, OHA's efforts will remain focused on developing life and career skills for participants by facilitating workshops on resume writing, interview preparation, job search strategies, placement, and retention. These initiatives are designed to equip foster youth with the tools and confidence needed for long-term success and stability. Currently, 65 foster youth are enrolled in the Family Self-Sufficiency program (FSS), where they receive focused case management to assist them with employment, education, and vocational training and transition to stable housing.

### **Doorbell Camera Distribution**

In addition, OHA will continue to offer the Senior Dial-A-Friend Wellness Program, which provides a peer-to-peer outreach network to support and engage senior residents through a telephone call. Selected seniors serve as resident callers, making weekly wellness calls to check in with their peers, provide companionship, and share information about available programs and services. These calls not only foster a sense of connection but also encourage

Safety for families who have experienced violence remains a high priority. OHA will continue to explore implementing a program to distribute doorbell cameras to families affected by violence to enhance their sense of security.

## **Health & Wellness**



OHA is committed to enhancing residents' health and wellness by addressing both mental and physical health needs through accessible, impactful services. To support mental health, OHA is in the process of procuring a contract with an agency to provide life coaching, group support, access to licensed therapists, and a mobile crisis response team for OHA residents and employees. These services will be made available in FY 2027 through a pending RFP. The intention would be to provide residents with resources to build resilience, manage challenges, and achieve personal growth.

Recognizing dental care as a critical need, OHA plans to implement a mobile care system to bring healthcare providers, including dentists, directly to public housing sites. These mobile clinics will address barriers to healthcare, such as transportation and limited access to traditional healthcare facilities, by offering both preventive and treatment services at convenient locations.

By integrating mental and physical health services, OHA aims to promote residents' overall well-being and empower them to lead healthier, more stable lives.

## **Mobile Engagement App**

OHA will explore developing or procuring a dedicated mobile app to enhance participant engagement and accessibility. The app will provide on-demand access to program resources, personalized goal tracking, financial literacy modules, and reminders for critical deadlines. Virtual coaching features are also planned to offer tailored guidance, ensuring participants receive continuous support.

## **Community Outreach Recruitment and Engagement Trailer**

OHA will continue to explore the potential procurement of a mobile satellite office trailer to expand service delivery beyond standard hours and fixed locations. This mobile unit

would allow OHA to adjust locations as needed to respond to the evolving needs of residents and staff across OHA properties. As part of this exploration, OHA has identified that a one-time purchase cost could range from approximately \$125,000 to \$175,000, depending on the trailer's size and features. Preliminary estimates include ADA accessibility, enhanced power systems, and warranty coverage.

If pursued, a mobile satellite office would represent a strategic investment to increase flexibility, convenience, and outreach capacity for OHA staff, residents, and surrounding communities. The unit could provide dedicated meeting space at scattered sites, reducing the need for meetings in outdoor or unsuitable locations, and support on-site services such as housing application assistance, FCP program enrollment, resident mediation, and tenant conflict resolution.

## **New Initiatives for FY 2027**

### **Opportunity to Own (O2O) Program - Keep the Keys Initiative**

OHA will expand its Homeownership Incentive to reimburse property owners for additional inspections, repairs, and required certifications when selling their home to a Housing Choice Voucher (HCV) participant currently residing in the unit. Eligible reimbursement items include sidewalk inspections, sidewalk repairs and certification, smoke detector compliance, carbon monoxide detector compliance, water heater strapping compliance, OHA Housing Quality Standards (HQS)-required repairs, and replacement of inoperable refrigerators and stoves.

This expansion provides greater flexibility in utilizing the existing incentive and increases the number of homes that can meet HQS requirements, thereby expanding the pool of eligible homeownership opportunities.

### **OHA Resident Services Card**

The Oakland Housing Authority (OHA), through its Family and Community Partnerships (FCP) department, will create a Resident Services Card to streamline access to support and strengthen resident engagement. Issued to OHA residents, this card would function like a membership card, enabling seamless registration and check-in for FCP programs and events, such as the food pantry, on-site workshops, and activities. This approach reduces administrative barriers for residents while improving staff efficiency.





In addition to tracking participation in HUD-funded and OHA-supported programs, the Resident Services Card would address the challenge of capturing engagement information for residents who receive FCP services outside of HUD-funded programs, where tracking is often limited. The card will allow FCP to centrally document attendance, engagement, and participation across all services and programs. Implementation will require resident cards, scanning technology capability, and integration with OHA's existing CRM systems to ensure secure, real-time data management, improving coordination, reporting, and the delivery of equitable, resident-centered social services.

Over time, the system can be expanded to support appointment scheduling, referrals, incentives for participation, and the analysis of aggregate data to inform program design and funding application data. This initiative aims to modernize service access, enhance accountability, and deepen resident engagement, while laying the groundwork for a more coordinated, resident-centered social services ecosystem.

### **Youth Rising, Futures Thriving (Youth Empowerment) - Mini Mogul Master Class**

In FY 2027, OHA plans to launch the Mini Mogul Masterclass, a youth-focused entrepreneurial development program designed to equip students with foundational business knowledge, leadership skills, and financial literacy. The program will provide hands-on training, mentorship, and access to real-world business tools for a cohort of 15 students to support youth interested in pursuing entrepreneurship.

The Mini Mogul Masterclass is structured as a three-year program for high school students aged 15 -19 to ensure sustained engagement and long-term impact. Participants will take part in progressive workshops focused on business development, financial management, and leadership. The program will also offer guidance on obtaining an LLC and/or business license, opportunities to build professional networks with fellow entrepreneurs, and the practical skills necessary to launch and grow a small business. Priority support will be provided to participants who successfully complete all workshop modules and meet established program benchmarks.



As part of this initiative, OHA will leverage its partnership with Mini Moguls to host a series of pop-up shops showcasing products created by program participants. These events will offer youth valuable real-world sales experience while increasing community engagement. A designated percentage of proceeds from each pop-up event will be donated to the OHA Foundation to support and sustain future Mini Mogul Masterclass workshop series.

This long-term investment strengthens pathways to economic opportunity while empowering youth with the confidence, skills, and resources needed to build sustainable businesses and become future community leaders.

### **Improving the safety and security for residents and staff**

The Oakland Housing Authority Police Department (OHAPD) provides essential safety services designed to enhance the well-being of OHA sites and the surrounding communities. Activities undertaken by the Oakland Housing Authority Police Department (OHAPD) are funded through single-fund flexibilities.



The vision statement of the OHAPD remained the same for 2027. The vision of this department is to be a premier Police Department for the Oakland Housing Authority, its residents and staff; A department that proudly executes the highest ethical and professional standards in performing our duties, continuously improving upon the safety and security conditions for residents and staff, and protecting the fixed assets owned by the Authority; creating a safe, nurturing environment where children can develop their talents and abilities for the betterment of themselves and their community, an environment free from destructive influences of drugs, violence and hopelessness; using creativity, technology and training to execute our business as a progressive community-orientated Police Department, a department that continually promotes trust, relationships, cooperation and partnership with the community we serve.

In FY 2027, OHAPD will continue its commitment to ensure a safe environment for residents and staff by maintaining the department's patrol operations. The department's patrol operation is central to the goal of ensuring the safety and security of residents and staff, providing uniformed patrol officers to police OHA sites, responding to emergencies, and investigating crimes. To further support these efforts, the department plans to undertake or continue the following initiatives:

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

- Sustain the strategic collaboration with the Oakland Police Department, Alameda County District Attorney's Office, Alameda County Probation, and the City of Oakland through the Ceasefire initiative.
- Enhance patrol strategies by increasing the utilization of criminal intelligence and crime analysis.
- Maintain the operation of the communication center to ensure the residents and staff have access to the department, enabling a prompt and efficient response from patrol officers.
- Continue conducting Crime Prevention Through Environmental Design (C.P.T.E.D.) analysis of OHA sites, partnering with the Office of Property Operations and Capital Improvement Department for the implementation.

### **Using creativity, technology, and training**



OHAPD will focus on using technology to provide the best possible services to our residents and staff in FY 2027. The department will actively seek ways to improve efficiency, further its mission, and stay updated on new technologies and methods to enhance service quality. To achieve this, the department will continue to utilize real-time video monitoring of OHA sites to deter crime, enable rapid police response, and ensure resident safety.

While OHA has seen benefits to the real-time video monitoring, the Agency is also exploring improvements to the system, including autonomous video analysis, utilization of mobile platforms, and interactive features for greater effectiveness.

Researching and integrating advanced technologies, including Artificial Intelligence, will continue to be a top priority for the department. OHAPD is dedicated to exploring innovative solutions that enhance ways to improve the overall efficiency while ensuring transparency to all participants. OHAPD is evaluating new equipment and technology that minimize the necessity for, or the level of, force utilized during critical incidents to foster safer interactions, while upholding the highest professional standards.

### **Promoting trust, cooperation, and partnership with the community.**

The dominant operating philosophy of the OHAPD is community policing. The department has found great success in leveraging community partnerships in the execution of the agency's overall mission and plans to continue or expand the following programs in FY

2027. OHA establishes trust with the community through hosting and participating in various events. OHAPD will continue hosting community events, such as the Winter Wonderland Toy Drive, bike excursions, camping trips, block parties, Coffee with a Cop, and other similar activities to engage and foster relationships with residents.

The Youth Explorer program has led to great success in previous years, and OHAPD will continue this program in 2027. The program enrolls up to 22 OHA community members and increases community awareness of OHAPD and their services, while also building public trust and positive outcomes for program participants. To build upon this program, OHAPD plans to develop an OHAPD Citizen's Academy to expand program benefits from not only youth, but to their family members as well.

### **Execute the highest ethical and professional standards.**

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 that staff performance and policies are appropriate and meet or exceed industry standards. In this effort, OHAPD will work to maintain accreditation from the Commission on Law Enforcement Agencies (CALEA). CALEA is a credentialing authority whose primary mission is to accredit public safety agencies and provide agencies an opportunity to voluntarily meet an established set of professional standards.

To enhance transparency, OHAPD utilizes various tools, including body-worn cameras, Computer-Aided Dispatch (CAD), and Record Management Systems (RMS). The department will focus on partnerships by actively creating and participating in advisory groups, attending community meetings and neighborhood councils, and expanding current camera monitoring and technology.



In FY 2027, OHAPD will continue these efforts by examining if common incidents can be better handled by non-sworn staff or outside services such as the Mobile Assistance Community Responders of Oakland (MACRO). MACRO is a community response program operated by the Oakland Fire Department for non-violent, non-emergency, non-criminal requests for service. OHAPD is exploring ways to invoke their services for certain instances.

OHAPD will continue to strive to meet the highest ethical and professional standards by developing a citizen portal for reporting officer misconduct or extraordinary performance,

thereby expanding the community's ability to submit such reports. The department is also exploring the implementation of an electronic survey as a quality control measure for both dispatch and patrol. Through the use of electronic surveys, OHAPD is examining the potential to replace the current method of in-person citizen surveys for data collection. Through these efforts, OHAPD plans to maintain accreditation by the Commission on Law Enforcement Agencies (CALEA).

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

OHA is in search of funding 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 identify 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. OHA is evaluating the operational capacity and needs 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 approximately \$720,000. OHA plans to release a procurement to launch these services in FY 2027.

### **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 can 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 15th and Harrison, 285 12th Street and 500 Lake Park while exploring redevelopment of some scattered sites.

- OHA will continue to explore repositioning options for many sites in the scattered site portfolio that may include a variety of strategies to meet Oakland's needs for permanent affordable housing as described in *Activity #8-01*.
- OHA may use interagency partnerships to repurpose underutilized sites to meet Oakland's need for additional permanent affordable housing.
- OHA may 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.

### **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 from abating subsidy payments to owners who fail HQS will be allocated to assist affected residents with 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.

### **Building Bridges: Hospital to Home**

OHA launched a partnership with UCSF Benioff Children's Hospital and Oakland Affordable Housing Preservation Initiatives (OAHPI) to address the critical issue of housing insecurity faced by families with children grappling with serious or chronic medical conditions. OHA executed an MOU to accept referrals from UCSF Benioff Children's Hospital for up to 50 eligible families with children in the NICU or PICU to be placed in PBVs. OHA will provide families with a flat rent rate housing subsidy for up to 60 months and a utility assistance for up to 24 months. To enhance the comprehensive support system, OHA will contribute supportive services, including a dedicated case manager through the FCP Department, and offer assistance in transitioning to permanent housing.

### **Department of Justice Anti-trafficking Housing Program**

OHA received a \$600,000 grant from the Department of Justice, Office for Victims of Crime. The goal of this grant is to address barriers to housing and supportive services for up to 50, transition-aged and former foster youth ages 18 to 24, who are survivors of sex and labor trafficking in Alameda County, California. The Authority's goal for this project is

to formalize local partnerships to co-create survivor-centered and culturally relevant integrated housing and supportive services for survivors of human trafficking in Alameda County. These integrated, healing-focused services will be paired with low-barrier, short-term (up to 24 months) housing assistance to increase the likelihood of stability and successful outcomes for eligible participants. OHA executed an MOU with vetted grant partners to accept referrals of eligible participants for HCVs, PBVs, or public housing units for this special Anti-Trafficking program. The program is expected to launch in FY 2027.

### **Tenant Certification Trainings**

OHA plans to develop a training series that serves as an owner incentive program while also benefiting searchers seeking stable rental opportunities. This initiative underscores essential skills such as budgeting, credit awareness, property maintenance, and lease compliance, enabling prospective renters to become responsible, knowledgeable tenants. By partnering with graduates of this program, housing providers gain the confidence that comes from renting to individuals who demonstrate strong financial literacy, reliable communication, and an understanding of lease obligations. Through this mutually beneficial arrangement, Ready, Set, Rent! fosters trusting relationships between owners and tenants, ultimately contributing to a more stable, supportive housing environment for everyone involved.



### **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 signup 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.

### **Navigation and Relocation Services**

To assist families needing to relocate due to disposition, OHA provides comprehensive navigation support to residents relocating from Harrison Tower through a dedicated relocation consultant and coordinated staff assistance. The relocation consultant researches the private market to identify comparable housing units that met each family's needs, while OHA staff support residents by assisting with required paperwork and

documentation. Each household needing relocation from Harrison Towers received an individualized move plan tailored to their specific circumstances, including considerations for disabilities, medical support, and other personal needs. The relocation consultant facilitates the move from start to finish, ensuring a smooth transition, and residents are welcomed to their new homes with a hot meal upon arrival. Following the move, residents are asked to complete a customer satisfaction survey to report on the quality of the relocation experience. OHA staff continue to provide ongoing support by conducting bi-weekly follow-ups with relocated clients to address any concerns and ensure housing stability. OHA may offer this service and follow this model for future dispositions using competitive procurements.

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

The Oakland Housing Authority's 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 RAS 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: The 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 Commons, The Phoenix, 3050 International Blvd., Lakehouse – East 12th Street, Chinatown TOD Senior, Liberation Park, Mandela Homes, and projects anticipated to apply through OHA's RFP process.

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

Table 14: 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*	\$53,505,763	\$41,391,907
\$HCV Admin Fee	\$0	\$0
PH Operating Subsidy	\$11,054,594	\$11,054,594
<b>Total Revenue:</b>	<b>\$64,560,357</b>	<b>\$52,446,501</b>
Through use of the single fund flexibility made possible by MTW, OHA projects to spend approximately \$41.4 million of its reserves on development activities. They include \$23.7 million on new construction projects and \$17.7 million on rehabilitation projects		

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#### B. Local Asset Management Plan

Table 15: 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 16: 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 III and IV, Chestnut Court, Linden Court and Mandela Gate. Upon approval of the application, OHA plans to complete the RAD and/or RAD/Section 18 blend conversion. Due to timing of application submission/approval, OHA may not complete the conversions during the FY. OHA may submit RAD or RAD/Section 18 blend applications for Adel Court, Campbell Village, Lockwood Gardens, Palo Vista Gardens, and Peralta Villa during the Plan year. OHA may apply for a Portfolio Award including some or all of these properties, or it may submit individual applications.

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 2024 MTW Plan. Updates include plans for RAD/Section 18 blends for new public housing sites. OHA may apply for a Portfolio Award including some or all of the properties.

## **Section VI. Administrative**

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

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

<b>Beginning of Public Comment Period</b>	February 13, 2026	
<b>Notification sent to Community Partners</b>	February 20, 2026	
<b>Public Notice Published in Oakland Tribune</b>	February 20, 2026	
<b>Public Hearing at 1619 Harrison Street</b>	February 23, 2026	Conducted via Zoom and in-person
<b>Resident Advisory Board Meetings</b>	February 18 and March 11, 2026	Conducted via Zoom and in-person
<b>End of Public Comment Period</b>	March 18, 2026	

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

### **D. Lobbying Disclosures**

**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, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. 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. Comments regarding the accuracy of this burden estimate and any suggestions for reducing this burden can be sent to the Reports Management Officer, Office of Policy Development and Research, REE, Department of Housing and Urban Development, 451 7th St SW, Room 4176, Washington, DC 20410-5000. When providing comments, please refer to OMB Approval No. 2577-0157.

Applicant Name

Oakland Housing Authority

Program/Activity Receiving Federal Grant Funding

Moving-to-Work Demonstration Program 14.881

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  
722CE180EE194A1

Date (mm/dd/yyyy)

1/23/2026

Previous edition is obsolete

form HUD 50071 (01/14)

## DISCLOSURE OF LOBBYING ACTIVITIES

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

Approved by OMB  
4040-0013

1. * Type of Federal Action: [N/A]	2. * Status of Federal Action: [N/A]	3. * Report Type: [N/A]
<input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	<input type="checkbox"/> a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	<input 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 <b>Oakland Housing Authority</b> * Street 1 <b>1619 Harrison Street</b> Street 2 _____ * City <b>Oakland</b> State <b>California</b> Zip <b>94612</b> Congressional District, if known: <b>CA 12</b>		
<b>5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:</b>     		
<b>6. * Federal Department/Agency:</b> <b>US Dept. of Housing and Urban Development</b>		<b>7. * Federal Program Name/Description:</b> <b>Moving to Work Demonstration</b> CFDA Number, if applicable: <b>14.881</b>
<b>8. Federal Action Number, if known:</b> <b>N/A</b>		<b>9. Award Amount, if known:</b> <b>\$</b> _____
<b>10. a. Name and Address of Lobbying Registrant:</b> Prefix _____ *First Name <b>N/A</b> 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.		
* Signature: <b>Patricia Wells</b> *Name: <b>Patricia</b> Middle Name _____ *Last Name <b>Wells</b> Suffix _____ Title: <b>Executive Director</b> Telephone No.: <b>510-874-1517</b> Date: <b>1/23/2026</b>		
<b>Federal Use Only:</b>		Authorized for Local Reproduction Standard Form - LLL (Rev. 7-07)

## **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

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### 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 County 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.

**COC** – Continuum of Care

**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.

**DRA** – Direct Rental Assistance

**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.

**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

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### OHA's Planned Capital Expenditures

FY 2027 Capital Fund Expenditure Projections				
Public Housing	Development Name	Description of Work	# of Units	FY 2026
<b>Operating Capital Activities</b>				
<b>Public Housing</b>				
x	Adel Court	Common area and site improvements	30	\$645,500
x	Campbell Village	Site improvements	154	\$163,750
x	Palo Vista Gardens	Site improvements	100	\$815,000
x	Lockwood Gardens	Exterior improvements, parking lot repair & maintenance, and interior improvements	372	\$1,895,000
x	Peralta Village	Exterior improvements, interior improvements and repairs	390	\$1,468,500
<b>Total Public Housing \$4,987,750</b>				
<b>Administrative Buildings</b>				
	1600 Harrison	Building improvements		\$600,000
	1801 Harrison	Building improvements		\$250,000
	1805 Harrison	Building improvements		\$50,000
	Service Center	Building improvements		\$295,000
	1619 Harrison Admin Bldg	Administrative Building HVAC, Asphalt Reseal, EV Charging Station		\$39,000
	West Dist. Office	Building improvements		\$20,000
	East Dist. Office	Building improvements		\$40,000
<b>Total Admin \$1,294,000</b>				
<b>COCC and Other Depts.</b>				
	IT, CID, Security, Leased Housing, .	Network equipment, software purchases, emergency vehicle equipment, security equipment		\$2,141,050
<b>Total COCC and Other Depts. \$2,141,050</b>				
<b>Total Operating Capital Activities \$8,422,800</b>				
<b>Development Activities</b>				
	1621 Harrison Tower Rehabilitation	To finance the development costs for the residential portion at Harrison Tower		\$7,000,000
	1619 Harrison Administrative Offices Rehabilitation	To design, engineer, rehabilitate, and the seismic retrofit		\$9,000,000

***Total Development Activities \$ 16,000,000***

## **APPENDIX C**

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### **Project-Based Voucher Tracker**

**Project-Based Voucher Allocation Projections as of  
June 30, 2026**

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 16, 2044	Low Income Families
Altenheim Senior Housing Phase I	July 13, 2005	23	January 1, 2007	December 31, 2032	Senior
Lion Creek Crossings II	November 9, 2005	18	July 3, 2007	July 20, 2037	Low Income Families
Madison Apartments (Street Lofts)	July 13, 2005	19	April 25, 2008	June 25, 2038	Low Income Families
Lion Creek Crossings III	June 14, 2006	16	June 25, 2008	June 25, 2038	Low Income Families
Seven Directions	July 13, 2005	18	September 12, 2008	September 12, 2038	Low Income Families
Orchards on Foothill	June 14, 2006	64	November 7, 2008	April 29, 2039	Senior
Fox Courts / Uptown Oakland	December 3, 2004	20	May 15, 2009	May 14, 2044	Low Income Families / Homeless with HIV/AIDS
Jack London Gateway - Phase II	February 26, 2007	55	June 5, 2009	June 4, 2039	Senior
14 <sup>th</sup> St. Apartments at Central Station	January 22, 2007	20	November 25, 2009	November 24, 2044	Low Income Families
Tassafaronga Village Phase I	February 25, 2008	80	April 23, 2010	April 23, 2045	Low Income Families
Altenheim Senior Housing Phase II	April 28, 2008	40	April 5, 2010	April 4, 2045	Senior
Fairmount Apartments	October 24, 2008	16	March 8, 2010	March 7, 2041	Low Income Families / Persons with Disabilities
Tassafaronga Village Phase II	July 21, 2008	19	May 27, 2010	May 27, 2045	Low Income Families / Homeless with HIV/AIDS
*Harp Plaza (19)	May 24, 2010	19	August 1, 2010	July 31, 2045	Low Income Families
*Effie's House (10)	May 4, 2009	10	August 1, 2010	August 1, 2045	Low Income Families
Drachma Housing Inc	May 4, 2009	12	December 1, 2010	November 30, 2040	Low Income Families /
Drachma Housing Inc		9	March 1, 2019	March 1, 2039	Low Income Families
Foothill Family Partners	June 28, 2010	11	August 1, 2011	August 1, 2045	Low Income Families
St. Joseph's Senior Apts	May 29, 2007	83	August 22, 2011	August 22, 2026	Senior
OAHP AMP 9 - Deep East	July 27, 2009	268	May 1, 2010	April 30, 2030	Low income families/public housing disposition
OAHP AMP 10 - East	July 27, 2009	257	April 1, 2010	March 31, 2030	
OAHP AMP 11 - Fruitvale	July 27, 2009	267	January 1, 2010	December 31, 2029	
OAHP AMP 12 - San Antonio	July 27, 2009	240	May 1, 2010	April 30, 2030	

OAHPi AMP 13 - West	July 27, 2009	231	April 1, 2010	March 31, 2030	
OAHPi AMP 14 - North	July 27, 2009	239	January 1, 2010	December 31, 2029	
Lion Creek Crossings IV	April 28, 2008	10	January 13, 2012	January 12, 2027	Low Income Families
The Savoy	June 28, 2010	100	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, 2 & 3	February 28, 2011	135	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
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
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	December 5, 2016	10	September 1, 2017	September 1, 2032	Low Income Families
Seven Directions	December 5, 2016	9	December 1, 2017	November 30, 2032	Low Income Families
Adeline Street Lofts	December 5, 2016	20	March 1, 2018	March 1, 2033	Low Income Families
Rosa Park	December 5, 2016	11	February 1, 2018	February 1, 2033	Low income and homeless individuals
Madison Street Loft Apts (additional vouchers)	December 5, 2016	31	June 9, 2018	April 9, 2033	Low Income Families
Stanley Avenue Lofts	December 5, 2016	5	June 1, 2018	June 1, 2033	Low Income Families
Swan Market	December 5, 2016	8	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	9	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	July 1, 2018	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	12	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 at Acorn	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	57	July 15, 2021	July 14, 2036	Low Income Seniors (08)
Aurora Apartments	July 23, 2018	43	July 21, 2021	July 20, 2041	special needs
Fruitvale Studios	June 25, 2018	12	April 27, 2022	April 26, 2042	formerly homeless and special needs
Coliseum Place	May 23, 2016	37	May 19, 2022	May 18, 2042	Homeless, HOPWA and Low-income
Foon Lok West	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	July 7, 2023	July 6, 2043	formerly homeless/low income families
Casa Suenos	June 25, 2018	75	May 16, 2024	May 15, 2044	formerly homeless/low income families
Foon Lok East	February 26, 2018	61	August 24, 2024	August 23, 2044	Low income families
Ancora Place	April 29, 2019	31	October 8, 2024	October 7, 2044	Low income families and formerly homeless
Black Panther Apartments (7th and Campbell)	July 23, 2018 and February 1, 2019	39	November 22, 2024	November 21, 2044	Low income families and

					formerly homeless
Lion Creek Crossing Phase I RAD	NA	36	August 1, 2024	July 31, 2044	
Lion Creek Crossing Phase II RAD	NA	44	August 1, 2024	July 31, 2044	
Margaret Gordon West Port (f.k.a. West Grand and Brush)	July 23, 2018	28	May 1, 2025	April 30, 2045	Homeless
Foothill Family Apartments RAD units		3	November 1, 2025	October 30, 2045	RAD PBV
Friendship Senior Housing	April 29, 2019	34			special needs/seniors
	<b>Units under HAP Contract</b>	<b>4,816</b>			

AHAP Contracts	Date of BoC approval	# PBV Units	AHAP Contract Date	Population Served
3801 MLK Family Housing	July 23, 2018	16	May 1, 2024	families and special needs
34th and San Pablo	July 23, 2018	25	pending	Low income families
	<b>Units under AHAP Contract</b>	<b>41</b>		
Conditional Awards	Date of BoC approval	# PBV Units	AHAP Contract Date	Population Served
285 12th St	July 22, 2019	16	pending	formerly homes/low income families
additional VASH vouchers	June 27, 2022	8	pending	PBV VASH
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
Harrison Tower Disposition	August 28, 2018	100	NA	
Mandela Station	October 24, 2022	60	TBD	
77th and Bancroft	March 24, 2025	54	TBD	Low income seniors
	<b>Units with conditional award</b>	<b>341</b>		

Disposition pending and NOFA invitation and pending ORED projects

Development Name	Date of Board Approval	# of PBV Units	Contract Date	Contract Expiration	Population Served
15th and Harrison	TBD	100	pending	pending	

RAD conversion (chestnut/Linden/LLC/Mandela Gateway	TBD	286			
		386			
	<b>Total PBV units allocated</b>	<b>5,584</b>			

## APPENDIX D

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### OHA Housing Inventory

<b>FY 2027 MTW Housing Inventory</b>	
<b>MTW and Non-MTW housing stock</b>	
<b>End of FY 2027</b>	
<b>MTW PUBLIC HOUSING</b>	
<b>Large Family Sites</b>	
Campbell Village	154
Lockwood Gardens	372
Peralta Villa	<u>390</u>
	916
<b>Designated Senior Sites</b>	
Adel Court	30
Palo Vista Gardens	100
Harrison Towers	<u>101</u>
	231
<b>HOPE VI Sites</b>	
Linden Court	38
Mandela Gateway	46
Chestnut Court	45
Lion Creek Crossings Phase 3	37
Lion Creek Crossings Phase 4	<u>21</u>
	187
<b>TOTAL PUBLIC HOUSING</b>	<b>1,334</b>
<b>VOUCHER (SECTION 8) AND OTHER HUD PROGRAMS</b>	
<b>MTW</b>	
General MTW Housing Choice Voucher (HCV)	13,153
Included are Pre-2008 FUP allocation	48
<b>Non -MTW</b>	
Veterans Affairs Supportive Housing (VASH)	510
Mainstream	262
Family Unification Program (FUP)	51
Foster Youth to Independence (FYI)	74
Emergency Housing Vouchers (EHV)	435
Lions Creek Crossings Phase I & II RAD Conversion	80
Foothill Family RAD Conversion	3
Foothill Family PH Replacement	18
Non-Elderly Disabled (NED) – Non-MTW	1
Stability Vouchers	81
<b>TOTAL VOUCHERS</b>	<b>14,773</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>15,125</b>
<b>MTW LOCAL PROGRAMS</b>	
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
RAS	401
Tax Credit Units with no Traditional Subsidy	979
<b>TOTAL LOCAL PROGRAMS</b>	<b>1,876</b>
<b>Total</b>	<b>18,335</b>

## APPENDIX E

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### Comments Received During Public Comment Period

## APPENDIX F

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### Evidence of a Public Process

## **APPENDIX G**

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### **Alameda County FY 2025 Income Limits and HUD Fair Market Rents for FY 2025**



## FY 2025 INCOME LIMITS DOCUMENTATION SYSTEM

[HUD.gov](#) [HUD User Home](#) [Data Sets](#) [Fair Market Rents](#) [Section 8 Income Limits](#) [MTSP Income Limits](#) [HUD LIHTC Database](#)

### FY 2025 Income Limits Summary

FY 2025 Income Limit Area	Median Family Income <a href="#">Click for More Detail</a>	FY 2025 Income Limit Category	Persons in Family							
			1	2	3	4	5	6	7	8
Oakland- Fremont, CA HUD Metro FMR Area	\$159,800	Very Low (50%) Income Limits (\$) <a href="#">Click for More Detail</a>	55,950	63,950	71,950	<b>79,900</b>	86,300	92,700	99,100	105,500
		Extremely Low Income Limits (\$)* <a href="#">Click for More Detail</a>	33,600	38,400	43,200	<b>47,950</b>	51,800	55,650	59,500	63,300
		Low (80%) Income Limits (\$) <a href="#">Click for More Detail</a>	87,550	100,050	112,550	<b>125,050</b>	135,100	145,100	155,100	165,100



## FY 2026 FAIR MARKET RENT DOCUMENTATION SYSTEM

The FY 2026 Oakland-Fremont, CA HUD Metro FMR Area FMRs for All Bedroom Sizes

Final FY 2026 & Final FY 2025 FMRs By Unit Bedrooms					
Year	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
FY 2026 FMR	\$2,142	\$2,385	\$2,912	\$3,724	\$4,413
FY 2025 FMR	\$1,937	\$2,201	\$2,682	\$3,432	\$4,077

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

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### 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.

<b>Effective Date: Jan 1, 2026</b>	
<b>Public Housing Flat Rent</b>	
<b>Efficiency</b>	\$1,714
<b>One Bedroom</b>	\$1,908
<b>Two Bedroom</b>	\$2,330
<b>Three Bedroom</b>	\$2,979
<b>Four Bedroom</b>	\$3,530
<b>Five Bedroom</b>	\$4,060

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

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### Payment Standards



## **Oakland Housing Authority**

### **VOUCHER PAYMENT STANDARDS-2026**

Effective October 1, 2025

Bedroom Size	HUD Fair FY 2026 Market Rents	Payment Standard 110% of the Fair Market Rents
0	\$2,142	\$2,356
1	\$2,385	\$2,624
2	\$2,912	\$3,203
3	\$3,724	\$4,096
4	\$4,413	\$4,854
5	\$5,075	\$5,583
6	\$5,836	\$6,420

## APPENDIX J

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### Standard HUD Forms Modified for MTW Activities

OHA has no new modified forms to submit for approval this year.

## APPENDIX K

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### **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:

### Development #1: Linden Court

Development Name	PIC Number	Conversion Type	Transfer of Assistance
Linden Court	CA003000115	PBV	
Unit Count:	Unit Type – Pre-RAD:	Unit Type – Post RAD:	Capital Fund Attributable to project
38 Units	Family Housing	Family Housing	\$87,860
Bedroom Types:	# Units Pre Conv.:	# Units Post Conv.:	Change in # Units and why (De Minimus Reduction, Transfer of Assistance, Unit Reconfiguration:

<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> \$102,114
<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 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> \$89,272
<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

Development # 4: Lion Creek Crossing Phase 4

<b>Development Name</b>	<b>PIC Number</b>	<b>Conversion Type</b>	<b>Transfer of Assistance</b>
Lion Creek Crossing Phase 4	CA003000124	PBV	
<b>Unit Count:</b>	<b>Unit Type – Pre-RAD:</b>	<b>Unit Type – Post-RAD:</b>	<b>Capital Fund:</b>
21 Units	Family Housing	Family Housing	\$49,284
<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

Development # 5: Mandela Gateway

<b>Development Name</b>	<b>PIC Number</b>	<b>Conversion Type</b>	<b>Transfer of Assistance</b>
Mandela Gateway	CA003000117	PBV	
<b>Unit Count:</b>	<b>Unit Type – Pre-RAD:</b>	<b>Unit Type – Post-RAD:</b>	<b>Capital Fund:</b>
46 Units	Family Housing	Family Housing	\$103,690
<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	N/A

Development # 6: Adel Court

<b>Development Name</b>	<b>PIC Number</b>	<b>Conversion Type</b>	<b>Transfer of Assistance</b>
Adel Court	CA003000102	PBV	
<b>Unit Count:</b>	<b>Unit Type – Pre-RAD:</b>	<b>Unit Type – Post-RAD:</b>	<b>Capital Fund:</b>
30	Senior Housing	Senior Housing	\$125,927

<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>	27	27	N/A
<b>Two Bedroom</b>	3	3	N/A

Development # 7: Campbell Village

<b>Development Name</b>	<b>PIC Number</b>	<b>Conversion Type</b>	<b>Transfer of Assistance</b>
Campbell Village	CA003000103	PBV	
<b>Unit Count:</b>	<b>Unit Type – Pre-RAD:</b>	<b>Unit Type – Post-RAD:</b>	<b>Capital Fund:</b>
154	Family Housing	Family Housing	\$627,481
<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>	48	48	N/A
<b>Two Bedroom</b>	86	86	N/A
<b>Three Bedroom</b>	20	20	N/A

Development # 8: Lockwood Gardens

<b>Development Name</b>	<b>PIC Number</b>	<b>Conversion Type</b>	<b>Transfer of Assistance</b>
Lockwood Gardens	CA003000104	PBV	
<b>Unit Count:</b>	<b>Unit Type – Pre-RAD:</b>	<b>Unit Type – Post-RAD:</b>	<b>Capital Fund:</b>
372	Family Housing	Family Housing	\$1,548,642
<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</b>

			<b>Assistance, Unit Reconfiguration:</b>
<b>One Bedroom</b>	80	80	N/A
<b>Two Bedroom</b>	228	228	N/A
<b>Three Bedroom</b>	59	59	N/A
<b>Four Bedroom</b>	5	5	N/A

Development # 9: Palo Vista Gardens

<b>Development Name</b> Palo Vista Gardens	<b>PIC Number</b> CA003000107	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
<b>Unit Count:</b> 100	<b>Unit Type – Pre-RAD:</b> Senior Housing	<b>Unit Type – Post RAD:</b> Senior Housing	<b>Capital Fund:</b> \$394,917
<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>Zero Bedroom</b>	3	97	N/A
<b>One Bedroom</b>	3	97	N/A

Development # 10: Peralta Villa

<b>Development Name</b> Peralta Villa	<b>PIC Number</b> CA003000108	<b>Conversion Type</b> PBV	<b>Transfer of Assistance</b>
<b>Unit Count:</b> 390	<b>Unit Type – Pre-RAD:</b> Family Housing	<b>Unit Type – Post RAD:</b> Family Housing	<b>Capital Fund:</b> \$1,580,125
<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>	152	152	N/A
<b>Two Bedroom</b>	202	202	N/A

<b>Three Bedroom</b>	36	36	N/A
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In FY2025, OHA had \$4,709,312 in capital funds allocated to the ten proposed RAD sites. OHA may 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.
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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.