

# Making Transitions Work

## ANNUAL REPORT



**FISCAL YEAR 2018**

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**DRAFT**

# **Oakland Housing Authority**

## **Fiscal Year 2018 MTW Annual Report**

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# Oakland Housing Authority

## Fiscal Year 2018 MTW Annual Report

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## Section I. Introduction

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The Oakland Housing Authority (OHA), established in 1938 to assure the availability of quality housing for low-income persons, is pleased to release its Fiscal Year (FY) 2018 Moving to Work Annual Report. As one of 39 participants in the US Department of Housing and Urban Development's (HUD) Moving to Work (MTW) demonstration program, OHA has the opportunity to explore and test new and innovative methods of delivering housing and supportive services to low-income residents. As an MTW demonstration participant, OHA uses the flexibility of the program, which waives certain provisions of the Housing Act of 1937 and HUD's subsequent regulations, as an opportunity to design its services to address specific and local market conditions and the needs of our residents. OHA rebranded the program as "Making Transitions Work" to better describe the opportunities created for residents of all ages and stages in life, achieving goals of employment, education, housing stability and self-sufficiency while promoting and supporting strong communities and neighborhoods.

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

Per the Agreement, OHA must complete an MTW Annual Report highlighting specific information regarding the activities conducted during the fiscal year. OHA's MTW Annual Report provides HUD, OHA residents, and the public information on OHA programs and the MTW budget and an analysis of changes that occurred during the period between July 1, 2017 and June 30, 2018.

### **Overview of the Agency's Goals and Objectives for FY 2018**

Oakland continued to be in the top five most expensive real estate and rental markets in the country, causing low inventory for all renters, but impacting the low-income, disabled and other special needs populations especially hard. Bay Area prices ripple outward from San Francisco, and highly-paid tech workers competing for housing continues to drive prices up. Many neighborhoods in Oakland that were once considered affordable because of their higher crime rates and their older housing stock such as West Oakland and Fruitvale are now rapidly gentrifying, causing displacement of low- and moderate-income residents who have lived in these communities for decades. Oakland landlords have increased rents a jaw dropping 51.1 percent since 2010, and although the upticks slowed near the end of the fiscal year, low unemployment and sustained job growth are continuing to push rents higher. The number of Oakland's unsheltered residents and encampments has continued to skyrocket, with 69 percent

of Oakland's homeless population reporting as unsheltered in the City of Oakland Homeless Census and Survey for 2017. The results of this point-in-time survey also showed a 25% increase of homelessness in Oakland, and all but 2 percent surveyed said they would welcome housing if it was available. OHA has responded by increasing its partnerships with City departments, County agencies, and local expert providers to grow capacity to reach families under its local, non-traditional programs that assist hard to house populations.

OHA's utilization numbers continued to decline slightly in the Housing Choice Voucher (HCV) program as families experienced an extremely competitive leasing environment with non-voucher holders, but these declines have been offset by the OHA-designed landlord incentives and efforts to assist and coach voucher holders to compete with market rate renters. Neighboring jurisdictions went into HAP shortfall during the year, prompting them to stop absorbing port-out residents. Consequently, OHA used an MTW activity to restrict port requests to neighboring jurisdictions to stem the flow of residents seeking to move out of the OHA jurisdiction and take Oakland subsidy dollars with them. Maintaining low vacancy rates in the Public Housing portfolio and getting new PBV units leased were also priorities to help offset utilization decreases in the HCV program.

Embracing our commitment to achieve excellence in all areas of the agency, the Government Finance Officers Association of the US and Canada (GFOA) awarded OHA the Certificate of Achievement for Excellence in Financial Reporting. This is the fifth consecutive year that OHA received this recognition, which is the result of the meticulous financial accountability reflected in the Comprehensive Annual Financial Report and is the highest form of recognition in the area of governmental accounting and reporting. The Oakland Housing Authority Police Department (OHAPD) was granted accreditation through the Commission on Accreditation for Public Safety Communications. The three-year accreditation demonstrates that OHAPD continues to "seek to achieve, objectively verify, and maintain high quality in operations through periodic evaluations conducted by an independent, non-governmental body that has established standards." The CA Highway Patrol and the Alameda County Sheriff's Office are the only two other agencies in CA with nationally accredited communications centers. OHAPD Dispatchers handle hundreds of calls a day. While OHAPD is state accredited, it is also one of very few law enforcement entities that are nationally accredited by the Commission on Accreditation for Law Enforcement Agencies (CALEA).



## **Preserving and Enhancing our Housing Portfolio**

OHA continued to use MTW authority to preserve its portfolio by extensively rehabbing portfolios of Project-based voucher (PBV) and public housing units, including completing the architectural planning for a comprehensive rehabilitation of two large senior Public Housing sites in downtown Oakland. Additionally, OHA submitted disposition application #DDA0008342 to the Special Application Center on October 11, 2017, requesting approval to dispose of 253 units in three senior sites. The application was approved a few days after the close of OHA's fiscal year on July 5, 2018. This disposition was a necessary solution to preserve the units' affordability under the PBV program and resolve longstanding issues related to chronic funding decreases in the public housing program and the resulting impact of deferred maintenance over many decades. OHA intends to submit applications for tenant-protection vouchers in FY 2019 and FY 2020 for the sites that were approved in this application.



Additionally, two new KaBOOM! playgrounds at two large public housing sites were funded by Pixar-Disney and Blue Shield of California to create new youth-designed playgrounds at both sites. The build-in-a-day projects were built by OHA and partner volunteers and will provide a safe place to play for 762 families with children as part of healthy physical, social and cognitive development.



Figure 1: KaBOOM! playground build at Lockwood Gardens

## Preserving and expanding affordable housing opportunities

### *Affordable Housing Development*

OHA partnered with Related California and Acts Community Development Corporation to develop Acts Cyrene Apartments, a 59-unit multifamily housing complex located at 94<sup>th</sup> Avenue & International Boulevard. The 1.26 acre site now houses a 4-story slab-on-grade building with retail space, a community room, and social service space for the residents. The project reserved 14 of the units for homeless/formerly homeless households. Using MTW flexibility, OHA purchased the land and provided additional funds for the construction and permanent funding sources. The residential portion of the building will be managed by Related and Acts



Figure 2: Acts Cyrene Apartments

will manage about 3,500 square feet of commercial space fronting International Boulevard. The project is expected to spur revitalization along the active commercial corridor that will soon have a dedicated bus rapid transit lane, a \$200 million investment in transit to improve traffic congestion and access to public transportation in East Oakland. Since the opening of Acts Cyrene in the fall of 2017, it has already served as a beacon in the community. The project complied with the CAL Green requirements adopted by the City of Oakland, and received a Gold rating. Its prime location near Oakland International Airport and the Coliseum Complex,

makes it an attractive location to begin this neighborhood's community revitalization, transforming the area into one of greater opportunity while preserving affordability.

During the fiscal year, critical milestones also were achieved for the Brooklyn Basin project, including an important land deal to make way for the 465 affordable homes. Construction is underway on the first phases of the project, which will include up to 3,100 total residential units, 200,000 square feet of ground-floor commercial space, approximately 32 acres of parks and public open space, and two renovated marinas, representing \$1.5 billion in private investment capital. Separately, Empyrean Towers achieved notable accomplishments during FY 2018. The project will take a severely distressed, privately-owned SRO property and create 66 fully renovated affordable housing units in a historic building. This project will eradicate a source of blight and convert market rate units into permanent affordable housing for low- and very low-income households in a central, downtown location in close proximity to public transportation, medical facilities, educational and employment opportunities. OHA is partnering with Resources for Community Development (RCD) to convert the building to affordable housing, and the extensive renovation involves expanding the units to studios and one-bedroom apartments. The project assembled all required financing in FY 2018 in preparation for its anticipated construction start date in 2019. Through MTW, OHA authorized a predevelopment loan and committed 32 PBVs and an estimated \$1 million to acquire the land and \$4 million in permanent

gap financing for a total of \$5 million to develop the project. As a partner in the development of over 17 projects in Oakland, OHA continues to use these projects to facilitate Section 3 employment opportunities that connect trained residents with employment opportunities. These “brick and mortar” projects combined with MTW and Jobs Plus employment training and OHA’s education initiatives are working to increase opportunities for OHA’s families.

#### *Services-enriched Housing through Systems Alignment*

During FY 2018, OHA continued to pursue system alignment. “Systems Alignment” is a term for the need to align affordable housing policies and programs with those of other social service systems to improve lifetime outcomes in the areas of health, education, and employment. OHA’s new local, non-traditional programs under the Building Bridges (BB) umbrella launched during FY 2018. In an effort to connect the special needs populations served by the Alameda County Social Services Agency (SSA) with stable housing resources, OHA partnered with SSA to provide the housing assistance component for two pilot programs that serve foster youth/young adults participating in the THP+ program and CalWORKs families participating in the SSA’s short-term housing assistance program. BB THP+ is a short-term program designed to extend the runway of assistance and help create a pathway to economic stability for people aging out of the foster care system. OHA utilized the County of Alameda’s 2017 RFP as the competitive selection process to award housing assistance funding to First Place for Youth (FPY). The award of funding resulted in an executed contract between OHA and FPY to provide rental housing assistance for low-income THP+ participants for up to five years. Staff also began program design and outreach to prospective participants.

The BB CalWORKs program also commenced with SSA to serve families enrolled in SSA’s employment and cash benefit programs and are in need of stable housing. The current CalWORKs housing assistance program provides housing search assistance, security deposit assistance and rental subsidy assistance for up to 6 months. OHA will leverage these resources by providing a shallow housing subsidy for up to an additional two years for formerly homeless CalWORKs clients who are employable and actively engaged in a plan to achieve housing stability. SSA will provide wrap around case management services to address employment barriers and assist with access to other needed community resources. Based on funding availability, families who successfully complete the CalWORKs program and maintain their housing may be referred for eligibility screening for an HCV. The first 13 families in BB THP+ completed eligibility screenings and inspections during FY 2018.

OHA also expanded affordable housing to low-income Oaklanders through its BB SRO program. During FY 2018, OHA executed contracts with qualified owners, property managers, and developers in Oakland and provided operating subsidies for existing service-enriched, single-room occupancy (SRO) units, shared housing and transitional housing units set aside for veterans, foster youth, or other special needs populations. The contracts for the sites were awarded based on OHA’s competitive selection process conducted in 2017. A monthly average of 157 families was served during the fiscal year as the program ramped up to its maximum capacity of 289 families served.

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

OHA leverages MTW flexibility to enhance services provided both in-house and through subject matter expert partners to provide participants with services to support employment, education, health and wellness. OHA’s Promise Plus initiative is a multi-year program in partnership with the Oakland Unified School District to foster parent engagement, improve student attendance



and promote academic excellence. A former resident intern at OHA won the Housing Association Insurance (HAI) Group scholarship for the second year in a row as part of OHA's education initiative to support resident goals through higher education. Additionally, the Jobs Plus West Oakland initiative, in its third year, exceeded enrollment targets by employing resident Community Coaches and through creative recruitment strategies. Midway through the fiscal year, OHA moved more of the employment training in house to the Resident Leadership Center for job training and recruitments.



Figure 3: PACT Grand Opening with Mayor Schaaf

Parents and Children Together (PACT), a family reunification program that provides housing and supportive services to families conquering obstacles encountered during re-entry from jail, opened a new site at the end of 2017. The grand opening celebrated a larger and fully renovated site that included a new playground. Building resident capacity is critical to OHA's vision, and OHA used MTW flexibility to provide a significant level of support above and beyond housing assistance in order to enhance and sustain resident educational and employment outcomes.

## MTW Statutory Objectives

All MTW activities meet at least one or more of the following statutory goals:

1. Reduce costs and achieve greater cost effectiveness in Federal expenditures;
2. 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
3. Increase housing choices for low-income families

Information and data collected on the progress OHA made toward implementing 20 of the 27 approved activities are included in Section IV.

The FY 2018 MTW Annual Plan and Report are available on OHA's website at [www.oakha.org](http://www.oakha.org).

## Section II. General Housing Authority Operating Information

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### A. Housing Stock Information

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

#### Public Housing

The public housing program has 1,606 units across two OHA-managed sites and 14 third-party managed sites. Combined, the public housing portfolio maintained over 98% occupancy rate and staff aggressively pursued applicants on the waitlists to fill any open vacancies. OHA completed architectural plans for a major restoration of two public housing senior sites (Oak Grove North and South) and expects to start renovations in 2018.

OHA submitted disposition application #DDA0008342 to the Special Application Center on October 11, 2017, requesting approval to dispose of 253 units in three senior sites and replace the units with the equivalent number of project-based voucher units. The application was approved a few days after the close of FY 2018 on July 5, 2018. This disposition was a necessary solution to preserve the units and resolve longstanding issues related to chronic funding decreases in the public housing program, and the resulting impact of deferred maintenance over many decades. In an effort to prevent displacement, no in-place residents will be required to move as part of this disposition action.

#### Local, Non-traditional

OHA administered existing programs and launched new local programs during the FY. Existing programs such as the Sponsor Based Housing Assistance Program (SBHAP), launched in 2010, in partnership with the City and expert providers, offered housing assistance to chronically homeless from encampments, ex-offenders released from San Quentin prison, and emancipated foster youth exiting the juvenile justice system. This program has the capacity to serve up to a maximum of 125 households per month.

The **Parents and Children Together (PACT)** program has evolved from a program serving primarily mothers exiting the criminal justice system to include any parent exiting the Santa Rita County Jail system that is enrolled in a reentry program designed and facilitated by the Alameda County Sheriff's Office (ACSO). OHA accepted referrals from the ACSO and provided service-enriched housing to facilitate reuniting these parents with their children in stable and safe housing. The program expanded into a new site in 2017 and has a capacity to serve 18 families per month.

New local programs launched in FY 2018 include the Building Bridges initiative which uses partnerships with City, Alameda County and experienced community-based organizations to provide housing assistance to underserved populations. This program seeks to extend and leverage existing support through systems alignment to increase the chance of sustained success and long-term positive outcomes for these families. The **BB SRO** program has a capacity to serve 289 families through a service-enriched SRO, shared housing and transitional housing units set aside housing for veterans, homeless and foster youth. OHA provides a monthly operating subsidy for each occupied bedroom/apartment that is based on a formula

whereby OHA pays 75 percent of the rent and the eligible resident pays up to 25 percent of the rent.

The **BB CalWORKs** is designed to provide local housing assistance for 1-2 years for Alameda County Social Services Agency (ACSSA) clients who are actively engaged in a plan to achieve self-sufficiency. Specifically the program serves employable, formerly homeless CalWORKs clients with the goal of stabilizing the households and improving outcomes for families and children. OHA and Alameda County Social Services Agency (ACSSA) will develop a referral process, billing procedure and forms and reporting requirements. ACSSA will provide wrap around case management services to address employment barriers and assist with access to other needed community resources and upon successful program completion, program participants may be referred to eligibility screening for a Housing Choice Voucher. This program has the capacity to serve up to 50 families per month.

**BB THP+** is a short-term program designed to extend the runway of assistance and help create a pathway to economic stability for people exiting the foster care system. OHA utilized the County of Alameda's 2017 RFP as the competitive selection process to award housing assistance funding to First Place for Youth (FPY). The award of funding resulted in an executed contract between OHA and FPY to provide rental housing assistance for low-income THP+ participants for up to five years. The service provider will provide program participants through direct referral. This program has the capacity to serve up to 50 families per month.

## Housing Choice Voucher

The majority of OHA's housing assistance is delivered in the form of a tenant-based voucher. OHA has the capacity to serve 12,866 families through a HCV, with about 8,800 of those families served using a traditional tenant-based subsidy. Approximately 50 of the vouchers are reserved for the Family Unification Program, and OHA administers approximately 80 vouchers through the HCV homeownership program.

## Project-Based Vouchers

Overall, OHA dedicates approximately 37 percent of its HCV portfolio to project based voucher (PBV) units. In FY 2018, OHA issued PBV assistance through new HAP contracts (leases), a new AHAP contract for one new construction project and conditional awards through Board approval. In the FY 2018 Plan, OHA projected to issue PBV assistance to 568 units through these methods. However, as shown in Table 1, OHA issued 556 PBVs to new units through new contracts (HAP and AHAP contracts) and conditional board approvals. The difference between planned and actual can be attributed to three different conditions: 1) the number of leased vouchers was less for some smaller projects awarded through an RFQ process, 2) some projects were projected to be but leased remained in the "Committed" status, 3) unanticipated conditional PBV awards to development projects and projects were awarded funds through the City of Oakland's competitive process during the fiscal year.



Figure 4: Prosperity Place

In 2017, OHA awarded 636 PBVs through RFQ #16-008 across 20 projects and during FY 2018 OHA leased the first 105 of these units. The number of leased vouchers was lower for some projects due to some families not meeting the eligibility criteria for the PBV program or opting not to participate. In an effort to minimize displacement of existing families, fewer vouchers were leased than was planned as shown in Table 1. Additional projects that were conditionally awarded PBVs through the RFQ were planned to be leased in FY 2018, but remained in the “Committed” status as shown in Table 1, due to



Figure 5: Empyrean Towers

delays in completing the eligibility determinations as well as additional time required to conduct environmental assessments. Construction was completed on the Acts Cyrene development in the fall of 2017 and the site was fully leased up, utilizing all 14 PBVs anticipated in the FY 2018 Annual Plan, bringing the total new vouchers leased to 119 instead of the 544 planned. Overall, OHA had approximately 2,230 PBVs leased at the end of FY 2018 across the entire portfolio.

Conditional awards made through board approval far exceeded the planned benchmarks. In FY 2018, OHA planned to conditionally award an additional 10 vouchers to Civic Center TOD, an existing project, which did occur. OHA conditionally awarded an additional 427 PBVs to new construction projects, which were not anticipated. Two projects are being developed through MTW activity #08-01: Brooklyn Basin (258 units) and Empyrean Towers (32 units). Brooklyn Basin is a large scale, master planned community involving 3,100 residential units with 465 of units deemed affordable. The development of the affordable units is divided into 4 projects and will be phased in with Project 1 and 2 are targeted to close by end of the 2018 and Project 3 and 4 in 2019. Construction started on Project 1 during the FY. Separately, Empyrean Towers is a major rehabilitation of a severely distressed SRO property and will result in 66 new affordable studios and 1 bedroom units. Construction is slated to start in December 2018.

Employing MTW Activity #06-03, an additional three projects, approved through the City of Oakland competitive NOFA process, lead to a total conditional commitment of 137 PBVs. These projects are new construction and substantial rehab and are 3268 San Pablo (50 units), Fruitvale Transit Village Phase IIB (75 units) and Fruitvale Studios (12 units).

Camino 23 (26 units) is a new construction project that had vouchers previously awarded through conditional approval. The project completed preliminary approvals and an AHAP contract was executed during FY 2018, which was not anticipated. Overall OHA planned to lease or conditionally award 568 units and achieved 556 during FY 2018. While OHA missed its projected leasing targets for projects awarded through the RFQ process, it far exceeded the planned benchmarks for conditional awards.

The Oakland Affordable Housing Preservation Initiatives (OAHPI) portfolio consists of 1,539 total allocated PBVs in small sites scattered throughout Oakland. At the end of this FY, 533 families that were occupants during the 2010 disposition continued to reside there instead of opting to move with tenant-based assistance. A total of 780 units converted to PBV as of FY 2018. During the reporting period, 51 units were extensively rehabilitated to modernize and upgrade the facilities while also correcting issues related to deferred maintenance.

The number of PBVs leased is 2,233, and the number committed in OHA's portfolio as of the end of the FY is 3,566 (28% of the portfolio) and of this 3,338 had AHAP or HAP contracts as of the end of the FY. A list of all PBV sites is included in [Appendix B](#), which includes pending commitments totaling 4,802, or 37% of the MTW voucher allocation.

Table 1. New Project-Based Vouchers (Planned versus Actual)

Property Name	Number of Vouchers Newly Project Based		Status at End of Plan Year **	RAD?	Description of Project
	Planned *	Actual			
Rosa Park	11	5	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.
Hisman Hin-Nu Apartments	10	7	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.
Oak Park Apartments	10	3	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.
Seven Directions	10	5	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. An additional of 10 PBVs was awarded in 2017.
San Pablo Hotel	31	27	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.
Swan Market Apartments	10	4	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.
Ambassador Apartments	10	10	Leased/Issued	No	An affordable housing project of 69 units at 3610 Peralta Avenue in Oakland for low-income families. The project was leased up in 2017 with 10 PBV units.
Fox Court Apt.	13	13	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. An additional of 13 PBVs was awarded in 2017.
Stanley Avenue Lofts	13	4	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.
Adeline Street Lofts	20	8	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.
Madsion Apts (additional vouchers)	31	19	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. An additional of 31 PBVs are awarded in 2017.
ACTS/Cyrene	14	14	Leased/Issued	No	An affordable housing project of 59 units in East Oakland for low-income families. The project was leased up in 2017 with 14 PBV units.
Town Center at Acorn	50		Committed	No	ACORN, which is made up of two properties – Town Center and Courtyard at Acorn, was originally constructed in the 60s as part of the City's efforts to redevelop West Oakland, and had gone through extensive rehabilitation in late 90s by BRIDGE Housing. The project, being an integral part of the West Oakland redevelopment, is close to amenities and job centers. In addition, BRIDGE is offering on-site services programs targeting the current 225 residents who are under age 18, which include summer internships, recreation programs and computer learning at the site's computer learning center. Town Center at Acorn is Phase I & II of the redevelopment. Located at 1143 10th Street, Town Center at Acorn consists of 206 units serving low-income families. The 50 PBV subsidies will be attached to 4 studios, 10 one-bedrooms, 20 two-bedrooms, and 16 three-bedrooms.



Courtyards at Acorn	30		Committed	No	Courtyards at Acorn is Phase II of the Acorn redevelopment project. It is an 87-unit property located at 923 Adeline Street, serving low income families. The 30 PBV subsidies will be attached to 2 studios, 4 one-bedrooms, 12 two-bedrooms and 12 three-bedrooms.
Bishop Roy C. Nichols	17		Committed	No	The project, located at 1027 60th Street, is a 17-unit building, all one-bedroom units. It is a low-rise three-story building with an elevator, a community room and a laundry room built in 2003. The project is specifically set aside for low-income seniors aged 62 plus and with incomes at 45% AMI or less. The project owner, Christian Church Homes (CCH) has over 50 years of experience in developing and managing senior affordable housing. All 17 PBV subsidies will be attached to one-bedroom units.
Sylvester Rutledge Manor	64		Committed	No	The project, located at 3255 San Pablo Avenue, was built in 2002 for serving low-income seniors aged 55+. It is a low-rise development consisting of 64 one-bedroom units with full kitchens. All 64 PBV subsidies will be attached to one-bedroom units. The PBV subsidies will allow CCH to increase on-site supportive services for both Bishop Roy Nichols and Sylvester Rutledge Manor and lessen the rent burden for low-income seniors at both projects.
Drachma LP Apartments	11		Committed	No	The project is a scattered site property of 19 apartments in old Victorian homes in West Oakland that serves low-income families. It consists of 8 buildings of 2 single-family homes, 3 duplexes, 2 triplexes, and 1 5-unit building. The project is close to transit, schools and grocery stores and health facilities. The 11 PBV subsidies will be attached to 1 studio, 2 one-bedrooms, 7 two-bedrooms and 1 three-bedroom. Resident services are not available on-site but residents have access to RCD's resident services programs.
International Blvd. Apartments	18		Committed	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.
Northgate Apartments	14		Committed	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.
Oak Street Apartments	25		Committed	No	The project, located at 1109 Oak Street, serves low-income seniors aged 55+. It is a 5-story 39-unit affordable senior housing property with commercial spaces on the ground floor. It is designed as a mixed use project to foster a vibrant community and serves residents of the neighborhood. SAHA provides a part-time service coordinator who helps and advocates for senior residents in navigating the social services system. All 25 PBV subsidies will be attached to studio units.
Eastside Arts & Housing	10		Committed	No	Eastside Arts and Housing is a 16 unit affordable housing property located at 2283 International Boulevard in the San Antonio neighborhood of Oakland. The building was built in 1928 and rehabbed in 2006. The ground floor retail spaces house the Eastside Cultural Center. All of the units are filled with light, featuring amenities such as high ceilings, granite countertops, large windows, wood floors, and architectural details such as arched doorways. It is a secure building with intercom, and there is an onsite laundry room.

Kenneth Henry Court	15		Committed	No	Kenneth Henry Court is a 51 unit affordable housing property located at 6475 Foothill Boulevard in East Oakland. KHC has been providing permanent affordable housing to the area's residents for over twenty years. The development was in foreclosure due to the closing of Oakland Community Housing, Inc. SAHA acquired the property, performed necessary rehabilitation in 2013, and assumed operations in order to preserve the existing housing and maintain the property as an affordable development and long-term community asset. All of the units are spacious, featuring maple cabinets, and some are townhouse-style units. All of the units have washer and dryer hook-ups. Also, the property has a community room, computer room, laundry room, and playground. It also features a secure entrance with intercom, and a security camera system.
Westlake Christian Terrace West (WCTW)	121		Committed	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.
Civic Center TOD	10	10	Conditional Award	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. An additional 10 PBVs was awarded in 2018.
3268 San Pablo		50	Conditional Award	No	3268 San Pablo is a 51 unit new construction project serving seniors that earn between 20% and 60% of the Area Median Income (AMI). The project's unit mix is comprised of 13 studio units and 38 one-bedroom units (including one manager's unit). Of the 51 units, 13 units (25%) will be designated for extremely low-income household that are formerly homeless or at risk of homelessness and an additional 13 units (25%) will be designated for low-income veterans.
Fruitvale Transit Village Phase IIB		75	Conditional Award	No	The Fruitvale Transit Village Phase IIB is the third and final phase of of the Fruitvale Transit Village, a mixed-use transit oriented development. The project will be a 4 and 5 stories of Type III and Type V construction cover a concrete podium. There will be 180 units of affordable rental housing, a large exterior courtyard over the podium in addition to the interior common spaces. The ground floor will include a 7,200 SF space for a non-profit clinic. The project will be available to families making up to 60% of AMI, and 20% of the units will be set aside for seniors aged over 55 with chronic illness.
Fruitvale Studios		12	Conditional Award	No	The Fruitvale Studios is a substantial rehabilitation project of 24 studios apartment units located at 2600 International Blvd. The project will be a 100% permanent supportive housing community with resident supportive services available on-site available to all residents. Half the units will be set aside for individuals with special needs or who experiencing homelessness.
Brooklyn Basin		258	Conditional Award	No	The project is a large scale, master planned community along Oakland's waterfront. The project is to be developed in phases, two of the parcels acquired by the City of Oakland and OHA will be developed into 465 units of affordable housing. Four projects independently owned and financed projects were created on the two parcels. One of the projects - Project 2 - will be a senior project of 110 units. All projects are to 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 four projects in 2018.
Empyrean		32	Conditional Award	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. Subject to NEPA, the rehabilitation will begin in the Fall of 2017.
Camino 23		26	AHAP Executed	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.
	568	556	Planned/Actual Total Vouchers Newly Project-Based		
* Figures in the "Planned" colun should match the corresponding Annual MTW Plan					
Unanticipated awards of PBV assistance					
** Leased/Issued (HAP contracts), AHAP executed, Committed through previous Board awards, Conditionally awarded through Board approval					

## Actual New Project-Based Vouchers (New Table Format)

Table 1 (A) below illustrates tenant-based vouchers that OHA project-based for the first time during the Plan Year. These include only those in which an AHAP was in place by the end of the Plan Year.

Table 1 (A): Actual New Project-Based Vouchers					
Property Name	Number of Vouchers Newly Project Based		Status at End of Plan Year **	RAD?	Description of Project
	Planned *	Actual			
Rosa Park	11	5	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.
Hisman Hin-Nu Apartments	10	7	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.
Oak Park Apartments	10	3	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.
Seven Directions	10	5	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. An additional of 10 PBVs was awarded in 2017.
San Pablo Hotel	31	27	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.
Swan Market Apartments	10	4	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.
Ambassador Apartments	10	10	Leased/Issued	No	An affordable housing project of 69 units at 3610 Peralta Avenue in Oakland for low-income families. The project was leased up in 2017 with 10 PBV units.
Fox Court Apt.	13	13	Leased/Issued	No	An affordable housing project of 80 units in downtown Oakland for low-income /homless with HIV/AIDS families. The project was leased up in 2009 with 20 PBV units. An additional of 13 PBVs was awarded in 2017.
Stanley Avenue Lofts	13	4	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.
Adeline Street Lofts	20	8	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.
Madsion Apts (additional vouchers)	31	19	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. An additional of 31 PBVs are awarded in 2017.
Camino 23	26	26	Committed	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.
ACTS/Cyrene	14	14	Leased/Issued	No	An affordable housing project of 59 units in East Oakland for low-income families. The project was leased up in 2017 with 14 PBV units.
	209	145	Planned/Actual Total Vouchers Newly Project-Based		
* Figures in the planned column should match the corresponding Annual MTW Plan					
** Select "Status at the End of Plan Year" from : Committed, Leased/Issued					
Description of Differences between the Planned and Actual Number of Vouchers Newly Project-Based:					
The FY 2018 Annual MTW plan projected a total of 568 new project-based vouchers to be project based using the old report table format. Starting with the projected 568, subtract 375 units that were conditionally awarded through RFQ #16-008 in 2017, as OHA anticipated that these would be leased and they were not. Also, subtract Civic Center TOD which was projected to have a conditional award of 10 PBVs, which did occur but does not meet HUD's new definition for inclusion in this table. Lastly, Camino 23 was not anticipated to have an AHAP executed in FY 2018, but this did occur adding 26 new vouchers. (568-375-10+26 = 209). See Table 1 for more detail on planned versus actual projects. The difference in planned versus actual in this table is 64 units. This difference is solely due to leasing less units than projected for sites that were awarded through RFQ #16-008. Existing units may have been occupied by tenants that did not qualify under PBV guidelines or chose to not participate. OHA has chosen to not displace any tenants in these sites.					

## Existing Project-Based Vouchers

**Table 2: Actual Existing Project-Based Vouchers**

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

Property Name	Number of Vouchers Project-		Status at End of Plan Year**	RAD?	Description of Project
	Planned*	Actual			
Mandela Gateway	30	30	Leased/Issued	No	An affordable housing project of 187 units in West Oakland for low-income families. The project was leased up in 2004 with 30 PBV units.
Alteheim Senior Housing Phase I	23	23	Leased/Issued	No	The first phase of Altenheim Senior Housing project in Dimond district of Oakland with 93 units for low-income seniors. The project was leased up in 2007 with 23 PBV units.
Lion Creek Crossings II	18	18	Leased/Issued	No	The second phase of Lion Creek Crossings project with 146 units in East Oakland for low-income families. The project was leased up in 2007 with 18 PBV units.
Madison Apartments	19	19	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 Crossign III	16	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	18	18	Leased/Issued	No	An affordable housing project of 36 units in East Oakland for low-income families. The project was leased up in 2008 with 18 PBV units.
Orchards on Foothill	64	64	Leased/Issued	No	An affordable housing project of 65 units in Lower San Antonio district of Oakland for low-income seniors. The project was leased up in 2008 with 64 PBV units.
Fox Court Apt.	20	20	Leased/Issued	No	An affordable housing project of 80 units in downtown Oakland for low-income /homeless with HIV/AIDS families. The project was leased up in 2009 with 20 PBV units.
Jack London Gateway	60	60	Leased/Issued	No	An affordable housing project of 60 units in West Oakland for low-income seniors. The project was leased up in 2009 with 60 PBV units.
14th St at Central Station	20	20	Leased/Issued	No	An affordable housing project of 99 units in West Oakland for low-income families. The project was leased up in 2007 with 20 PBV units.
Tassafaronga Village Phase I	80	80	Leased/Issued	No	The first phase of Tassafaronga Village project with 137 units in East Oakland for low-income families. The project was leased up in 2010 with 80 PBV units.
Alteheim Senior Housing Phase II	40	40	Leased/Issued	No	The second and final phase of Altenheim Senior Housing project with 81 units for low-income seniors. This phase was leased up in 2010 with 40 PBV units.
Fairmount Apartments	16	16	Leased/Issued	No	An affordable housing project of 31 units in Grand Lake area of Oakland for low-income families and persons with disability. The project was leased up in 2010 with 16 PBV units.
Tassafaronga Village Phase II	19	19	Leased/Issued	No	The second and final phase of Tassafaronga project with 20 units for low-income/homeless with HIV/AIDS families. The project was leased up in 2010 with 19 PBV units.
Harp Plaza	19	18	Leased/Issued	No	An affordable housing project of 19 units in Eastmont district of Oakland for low-income families. The project was leased up in 2010.
Effie's House	10	7	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	14	11	Leased/Issued	No	A scattered-site affordable housing project of 14 units in West Oakland for low-income families. The project was leased up in 2010.
Foothill Family Partners	11	11	Leased/Issued	No	An affordable housing project of 65 units in Bancroft district of Oakland for low-income families. The project was leased up in 2011.
St. Joseph's Senior Apts	83	83	Leased/Issued	No	An affordable housing project of 84 units in Fruitvale district of Oakland for low-income seniors. The project was leased up in 2011 with 83 PBV units.
OHA Scattered Sites (OAHPI)	1,539	1,539	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	10	Leased/Issued	No	The 4th phase of Lion Creek Crossings project of 72 units in East Oakland for low-income families. The project was leased up in 2012 with 10 PBV units.
Savoy Phase 1	55	55	Leased/Issued	No	The first phase of the Savoy project of 101 units in downtown Oakland for individuals with special needs. The project was leased up in 2012.
Hugh Taylor House	35	32	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	50	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	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	16	Leased/Issued	No	An affordable housing project of 55 units in Eastlake district of Oakland for low-income/homeless with HIV/AIDS families. The project was leased up in 2012 with 16 PBV units.
Harrison Street Senior Housing	11	11	Leased/Issued	No	An affordable housing project of 73 units near downtown Oakland for low-income seniors. The project was leased up in 2012 with 11 PBV units.
Kenneth Henry Court	13	13	Leased/Issued	No	An affordable housing project of 51 units in the Bancroft district of Oakland for low-income families. The project was leased up in 2013.
California Hotel Phases 1 and 2	88	88	Leased/Issued	No	The first and second phase of California Hotel project of 137 units for families of low-income/special needs/homeless/HIV/AIDS. The phase was leased up in 2013 with 88 PBV units.
James Lee Court	12	12	Leased/Issued	No	An affordable housing project of 26 units for low-income families. The project was leased up in 2013.
Savoy Phase 2	46	46	Leased/Issued	No	The 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	11	Leased/Issued	No	An affordable housing project of 32 units in West Oakland for low-income families. The project was leased up in 2013 with 11 PBV units.
Oak Point Limited (OPLP)	15	15	Leased/Issued	No	A scattered-site affordable housing project of 31 units in West Oakland for low-income families. The project was leased up in 2013 with 15 PBV units.
Drasnin Manor	25	25	Leased/Issued	No	An affordable housing project of 26 units in East Oakland for low-income families. The project was leased up in 2013 with 25 PBV units.
St. Joseph's Family Apts	15	15	Leased/Issued	No	An affordable housing project of 62 units in Fruitvale district of Oakland for low-income families. The project was leased up in 2013 with 15 PBV units.



MacArthur Apts	14	14	Leased/Issued	No	An affordable housing project of 32 units in Lower Hills district of Oakland for low-income families. The project was leased up in 2013 with 14 PBV units.
California Hotel Phase 3	47	47	Leased/Issued	No	The third and final phase of California Hotel project of 137 units for low-income/special needs/homeless/HIV/AIDS families. This phase was leased up in 2013 with 47 PBV units.
Lion Creek Crossings V	127	127	Leased/Issued	No	The fifth phase of Lion Creek Crossings project of 128 units in East Oakland for low-income seniors. The project was leased up in 2014 with 127 PBV units.
Cathedral Gardens	43	43	Leased/Issued	No	An affordable housing project of 100 units in Uptown district of Oakland for low-income families. The project was leased up in 2014 with 43 PBV units.
Lakeside Senior Apartments	91	91	Leased/Issued	No	An affordable housing project of 92 units on the banks of Lake Merritt in Oakland for low-income seniors. The project was leased up in 2015 with 91 PBV units.
Marcus Garvey Commons	10	10	Leased/Issued	No	An affordable housing project of 22 units in West Oakland for low-income families. The project was leased up in 2015 with 10 PBV units.
1701 Martin Luther King Jr. Way	25	25	Leased/Issued	No	An affordable housing project of 26 units near downtown Oakland for low-income/special needs/homeless/HIV/AIDS families. The project was leased up in 2015 with 25 PBV units.
MURAL aka MacArthur Transit Village	22	22	Leased/Issued	No	An affordable housing project of 90 units in West Oakland for low-income families. The project was leased up in 2016 with 22 PBV units.
Ave Vista aka 460 Grand	34	34	Leased/Issued	No	An affordable housing project of 68 units in Lake Merritt area of Oakland for low-income families. The project was leased up in 2016 with 34 PBV units.
11th and Jackson (Prosperity Place)	35	35	Leased/Issued	No	An affordable housing project of 71 units in Chinatown Oakland for low-income families. The project was leased up in 2017 with 35 PBV units.
Civic Center TOD	10	10	Committed	No	An affordable housing project of 40 units in downtown Oakland for low-income/special needs/homeless families. An AHAP for 10 PBV was executed in 2016.
Redwood Hill Townhomes	27	27	Committed	No	An affordable housing project of 28 units in Laurel district of Oakland for low-income/special needs families. An AHAP for 11 PBV was executed in 2017.
3706 San Pablo Avenue	20	20	Committed	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.
Embarc Apartments	61	61	Committed	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.
Fruitvale Transit Village - Phase IIA	66	66	Committed	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.

3249

3193

Planned/Actual Total Existing Project-Based Vouchers

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

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

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

Some sites show differences because they have other existing subsidies where residents have below market rents and they can elect not to participate in the PBV program. Other sites have PBV contracts for all units, but some units have existing residents that do not qualify based on PBV program requirements. When these units are vacated they will be filled with new applicants from the site based waitlists.

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

As referenced above, OHA submitted a disposition application to the Special Application Center on October 11, 2017 requesting approval to dispose of 253 units in three senior sites. During FY 2018, OHA and HUD conducted discussions on the status of the application. This application is a necessary solution to preserve the units and resolve longstanding issues related to chronic funding decreases in public housing program, and the resulting impact of deferred maintenance over many decades. Soon after the close of the fiscal year, HUD approved the application opening the door for OHA to apply for tenant-protection vouchers for residents of the three sites. OHA plans to transfer control of the three properties via a minimum 30-year group lease to newly created partnerships, in which OHA controls the general partner, with the low-income housing affordability restrictions remaining in place for 55 years. OHA plans to rehabilitate these properties in two phases. Oak Grove North and South (Phase 1) and 1621 Harrison Street (Phase 2) will be separate phases, each funded through a LIHTC acquisition rehabilitation project. Applications for tenant protection vouchers (TPVs) will follow HUD guidelines as specified in PIH notice 2017-10 which states how soon OHA can apply for TPVs based on the timeline prompted by the site rehabilitation.

Additionally, OHA purchased the limited partner's interest in Foothill Family Apartments, L.P. which is a 65 unit affordable housing development consisting of a mix of public housing, project-based voucher and tax credit subsidized units.

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

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

### **Actual Other Changes to MTW Housing Stock in the Plan Year**

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Additionally, OHA purchased the limited partner's interest in Foothill Family Apartments, L.P. which is a 65 unit affordable housing development consisting of a mix of public housing, project-based voucher and tax credit subsidized units.

## **General Description of Actual Capital Expenditures During the Plan Year**

OHA included the Capital Fund Program (CFP) funds through its FY 2017 grant as part of its MTW Block Grant. In FY 2018, OHA expended approximately \$19.34 million of MTW funds on capital improvement projects at its public housing sites, OHA-managed project-based units and properties, administrative buildings, funding the development of new affordable housing, and purchasing vehicles, information technology, and equipment. As of the close of FY 2018, OHA had not accepted the 2018 CFP grant funds.

Public housing sites receiving capital expenditures included Lockwood Gardens, Peralta Village, Oak Grove North, and Oak Grove South. Architecture and engineering work continued in preparation for a major rehabilitation of Oak Grove North and Oak Grove South. Through a partnership with the KaBOOM organization, new playgrounds were installed at Lockwood Gardens and Peralta Village. While KaBOOM supplied and installed the playground equipment, OHA funded the site preparation work and play area surface material.

Full interior rehabilitations were completed in 51 PBV units. In addition, the renovation of 2425 94<sup>th</sup> Avenue, a six unit building that had been vacant for several years, was completed during FY 2018. Roof replacements or major repairs were completed at four properties in the OAHPI PBV portfolio. Extensive work was done to repair fire damage at 8021 Plymouth Street. A playground was installed at the PACT site, 5726-5730 Elizabeth Street. At 768 41<sup>st</sup> Street, repairs were started to address moisture intrusion, complete structural repairs, and rehab units affected by moisture damage. This project is continuing in FY 2019.

OHA funded the creation of new affordable housing properties. MTW funds were used to acquire land that will be the site of 465 units (PBV and tax credit subsidies) of affordable housing as part of the Brooklyn Basin master planned community. Predevelopment architecture, engineering, and environmental review work continued for 15<sup>th</sup> & Harrison, an OHA-owned parcel on which the Authority plans to develop affordable housing. Further development activities for this property however were put on hold due to excessively high construction costs in the area.

MTW funds were also invested in affordable housing rehabilitation projects. OHA provided long-term loan funding for the acquisition and rehab of Empyrean Towers, which will include 66 units. OHA purchased the limited partner interest in Foothill Family Apartments, a mixed-finance project, in anticipation of rehabilitating the property using the low-income housing tax credit program and other funding sources.

OHA invested in updating and improving its administrative buildings. Accessibility improvements were completed in the Board of Commissioners meeting room, and architecture and engineering work was completed for a renovation of the 1619 Harrison Street headquarters office space. At the Service Center, which houses the OHA Police Department, property management staff and Capital Improvement Department, the roof was replaced and the exterior was repainted. A fiber optic data line was extended to our East District Office.

Finally, MTW funds were expended to purchase capital equipment for improved administrative and property operations. OHA also purchased two vehicles in FY 2018. Information technology equipment, police radios and vehicle equipment, and office equipment also were purchased.

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

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

**General Description of All Actual Capital Expenditures During the Plan Year**

OHA included the Capital Fund Program (CFP) funds through its FY 2017 grant as part of its MTW Block Grant. In FY 2018, OHA expended approximately \$18.8 million of MTW funds on capital improvement projects at its Public Housing sites, Project Based units and properties, administrative buildings, funding the development of new affordable housing, and purchasing vehicles, information technology, and equipment. As of the close of FY 2018, OHA had not accepted the 2018 CFP grant funds.

Public Housing sites receiving capital expenditures included Lockwood Gardens, Peralta Village, Oak Grove North, and Oak Grove South. Architecture and engineering work continued in preparation for a major rehabilitation of Oak Grove North and Oak Grove South. Through a partnership with the KaBOOM organization, new playgrounds were installed at Lockwood Gardens and Peralta Village. While KaBOOM supplied and installed the playground equipment, OHA funded the site preparation work and play area surface material.

Full interior rehabilitations were completed in 51 PBV units. In addition, the renovation of 2425 94th Avenue, a six unit building that had been vacant for several years, was completed during FY 2018. Roof replacements or major repairs were completed at four properties in the PBV portfolio. Extensive work was done to repair fire damage at 8021 Plymouth Street. A playground was installed at the PACT site, 5726-5730 Elizabeth Street. At 768 41st Street, repairs were started to address moisture intrusion, complete structural repairs, and rehab units affected by moisture damage. This project is continuing in FY 2019.

OHA funded the creation of new affordable housing properties. MTW funds were used to acquire land that will be the site of 465 units (PBV and tax credit subsidies) of affordable housing as part of the Brooklyn Basin master planned community. Predevelopment architecture, engineering, and environmental review work continued for 15th & Harrison, an OHA-owned parcel where the Authority is planning to develop affordable housing. Further development activities for this property however were put on hold due to excessive construction costs the area is currently experiencing related to the large amount of high end market rate apartments currently under construction.

MTW funds were also invested in affordable housing rehabilitation projects. OHA provided long term loan funding for the acquisition and rehab of Empyrean Towers, which will include 66 units. OHA purchased the limited partner interest in Foothill Family Apartments, a mixed-finance project, in anticipation of rehabilitating the property using the low-income housing tax credit program and other funding sources.

OHA invested in updating and improving its administrative buildings. Accessibility improvements were completed in the Board of Commissioners meeting room. Architecture and engineering work was completed for a renovation of the 1619 Harrison Street headquarters office space. At the Service Center, which houses the OHA Police Department, property management staff and Capital Improvement Department, the roof was replaced and the exterior was repainted. A fiber optic data line was extended to our East District Office.

Finally, MTW funds were expended to purchase vehicles and other capital equipment. OHA purchased two vehicles in FY 2018. Information technology equipment, police radios and vehicle equipment, and office equipment were also purchased.

## **B. Leasing Information**

### **Actual Number of Households Served**

The Oakland rental market remains challenging for tenant-based voucher holders searching for apartments in the City. The nine county Bay Area has been slow to create new units to offset the rapid and sustained increase in demand over the last several years and nearly all of the current development projects in the City are for high end market rate units. The impact of the very competitive and expensive rental market continued to negatively influence utilization in the HCV program. Compounding the issue, in FY 2018, OHA saw a flight of 84 owners exiting the program and has lost 271 owners since January of 2015. Additionally, a direct result of the skyrocketing housing costs has been an increase in homelessness in Oakland, up 25 percent (Alameda County up 39 percent since 2015. (Source: EveryOne Counts! 2017) According to the point in time homeless count survey conducted every other year, over half of those living in shelters, cars, tents and under highways are in Oakland and the cost of housing was listed as the reason 57 percent became homeless. In response to the calamitous characteristics of the regional housing market, OHA implemented multiple strategies using local, nontraditional programs and PBV strategies discussed in [Section II.A.](#) to offset and minimize the impact of the utilization decline during the program year.

In light of the challenges posed by the market, OHA served approximately 93 percent of the number of families possible through all MTW programs. While the number of families served is lower than it has been in past years, OHA's work to secure housing units through the PBV and LNT program partnerships has helped stabilize the baseline from continued decline. The actual leasing outcomes and the number of families served by each program detailed below demonstrate OHA's focus on employing traditional tools as well as its commitment to developing new strategies to ensure achievement of the highest occupancy rates possible.

### **Public Housing**

Both OHA-managed public housing sites as well as those managed by third-party property management companies maintained exceptional leasing levels. Across the 16 sites OHA maintained a 98 percent occupancy rate. Eight units of the total 1,606 were approved by the local HUD office to be excluded from the dwelling unit status for an eligible reason. Therefore, of the total number of units available, the public housing program served an average of 1,562 families in them each month.

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

Participation in OHA local non-traditional programs (both tenant and property based) remained consistent for existing programs. The tenant-based programs saw increases through OHA's development efforts with 44 new low-income housing tax credit units being added this year due to the lease up of Acts Cyrene. The Local Housing Assistance Program (LHAP), a tenant-based program which allowed tenants to remain housed that would not meet PBV eligibility standards after disposition due to income restrictions, decreased to 18 families as one participant family elected to use the Tenant Protection Voucher to move. The Sponsor-based Housing Assistance Program (SBHAP), serving chronically homeless from encampments, ex-offenders released from San Quentin prison, and emancipated foster youth exiting the juvenile justice system, maintained relatively steady participation with low turnover rates, but non-profit



service providers reported struggles to find new landlords willing to participate in the program due to the volume of qualified, unsubsidized applicants and the rapidly increasing costs of the rental market.

As a result of increasing homelessness, OHA responded by creating local, non-traditional programs under the Building Bridges (BB) initiative which is designed to use systems alignment with expert partners including the City and county to provide service enriched housing for emancipated foster youth, CalWORKs participants, veterans and those without housing. Through the BBSRO program, OHA executed contracts with qualified owners, property managers, and developers in Oakland and provided operating subsidies for in-place service-enriched, single-room occupancy (SRO) units, shared housing and transitional housing units set aside for veterans, foster youth, or other special needs populations. The tenant-based component of BBSRO, served an average of 107 families and the difference in planned versus actual for tenant-based is due primarily to less families served in BBSRO than anticipated as the program was launched in FY 2018.

Property-based programs such as BBTHP+ contracts with First Place for Youth, a vendor awarded through an Alameda County Social Services (SSA) RFQ process, to provide housing assistance to foster youth participating in the SSA THP+ program who are aging out of foster care. Progress during the FY included executing a contract with First Place for Youth with terms for providing housing assistance and establishing the referral process. Through the Building Bridges-CalWORKs program, OHA partnered with the SSA to provide housing assistance to SSA CalWORKs clients, actively engaged in a plan to achieve self-sufficiency, specifically employable, and formerly homeless families. In FY 2018, OHA executed a contract with SSA to provide assistance over a five year term and OHA and SSA staff established monthly meetings. SSA has identified 13 families for referral and OHA is setting up the business system to receive information on these families. The site based family unification/re-entry program Parents And Children Together (PACT) expanded into a new larger location and participation increased as a result. PACT is an expanded OHA program that serves populations referred by the Alameda County Sheriff's Office (ACSO) from both the MOMs and DADS programs. Combined these property-based programs served more than planned due to new BBSRO families.



Note: OHA moved the Building Bridges SRO (shared and transitional) housing families served to the property-based category instead of tenant-based. Therefore, numbers reflected in Table 5 show that the number of property-based families served increased from what was anticipated in the FY 2018 plan.

### **Housing Choice Voucher**

During the reporting year, OHA worked diligently to increase voucher utilization using traditional strategies. OHA absorbed all port-in vouchers, and extended search times for voucher holders struggling to find units in the Housing Choice Voucher program. Neighboring counties stopped absorbing OHA ports and OHA used the portability restriction activity to limit ports to adjacent communities. All of these issues account for the differences in the planned 11,522 households versus actual households served of 10,970 in the MTW Housing Choice Vouchers Utilized.

OHA also successfully designed and implemented MTW innovations to boost voucher utilization. The owner incentive activity, designed to recruit new landlords and retain existing owners by providing enhanced services and recognition, showed substantial progress in FY 2018 with an average of 75 new landlords and 194 new units added in a 3-month period. Additional details of the outcomes of each incentive are discussed in [Section IV, Activity #17-01](#).

## Project-based Voucher

For the last several years OHA committed hard units through PBV awards and awarded 636 units over 20 developments. OHA awarded PBVs to sites approved through the City of Oakland Housing Development Financing Program NOFA process, and through OHA internal development efforts. In FY 2018, OHA served on average 2,230 families per month with PBV subsidies. Of those families, 119 were newly leased units with 105 families from the RFQ and 14 families through the lease up of Acts Cyrene. The number of PBVs leased was lower than expected, as in-place tenants in units awarded through the RFQ did not always qualify under PBV program guidelines or they opted not to participate and continue to live in the unit without subsidy. So as to avoid displacement, the units will become PBV after those families choose to move out.

During the FY, OHA continued to conditionally award project-based vouchers: 290 PBVs were awarded to OHA development projects, 137 PBVs were awarded through the City of Oakland NOFA process, and an additional 10 PBVs were awarded to an existing project, Civic Center TOD.

Table 5: Actual Number of Households Served				
Snapshot and unit month information on the number of households the MTW PHA actually served at the end of the Plan Year.				
Number of Households Served Through:	Number of Unit Months Occupied/Leased*		Number of Households Served**	
	Planned ^^	Actual	Planned ^^	Actual
MTW Public Housing Units Leased	18,660	18,744	1,555	1,562
MTW Housing Choice Vouchers Utilized	138,264	131,640	11,522	10,970
Local, Non-Traditional: Tenant-Based	12,168	10,219	1,014	130
Local, Non-Traditional: Property-Based	264	303	22	847
Local, Non-Traditional: Homeownership	0	0	0	0
Planned/Actual Totals	169,356	160,906	14,113	13,509
<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>^^ Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.</p> <p>Please describe any differences between the planned and actual households served:</p>				

The Oakland rental market remains challenging for tenant-based voucher holders searching for apartments in the City. The nine county Bay Area has been slow to create new units to offset the rapid and sustained increase in demand over the last several years and nearly all of the current development projects in the City are for high end market rate units. The impact of the very competitive and expensive rental market continued to negatively influence utilization in the HCV program. Compounding the issue, in FY 2018, OHA saw a flight of 84 owners exiting the program and has lost 271 owners since January of 2015. Additionally, a direct result of the skyrocketing housing costs has been an increase in homelessness in Oakland, up 25 percent (Alameda County up 39 percent since 2015. (Source: EveryOne Counts! 2017) According to the point in time homeless count survey conducted every other year, over half of those living in shelters, cars, tents and under highways are in Oakland and the cost of housing was listed as the reason 57 percent became homeless. In response to the calamitous characteristics of the regional housing market, OHA implemented multiple strategies using local, nontraditional programs and PBV strategies discussed in Section II.A. to offset and minimize the impact of the utilization decline during the program year.

In light of the challenges posed by the market, OHA served approximately 93 percent of the number of families possible through all MTW programs. While the number of families served is lower than it has been in past years, OHA's work to secure housing units through the PBV and LNT program partnerships has helped stabilize the baseline from continued decline. The actual leasing outcomes and the number of families served by each program detailed below demonstrate OHA's focus on employing traditional tools as well as its commitment to developing new strategies to ensure achievement of the highest occupancy rates possible.

#### Public Housing

Both OHA-managed public housing sites as well as those managed by third-party property management companies maintained exceptional leasing levels. Across the 16 sites OHA maintained a 98 percent occupancy rate. Eight units of the total 1,606 were approved by the local HUD office to be excluded from the dwelling unit status for an eligible reason. Therefore, of the total number of units available, the public housing program served an average of 1,562 families in them each month.

#### Local, Non-traditional

Participation in OHA local non-traditional programs (both tenant and property based) remained consistent for existing programs. The tenant-

based programs saw increases through OHA's development efforts with 44 new low-income housing tax credit units being added this year due to the lease up of Acts Cyrene. The Local Housing Assistance Program (LHAP), a tenant-based program which allowed tenants to remain housed that would not meet PBV eligibility standards after disposition due to income restrictions, decreased to 18 families as one participant family elected to use the Tenant Protection Voucher to move. The Sponsor-based Housing Assistance Program (SBHAP), serving chronically homeless from encampments, ex- offenders released from San Quentin prison, and emancipated foster youth exiting the juvenile justice system, maintained relatively steady participation with low turnover rates, but non-profit service providers reported struggles to find new landlords willing to participate in the program due to the volume of qualified, unsubsidized applicants and the rapidly increasing costs of the rental market.

As a result of increasing homelessness, OHA responded by creating local, non-traditional programs under the Building Bridges (BB) initiative which is designed to use systems alignment with expert partners including the City and county to provide service enriched housing for emancipated foster youth, CalWORKs participants, veterans and those without housing. Through the BBSRO program, OHA executed contracts with qualified owners, property managers, and developers in Oakland and provided operating subsidies for in-place service-enriched, single-room occupancy (SRO) units, shared housing and transitional housing units set aside for veterans, foster youth, or other special needs populations. The tenant-based component of BBSRO, served an average of 107 families and the difference in planned versus actual for tenant-based is due primarily to less families served in BBSRO than anticipated as the program was launched in FY 2018.

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#### Housing Choice Voucher

During the reporting year, OHA worked diligently to increase voucher utilization using traditional strategies. OHA absorbed all port-in vouchers, and extended search times for voucher holders struggling to find units in the Housing Choice Voucher program. Neighboring counties stopped absorbing OHA ports and OHA used the portability restriction activity to limit ports to adjacent communities. All of these issues account for the differences in the planned 11,522 households versus actual households served of 10,970 in the MTW Housing Choice Vouchers Utilized.

OHA also successfully designed and implemented MTW innovations to boost voucher utilization. The owner incentive activity, designed to recruit new landlords and retain existing owners by providing enhanced services and recognition, showed substantial progress in FY 2018 with an average of 75 new landlords and 194 new units added in a 3-month period. Additional details of the outcomes of each incentive are discussed in Section IV, Activity #17-01.

#### Project-based Voucher

For the last several years OHA committed hard units through PBV awards and awarded 636 units over 20 developments. OHA awarded PBVs to sites approved through the City of Oakland Housing Development Financing Program NOFA process, and through OHA internal development efforts. In FY 2018, OHA served on average 2,230 families per month with PBV subsidies. Of those families, 119 were newly leased units with 105 families from the RFQ and 14 families through the lease up of Acts Cyrene. The number of PBVs leased was lower than expected, as in-place tenants in units awarded through the RFQ did not always qualify under PBV program guidelines or they opted not to participate and continue to live in the unit without subsidy. So as to avoid displacement, the units will become PBV after those families choose to move out.

During the FY, OHA continued to conditionally award project-based vouchers: 290 PBVs were awarded to OHA development projects, 137 PBVs were awarded through the City of Oakland NOFA process, and an additional 10 PBVs were awarded to an existing project, Civic Center TOD.

Local, Non-Traditional Category	MTW Activity Name/Number	Number of Unit Months Occupied/Leased*		Number of Households to be Served*	
		Planned^^	Actual	Planned^^	Actual
Property-	Fund Affordable Housing Development Activities	1,812	528	151	44
Property-based	Fund Affordable Housing Development Activities (08-01) - Tax credit units in service in total through FY2017	7,596	7,596	633	633
Tenant-Based	Local Housing Assistance Program (10-06)	1,644	1,560	137	130
Property-	PBV Transitional Housing Programs (11-05)	180	303	15	63
Property-Based	SRO/Studio Apartment Preservation Program (11-03)	1,200	535	100	107
Planned/Actual Totals		12,432	10,522	1,036	977

\* The sum of the figures provided should match the totals provided for each Local, Non-Traditional category in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

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

Households Receiving Local, Non-Traditional Services Only	Average Number of Households Per Month	Total Number of Households in the Plan Year
Non-residents	16	196

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

The Family and Community Partnerships department (FCP) and our Police Department provide community building events and supportive services and events to further our Education and Employment Initiatives helping families achieve self-sufficiency and life goals. Both East and West Oakland administrative offices provide WiFi connected computer labs open to the public and residents to use for job searches, training and educational pursuits. Most events are open to all OHA residents from multiple program types and are often attended by the broader community. The nine week Summer Youth Program provided children in the immediate and surrounding community an opportunity to have a fun and safe summer as well as avoid the summer academic slide with education based activities. Summer lunch was provided to youth

aged 3 to 15 years. Community Food Pantry services were provided with local partners and is open to all community members, promoting healthy food choices to all.

## **Discussion of any Actual Issues/Solutions Related to Leasing**

### **MTW Public Housing**

With vacancy rates under 2%, public housing did not experience leasing challenges that required solutions. OHA remains committed to rightsizing families to appropriate sized units to continue to maximize efficient use of the housing stock and will use the Standardized Transfer Policy to facilitate moving families to appropriately sized units to maintain low vacancy rates. OHA will continue to explore RAD and other options that may be available to move these properties out of the public housing program and preserve these affordable units for future generations.

### **MTW Housing Choice Voucher**

As discussed [in Actual Number of Households Served](#), the Housing Choice Voucher program, OHA's largest program, experienced challenges maximizing utilization as applicants competed with unassisted renters for limited and expensive housing stock. Extended voucher search times and multiple application fees hampered applicants. As a solution, OHA offered rental assistance coaching and application preparation assistance through its Housing Navigator program to help applicants present more competitive applications.



Other strategies to minimize the negative impact of HCV leasing issues included launching landlord incentives, which included:

- offering sign on bonuses to recruit new owner participants, (75 new owners added)
- vacancy loss funds to offset delays in re-leasing existing HCV units, (62 owners participated)
- prequalifying inspections to expedite the lease up process, (508 inspections performed and 119 contracts executed) and
- owner appreciation efforts. (258 owners recognized)

OHA also proactively allocated PBV subsidies to projects approved through the City of Oakland NOFA process and RFQs that were issued in FY 2017, leasing up 119 new property-based subsidy units. Additional PBV allocations were conditionally approved for new development projects. A full description of OHA's activities to commit and lease PBVs is available in [Section II A – Housing Stock Information](#) and [Appendix B](#).

### **Local, Non-Traditional**

To better leverage existing funds and services through systems alignment with City and County agencies, and to start to address a 25% increase in Oakland's unsheltered population, OHA expanded local service-enriched special needs housing. OHA implemented a number of local



programs with wrap around services that serve Oakland families with special leasing challenges. These populations include those living in homeless encampments suffering from mental health issues, individuals exiting the criminal justice system and emancipated foster youth. While OHA partners with experts to provide support and services to these households, typical leasing challenges still burden this “hard to house” client base, and OHA with its partners continue to work diligently to support the families to the point of sustained housing stability.

Table 6: Discussion of Any Actual Issues/Solutions Related to Leasing	
Discussion of any actual issues and solutions utilized in the MTW housing program listed.	
Housing Program	Description of Actual Leasing Issues and Solutions
MTW Public Housing	With vacancy rates under 2%, public housing did not experience leasing challenges that required solutions. OHA remains committed to rightsizing families to appropriate sized units to continue to maximize efficient use of the housing stock and will use the Standardized Transfer Policy to facilitate moving families to appropriately sized units to maintain low vacancy rates. OHA will continue to explore RAD and other options that may be available to move these properties out of the public housing program and preserve these affordable units for future generations.
MTW Housing Choice Voucher	<p>As discussed in Actual Number of Households Served, the Housing Choice Voucher program, OHA's largest program, experienced challenges maximizing utilization as applicants competed with unassisted renters for limited and expensive housing stock. Extended voucher search times and multiple application fees hampered applicants. As a solution, OHA offered rental assistance coaching and application preparation assistance through its Housing Navigator program to help applicants present more competitive applications.</p> <p>Other strategies to minimize the negative impact of HCV leasing issues included launching landlord incentives, which included:</p> <ul style="list-style-type: none"> <li>• offering sign on bonuses to recruit new owner participants, (75 new owners added)</li> <li>• vacancy loss funds to offset delays in re-leasing existing HCV units, (62 owners participated)</li> <li>• prequalifying inspections to expedite the lease up process, (508 inspections performed and 119 contracts executed) and</li> <li>• owner appreciation efforts. (258 owners recognized)</li> </ul> <p>OHA also proactively allocated PBV subsidies to projects approved through the City of Oakland NOFA process and RFQs that were issued in FY 2017, leasing up 119 new property-based subsidy units. Additional PBV allocations were conditionally approved for new development projects. A full description of OHA's activities to commit and lease PBVs is available in Section II A– Housing Stock Information and Appendix B.</p>
Local, Non-Traditional	To better leverage existing funds and services through systems alignment with City and County agencies, and to start to address a 25% increase in Oakland's unsheltered population, OHA expanded local service-enriched special needs housing. OHA implemented a number of local programs with wrap around services that serve Oakland families with special leasing challenges. These populations include those living in homeless encampments suffering from mental health issues, individuals exiting the criminal justice system and emancipated foster youth. While OHA partners with experts to provide support and services to these households, typical leasing challenges still burden this “hard to house” client base, and OHA with its partners continue to work diligently to support the families to the point of sustained housing stability.

## C. Waiting List Information

Table 7: Actual Waiting List Information

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

Waiting List Name	Description	Number of Households on Waiting List	Waiting List Open, Partially Open, or Closed	Was the Waiting List Opened During the Plan Year
Housing Choice Voucher: Tenant-Based	Community Wide	3,500	Closed	No
Housing Choice Voucher: Project-Based - OHA Managed	Site-Based	3,200	Closed	No
Housing Choice Voucher: Project-Based - Third Party Managed	Site-Based (Third Party Managed)	36,554	Yes	Yes
Public Housing- OHA Managed	Site-Based (OHA Managed)	250	Closed	No
Public Housing - Third Party Managed	Site-Based (Third Party Managed)	3,147	Yes	Yes
Local Non-Traditional - PACT	Direct Referral - from Program partners - The Alameda County Sheriff's Office (ACSO) provides MOMS and DADS applicants to OHA. Following ACSO program standards, ACSO staff select and refer to OHA those ACSO MOMS and DADS candidates who qualify for minimally supervised transitional housing after completion of a 6-8 week multi-faceted program while in custody including an Individual Case Management Plan (ICM). ACSO referred "applicants" are then screened by OHA Eligibility according to HUD program requirements. ACSO MOMS and DADS applicants who meet HUD program requirements are offered a unit at the OHA PACT Housing program site. Those selected for the OHA Housing Component remain in the ACSO Transitional Case Management Program for 18 months, during which they must comply with the PBV Housing Lease, PBV Program and ACSO Program requirements as well as their ICM.	5	Open	Yes
Local Non-Traditional - SBHAP	Direct Referral - The City of Oakland manages subcontractors who specialize in managing the program to serve three vulnerable populations: individuals living in street homeless encampments, adults being discharged from San Quentin State Prison, and youth with recent contact with the criminal justice system. These subcontractors provide program applicants via direct referral into the program managed by the City of Oakland.	N/A	No	No
Local Non-Traditional - Building Bridges - SRO	Direct Referral - OHA contracts with various service providers to provide service enriched housing to special needs populations, emancipated foster youth and veterans through it Building Bridges - SRO local non-traditional program. The applicants are submitted by direct referral and OHA performs eligibility screening.	N/A	No	No

Please describe any duplication of applicants across waiting lists:

Applicants have the opportunity to apply to multiple rental assistance programs and often appear on multiple wait lists.

## Actual Changes to Waiting List in the Plan Year

Table 8: Actual Changes to the Waiting List in the Plan Year	
Please describe any actual changes to the organizational structure or policies of the waiting lists(s), including any opening or closing of a waiting list, during the Plan Year.	
Waiting List Name	Description of Actual Changes to Waiting List
Housing Choice Voucher: Tenant-Based	None
Housing Choice Voucher: Project-Based - OHA Managed	None
Housing Choice Voucher: Project-Based- Third Party Managed	Lion Creek Crossings phase 1 were open for all bedroom sizes. Marcus Garvy Commons open for 1, 2, 3, 4 bedroom sizes. Prosperity Place open for 1,2,3 bedroom sizes. Effie's House was opened for 1 bedrooms. CA Hotel was open for studios, 1, and 2 bedrooms. Seven Directions was open for 2 and 3 bedrooms. Rosa Park is open on an ongoing basis for studios, 1, and 2 bedroom sizes. Tassafaronga phase 2 has an ongoing open waitlist for 4 bedroom size units.
Public Housing - OHA Managed	None
Public Housing- Third Party Managed	Yes - Waitlists were open for all bedroom sized for Lion Creek Crossing phases 1-4.
Local Non-Traditional	Open for graduates of ASCO MOMs and DADs programs

## D. Information on Statutory Objectives and Requirements

### 75% of Families Assisted Are Very Low-Income

Approximately, 95 percent of the families in OHA's traditional programs were very low-income, which exceeds the statutory requirement by 20 percent. About 86 percent of the families' served in local, non-traditional programs incomes fall below the very low-income threshold, which amounts to approximately \$52,150 annually for a family of four. Table 10 shows the breakdown of the families in local, non-traditional programs and the corresponding Area Median Income (AMI) range.

Table 9: 75% of Families Assisted are Very Low Income	
HUD will verify compliance with the statutory requirement that at least 75% of the households assisted by the MTW PHA are very low income for MTW public housing units and MTW HCVs through HUD systems. The MTW PHA should provide data for the actual families housed upon admission during the PHA's Plan Year reported in the "Local, Non-Traditional: Tenant-based"; "Local, Non-Traditional: Property Based"; and "Local, Non-Traditional: Homeownership" categories. Do not include households reported in the "Local, Non-Traditional Services Only" category.	
Income Level	Number of Local, Non-Traditional Households Admitted in the Plan Year
80%-50% Area Median Income	136
49%-30% Area Median Income	261
Below 30% Area Median Income	580
<b>Total Local, Non-Traditional Households Admitted</b>	<b>977</b>

## Maintain Comparable Mix

As reported since FY 2010, the majority of the households on the public housing and HCV waitlists are one-person households. This demographic differs greatly from the percentage of

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

**Table 10: Maintain Comparable Mix**

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served by the MTW PHA prior to entry into the MTW demonstration (or the closest date with available data) and compare that to the current mix of family sizes served during the Plan Year.

Baseline Mix of Family Sizes Served (upon entry to MTW)					
Family Size	Occupied Public Housing Units	Utilized HCVs	Non-MTW Adjustments*	Baseline Mix Number	Baseline Mix Percentage
1 Person	705	3,158	0	3,863	30%
2 Person	745	2,853	0	3,598	28%
3 Person	596	1,877	0	2,473	19%
4 Person	344	1,318	0	1,662	13%
5 Person	169	588	0	757	6%
6+ Person	76	324	0	400	3%
<b>Total</b>	<b>2,635</b>	<b>10,118</b>	<b>0</b>	<b>12,753</b>	<b>100%</b>

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

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

N/A

Mix of Family Sizes Served (in Plan Year)					
Family Size	Baseline Mix Number	Baseline Mix Percentage**	Number of Households Served in Plan	Percentage of Households Served in Plan	Percentage Change from Baseline Year to
1 Person	3,863	30%	5,424	40%	10%
2 Person	3,598	28%	3,728	27%	-1%
3 Person	2,473	19%	1,919	14%	-5%
4 Person	1,662	13%	1,496	11%	-2%
5 Person	757	6%	658	5%	-1%
6+ Person	400	3%	389	3%	0%
<b>Total</b>	<b>12,753</b>	<b>100%</b>	<b>13,614</b>	<b>100%</b>	<b>0%</b>

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

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

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

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

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

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

OHA implemented three activities that assisted households in achieving self-sufficiency goals. A total of 47 households met the requirements for self-sufficiency as defined for each respective activity. OHA continued to explore the definition of self-sufficiency for activities that were not yet implemented or on hold, in order to establish clarity and consistency around the self-sufficiency goals for participant families.

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

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

MTW Activity Name/Number	Number of Households Transitioned to Self Sufficiency*	MTW PHA Local Definition of Self Sufficiency
PBV Transitional Housing Programs / 11-05	4	Number of PACT participants that move from the site with the notice of graduation
Alternative Recertification Schedules / 14-01	OHA plans to upgrade the business system in early FY2019 and anticipates being able to report on this metric with the FY2019 report	Number of families that remain on a triennial or biennial recertification schedule throughout the fiscal year.
Program Extension for Households Receiving \$0 HAP / 10-02	36	Successful Exit during and after the 24 months
PBV Transitional Housing Programs / 11-05 - Building Bridges SRO, Shared and Transitional	7	Number of Households who maintain housing for at least 6 months
Households duplicated across activities/definitions	N/A	
47		Total Households Transitioned to Self Sufficiency

\* Figures should match the outcome reported where matrix SS#8 is used in Section IV of this annual MTW Report.

### **Section III. Proposed MTW Activities: HUD approval requested**

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All proposed activities that are granted approval by HUD are reported on in Section IV as “Approved Activities.” OHA did not propose any new activities in FY 2018.



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

Table 12 Approved MTW Activities: HUD Approval Previously Granted					
Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
17-01	2017	Owner Incentives Program	Program to provide support and benefits to existing owners and incentives for owners to join the HCV program	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, Section D.1.d., D.5, B.1, D.1.a, B.1, and Single Fund Flexibility. Attachment D, Section D and Use of Funds
17-02	2017	Automatic Rent Increase	Offer owners an automatic rent increase on the HAP contract anniversary date	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, D.2.b&c
15-02	2016	Modified Utility Allowance Policy	Modifies utility allowance policy to be consistent with FFY 2014 federal appropriations requirements that the household's utility allowance is consistent with the minimum subsidy or occupancy standard and eliminates the utility allowance payment.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.11, D.2.a
15-01	2016	Local Area Portability Reform	Revises portability policies in the Housing Choice Voucher program to limit port-outs to local area jurisdictions except for special circumstances.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.g

14-01	2016	Alternative Recertification Schedules	Changes reexamination of income for elderly and disabled households on fixed incomes to every three years and every two years for wage earning households. Households with fixed income from Social Security will receive automatic adjustments to their rent in interim years based on published cost of living adjustments (COLA) to the subsidy program.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
13-01	2016	Rent Reform Pilot Program	Creates a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where: <ul style="list-style-type: none"> <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> <li>• Recent increases in income excluded in recertification</li> <li>• Absolute minimum rent of \$25</li> </ul>	-Reduce costs and achieve greater cost effectiveness  -Provide incentives for families with children to become economically self-sufficient	Attachment C, Section C.4, C.11 Section D.1.c Section D.2.a
12-01	2012	Eliminate Caps and Time Limits on PBV Allocations	Eliminates the cap on the total number of units the Authority can project-base the number of units that can be project-based in a development and the Time Limit to add additional PBV units to an existing HAP contract.	Increase housing choices	Attachment C, Section D.1.e, Section B.3, Section D.7.
11-01	2011	PBV Occupancy Standards	Modifies the occupancy standards in the PBV program to be consistent with occupancy standards required by other state or locally administered funding in a development (e.g. LIHTC program)	Increase housing choices	Attachment C, Section D.7
11-02	NYI	Standardized Transfer Policy	Creates standard transfer policies in the public housing, Section 8, and project-based assistance programs to increase housing choices for residents.	Increase housing choices	Attachment D, Use of Funds
11-03	NYI	SRO/ Studio Apartment Project-based Preservation Program	Develops a PBV sub-program tailored to the needs of developments with SRO and studio units providing service enriched housing. OHA will commit long-term PBV subsidies to developments where there is a need to preserve the housing resource.	Increase housing choices	Attachment C, Section D.7
11-05	2011	PBV Transitional Housing Programs	Modifies PBV program rules to permit transitional service enriched housing to fill specific unmet community needs. Used to operate the PACT Program, which provides transitional service enriched housing to mothers returning from prison to reunite	Increase housing choices	Attachment C, Section B.1, B.4, D.1.a,b,C.D.4 Attachment D, Section B.2

			with their children.		
10-01	2010	Specialized Housing Programs	Increases allocation of resources to the PACT program to improve outcomes and enhance program coordination. PACT program is operated in partnership with the Alameda County Sheriff's Department.	Provide incentives for families with children to become economically self-sufficient	Attachment D, Use of Funds
10-02	2010	Program Extension for Households Receiving \$0 HAP	Extends the period of time that a household can remain in the Section 8 program while receiving zero HAP assistance from 6 months to 24 months.	Provide incentives for families with children to become economically self-sufficient	Attachment C, Section D.1.b, D.3.a
10-03	2010	Combined PBV HAP Contract for Multiple Non-contiguous Sites	Allows a single PBV HAP contract to be executed for non-contiguous scattered site buildings organized by AMP or other logical grouping.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.a, D.7
10-04	2010	Alternative Initial Rent Determination for PBV Units	Allows for the use of a comparability analysis or market study certified by an independent agency approved in determining rent reasonableness to establish the initial PBV contract rent.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.2, D.7
10-05	2010	Acceptance of Lower HAP in PBV Units	In situations where a family becomes over housed as a result of conflicting occupancy policies in the conversion from Public Housing to Section 8, this activity allows the landlord or management agent to accept a lower HAP based on the appropriate number of bedrooms for the family and in order to keep the family in-place.	Increase housing choices	Attachment C, Section D.7
10-06	2010	Local Housing Assistance Program	Develops a Local Housing Assistance Program (LHAP) to assist households that otherwise might not qualify for or be successful in the traditional Public Housing and/or Section 8 programs. LHAP is provided directly to eligible families and to partnering agencies providing service enriched housing to special needs populations.	Increase housing choices	Attachment D, Use of Funds (SBHAP program), Attachment C, D.1.f, D.1.a and D.3.a (LHAP Programs), C.D.4
10-07	2010	Disposition Relocation and Counseling Services	Provides counseling and relocation assistance to impacted public housing residents in developments approved for disposition.	-Provide incentives for families with children to become more economically self-sufficient -Increase housing choices	Attachment D, Use of Funds
10-08	2011	Redesign FSS Program	Redesigns the FSS Program to incorporate best practices in the industry and encourage partnerships with community based programs and initiatives.	Provide incentives for families with children to become economically self-sufficient	Attachment C, Section E

10-09	2010	Waive 12 Month Minimum Stay Requirement in Converted PBV Units	Waives the 12 month minimum stay requirement for existing tenants in units that have converted to PBV assistance as the result of an approved disposition.	Increase housing choices	Attachment C, Section D.7
09-01	2011	Alternative HQS System	Uses a risk-based strategy to allocate HQS inspection resources in order to improve compliance at problem properties and allocate fewer resources to properties with a history of compliance.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.5 Attachment D, Section D
09-02	2010	Short-Term Subsidy Program	Provides temporary housing assistance to preserve existing affordable housing resources and allow tenants to remain in-place.	Reduce costs and achieve greater cost effectiveness	Attachment D, Use of Funds
08-01	2008	Fund Affordable Housing Development Activities	Utilizes single-fund budget flexibility to leverage funds to preserve affordable housing resources and create new affordable housing opportunities in Oakland.	Increase housing choices	Attachment D, Use of Funds
07-01 (moved to 14-01)	2010	Triennial Income Recertification	Changes reexamination of income for elderly and disabled households on fixed incomes to every three years. Eligible households receive automatic adjustments to rent in interim years based on published cost of living adjustments (COLA) to the subsidy program (i.e. SS, SSI, etc.)	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
06-01	2006	Site Based Wait Lists	Establishes site based wait lists in all public housing sites, HOPE IV sites, and developments with PBV allocations.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.1
06-02	2006	Allocation of PBV Units: Without Competitive Process	Allows for the allocation of PBV subsidy to developments owned directly or indirectly, through an affiliated partner, by OHA without using a competitive process.	-Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.a
06-03	2006	Allocation of PBV Units: Using Existing Competitive Process	Allows for the allocation of PBV subsidy to qualifying developments using the City of Oakland NOFA/RFP or other existing competitive process.	-Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.b

## A. Implemented Activities

OHA is currently implementing the following activities:

Table 13 Implemented Activities					
Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
17-01	2017	Owner Incentives Program	Program to provide support and benefits to existing owners and incentives for owners to join the HCV program	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, Section D.1.d,D.5, B.1, D.1.a, B.1, and Single Fund Flexibility. Attachment D, Section D and Use of Funds
17-02	2017	Automatic Rent Increase	Offer owners an automatic rent increase on the HAP contract anniversary date	Expanding housing choice and reduce costs to achieve greater cost effectiveness	Attachment C, D.2.b&c
15-02	2016	Modified Utility Allowance Policy	Modifies utility allowance policy to be consistent with FFY 2014 federal appropriations requirements that the household's utility allowance is consistent with the minimum subsidy or occupancy standard and eliminates the utility allowance payment.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.11, D.2.a
15-01	2016	Local Area Portability Reform	Revises portability policies in the Housing Choice Voucher program to limit port-outs to local area jurisdictions except for special circumstances.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.g
14-01	2016	Alternative Recertification Schedules	Changes reexamination of income for elderly and disabled households on fixed incomes to every three years and every two years for wage earning households. Households with fixed income from Social Security will receive automatic adjustments to their rent in interim years based on published cost of living adjustments (COLA) to the subsidy program.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
12-01	2012	Eliminate Caps and Time Limits on PBV Allocations	Eliminates the cap on the total number of units the Authority can project-base the number of units that can be project-based in a development and the time limit to add additional PBV units to existing HAP contracts.	Increase housing choices	Attachment C, Section D.1.e, Section B.3, Section D.7
11-01	2011	PBV Occupancy Standards	Modifies the occupancy standards in the PBV program to be consistent with occupancy standards required by other state or locally administered funding in a development (e.g. LIHTC program)	Increase housing choices	Attachment C, Section D.7

11-02	NYI	Standardized Transfer Policy	Creates standard transfer policies in the public housing, Section 8, and project-based assistance programs to increase housing choices for residents.	Increase housing choices	Attachment D, Use of Funds
11-03	2017	SRO/ Studio Apartment Preservation Program	Develops a sub-program tailored to the needs of developments with SRO and studio units. OHA will commit long-term subsidies to developments where there is a need to preserve the housing resource.	Increase housing choices	Attachment C, Section D.7
11-05	2011	PBV Transitional Housing Programs	Modifies PBV program rules to permit transitional service enriched housing to fill specific unmet community needs. Used to operate the PACT Program, which provides transitional service enriched housing to mothers returning from prison to reunite with their children.	Increase housing choices	Attachment C, Section B.1, B.4, D.1.a,b, C.D.4 Attachment D, Section B.2
10-01	2010	Specialized Housing Programs	Increases allocation of resources to the PACT program to improve outcomes and enhance program coordination. PACT program is operated in partnership with the Alameda County Sheriff's Department.	Provide incentives for families with children to become economically self-sufficient	Attachment D, Use of Funds
10-02	2010	Program Extension for Households Receiving \$0 HAP	Extends the period of time that a household can remain in the Section 8 program while receiving zero HAP assistance from 6 months to 24 months.	Provide incentives for families with children to become economically self-sufficient	Attachment C, Section D.1.b, D.3.a
10-03	2010	Combined PBV HAP Contract for Multiple Non-contiguous Sites	Allows a single PBV HAP contract to be executed for non-contiguous scattered site buildings organized by AMP or other logical grouping.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.a, D.7
10-04	2010	Alternative Initial Rent Determination for PBV Units	Allows for the use of a comparability analysis or market study certified by an independent agency approved in determining rent reasonableness to establish the initial PBV contract rent.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.2, D.7
10-05	2010	Acceptance of Lower HAP in PBV Units	In situations where a family becomes over housed as a result of conflicting occupancy policies in the conversion from Public Housing to Section 8, this activity allows the landlord or management agent to accept a lower HAP based on the appropriate number of bedrooms for the family and in order to keep the family in-place.	Increase housing choices	Attachment C, Section D.7
10-06	2010	Local Housing Assistance Program	Develops a Local Housing Assistance Program (LHAP) to assist households that otherwise might not qualify for or be successful in the traditional Public Housing and/or Section 8 programs. LHAP is provided directly to eligible families and to partnering agencies providing service enriched housing to special needs populations.	Increase housing choices	Attachment C, Section D.1.f, D.1.a and D.3.a and C.D.4 (LHAP Programs), Attachment D, Use of Funds (SBHAP Program)



08-01	2008	Fund Affordable Housing Development Activities	Utilize single-fund budget flexibility to leverage funds to preserve affordable housing resources and create new affordable housing opportunities in Oakland.	Increase housing choices	Attachment D, Use of Funds
06-01	2006	Site Based Wait Lists	Establishes site based wait lists in all public housing sites, HOPE IV sites, and developments with PBV allocations.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.1
06-02	2006	Allocation of PBV Units: Without Competitive Process	Allows for the allocation of PBV subsidy to developments owned directly or indirectly, through an affiliated partner, by OHA without using a competitive process.	-Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.a
06-03	2006	Allocation of PBV Units: Using Existing Competitive Process	Allows for the allocation of PBV subsidy to qualifying developments using the City of Oakland NOFA/RFP or other existing competitive process.	Reduce costs and achieve greater cost effectiveness -Increase housing choices	Attachment C, Section D.7.b

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

*Description of MTW Activity:* The Housing Choice Voucher program has been impacted by a dramatically escalating rental market and very limited inventory which has led to much longer search times and multiple voucher extensions being granted for families searching for housing. According to Zillow, over the last year, market rents increased by 21.6% in Oakland. In 2015, OHA saw many owners choose to leave the program or remove units by not releasing, resulting in the loss of approximately 824 units of affordable housing. In response to these market conditions, OHA is proposing the Owner Incentives Program activity to support existing and recruit new owners to the program to offset the exodus.

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

- Vacancy loss payments of up to two months-- HAP will be offered to existing HCV owners if they re-rent a unit previously occupied by an HCV tenant to another HCV participant within two months of contract cancellation. The average vacancy duration is currently about 2 weeks. Based on average HAP amounts, total average annual costs for OHA to implement vacancy loss payments will range from \$208,280 to \$832,300 for vacancy periods of 15 days to 60 days.
- Pre-qualifying unit inspections will be offered to all HCV program owners to expedite the lease up process and minimize delays or losses due to inspections. Inspections will not be linked to a participant and allow owners up to 60 days to find a tenant once an inspection has been passed. No additional costs are anticipated.
- 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.

- **New Landlord Incentive Payment** – Provides new owner participants a one-time payment of \$500 upon execution of a new HAP contract, and meet other defined eligibility criteria. OHA had 130 new landlords sign up for the program in 2015 and we project a 10% increase due to this incentive, totaling 143 new landlords. Projected costs are \$71,500.
- **Capital Improvement Payment** – Offer landlords that have failed a second inspection and are entering abatement a payment of up to \$2,500 to address capital improvement issues related to the reason for the HQS inspection failure. Landlords will apply for the payment and furnish documentation on the estimated repair costs for the improvement. Payments will be repaid to OHA via reduced HAP payments made to the owner over a 6 month period. Projected costs are estimated using the maximum payment of \$2,500 per landlord and are based on the number of landlords that had failed second inspections in FY 2015 and the projected cost is approximately \$385,000. OHA intends to recoup these costs by paying a lower HAP to the landlord over a 6 month period and anticipates some loss due to landlords that may exit the program and not repay the loan. OHA will rely on its Fraud Unit in the Police Department to pursue and collect from landlords that exit prior to completely repaying the loan.

*Comparison of Outcomes to Baselines and Benchmarks:* OHA began performing pre-qualifying unit inspections in FY 2018 and performed 508 expedited inspections resulting in 119 new HCV tenants being housed and HAP contracts. Sixty two (62) owners received vacancy loss payments (or a Re-rent bonus) as an incentive to re-rent their units to HCV tenants and to continue to participate in the HCV program. On average these units were vacant for 44 days and total amount paid was \$100,730, or \$1,574 per unit. During the FY, 75 new landlords were recruited to enroll in the HCV program and received a sign on bonus of \$500 and added at least 75 new units to the HCV inventory of units. Through the owner recognition program, OHA recognized 258 owners with certificates for being long term partners (5 or more years with 5 or more units) and 10 of the long term owners received plaques for having 10 or more units as OHA continues to show appreciation for its owners through informative and celebratory events.

*Status Update/Schedule:* Planning for the Capital Improvement Payment component was begun in FY 2018 and OHA expects to roll this out in FY 2019.

*Narrative Explanation of Challenges/New Strategies:* There are no challenges or new strategies to methodology to report.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes to metrics, Baselines or benchmarks.

*Changes or Modifications to the Data Collection Methodology:* There are no changes to the data collection methodology to report.

<b>Standard OHA Metrics</b>				
<b>Number of New Landlords Recruited by Payment Incentive</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of new landlords where sign on payment was an	Average number of new landlords where sign on	Average number of new landlords where sign on	Actual number of new landlords where sign on	Yes. OHA greatly exceeded

incentive to enroll in HCV program	payment was an incentive to enroll in HCV program = 0	payment was an incentive to enroll in HCV program = 13 (17% increase)	payment was an incentive to enroll in HCV program = 75	the benchmark.
<b>Standard HUD Metrics</b>				
<b>CE #1: Agency Cost Savings</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).  Pre-qualifying inspections	Cost of task prior to implementation of the activity = (staff salary)* .25 hours * number of files = (\$46.14 * .25) * 1,222 = \$14,096	Cost of task after implementation of the activity =(staff salary)* .10 hours * number of files = (\$46.14 * .10) * 800 = \$3,691	Actual cost of task in dollars after implementation of activity = \$46.14* .10 hours * 772 = \$3,562	Yes. It was exceeded by 4%.
<b>CE #2: Staff Time Savings</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease)  Pre-qualifying inspections	Total amount of staff time dedicated to the task prior to implementation of the activity = .25 hours * 1,222 households = 305 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = .10 hours * 800 households = 80 hours	Actual amount of total staff time dedicated to the task after implementation of the activity = .10 hours * 772 = 77 hours	Yes. It was exceeded.
<b>CE #3: Decrease in Error Rate of Task Execution</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease)  Pre-qualifying inspections	Average error rate of task prior to implementation of the activity as a percentage = 20% (decrease)	Expected error rate of task after implementation of the activity as a percentage = 15% (decrease)	Actual error rate of task after implementation of the activity as a percentage (decrease) = 15%	Yes.

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

*Description of MTW Activity:* During the last several years the Bay Area has rebounded from the recession with a robust economy which has resulted in increased local population and a sharp decrease in available inventory in the rental market, causing rents to rise at rates that are leading the nation. As a result, the number of rent increases requested by owners in the HCV program has risen from 173 requests in January of 2015 to 565 requests at the end of 2015 and is currently averaging 333 requests per month. Compounding this challenge, OHA saw a loss of approximately 824 units from the program during 2015 due to owners opting to leave the program for various reasons.

To stem this tide of owners leaving the program for private market tenants, OHA will offer HCV owners an automatic rent increase that will be initiated by OHA. The amount of the increase will be determined by OHA for targeted small area rental markets identified by OHA. The automatic rent increase amount will be set using multiple data sources for small targeted geographic areas within the larger jurisdiction as identified by OHA. For selected targeted small rental market areas, OHA will conduct a rent increase analysis using internal and external data sources. Internal data sources may include the number of requested and approved increases and the amounts approved, and/or the average rent in the targeted small market area for new Section 8 contracts. The external data sources may include various available data sources including the Consumer Price Index, Zillow, Go Section 8, Rent.com etc. that provide information and data on rental housing market trends in the target area. If a small rental market area increase is warranted and approved by the Executive Director, or his designee, the offers will be made to all property owners in the targeted area who have not received a rent increase in the last twelve months. If the owner elects to accept the increase offered, they will not be eligible for another increase for at least twelve months.

Staff will continue to complete a Rent Reasonableness determination by using at least two comparable units within a one mile radius with like amenities and will notify the landlord of the offer for a new rent amount/increase 120 days prior to the proposed increase. The landlord will have 30 days to accept the offered rent increase and once accepted, OHA will send a lease amendment with the HAP amount and tenant portion to the participant at least 60 days prior to the change. Similarly to current practices under the traditional program, participants will not be able to challenge rent increase amounts. However, the notification that will be provided to each tenant will describe the Reasonable Accommodation and Hardship Policy procedures. Participants may use the Hardship procedures to submit a request to have their case reviewed. Under this activity it is anticipated that participants will have more time to respond to the notice of a rent increase. Currently, participants are issued notices of approved increases within 30 days of the increase. If there is a change in tenancy before the next anniversary date, an owner can request a rent increase per OHA's current process.

*Comparison of Outcomes to Baselines and Benchmarks:* OHA began planning the implementation of this activity during the FY as it requires coordination across multiple groups and department.

*Status Update/Schedule:* Implementation planning and analysis needed to implement this activity were started in FY 2018 including complex quantitative and geospatial analysis to better

understand and predict the way our rental market is changing at the micro-level during FY2019. The analysis is identifying rapidly changing neighborhoods at the census tract level where more than 1,900 HCV families are housed. OHA expects to implement this activity in FY 2020 to determine and execute rent increases after evaluation of area rents to determine a percentage increase for some target areas.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes to the metrics, baselines, and benchmarks included in the Standard HUD Metrics table below.

*Changes or Modifications to the Data Collection Methodology:* There are no changes to the data collection methodology to report.

<b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease). Rent Reasonableness	Cost of task prior to implementation of the activity = (staff salary)* .25 hours * number of files = (\$46.14 * .25) * 3,996 = \$46,093	Cost of task after implementation of the activity = (staff salary)* .08 hours * number of files = (\$46.14 * .08) * 3,996 = \$14,750	Total cost of task in dollars (decrease) = 68%	Yes.
Total cost of task in dollars (decrease). Pre-qualifying inspections	Cost of task prior to implementation of the activity = (staff salary)* .25 hours * number of files = (\$46.14 * .25) * 1,222 = \$14,096	Cost of task after implementation of the activity = (staff salary)* .10 hours * number of files = (\$46.14 * .10) * 800 = \$3,691	Actual cost of task in dollars after implementation of activity = \$46.14 * .10 hours * 772 = \$3,562	Yes. It was exceeded by 4%
<b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours  Rent Reasonableness	Total amount of staff time dedicated to the task prior to implementation of the activity = .25 hours * 3,320 households = 830 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = .08 hours * 3,320 households = 266 hours	Actual amount of total staff time dedicated to the task after implementation of the activity = .08 hours * 3,320	No. Activity is in the planning stage.

Total time to complete the task in staff hours  Pre-qualifying inspections	Total amount of staff time dedicated to the task prior to implementation of the activity = .25 hours * 1,222 households = 305 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = .10 hours * 800 households = 80 hours	households (68% decrease) = 564 hours Actual amount of total staff time dedicated to the task after implementation of the activity = .10 hours * 772 = 77 hours	Yes. It was exceeded by 4%.
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**CE #3: Decrease in Error Rate of Task Execution**

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

**CE #5: Increase in Agency Rental Revenue**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental Revenue /total tenant payment in Dollars (increase).	Rental revenue prior to implementation of the activity (in dollars) = 0	Expected rental revenue after implementation of the activity (in dollars) = TBD	Actual rental revenue after implementation of the activity (in dollars) = TBD	No. Activity is in the planning stage.

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

*Description of MTW Activity:* A local area portability policy that will limit elective moves to jurisdictions within the nine Bay Area counties identified by the Association of Bay Area Governments: Alameda County, Contra Costa County, Marin County, Napa County, San Francisco County, San Mateo County, Santa Clara County, Solano County, and Sonoma County. While the objective of the Housing Choice Voucher program is to provide increased housing options for families, OHA has found that when many households exercise the option to move with their vouchers to neighboring housing authorities, especially those without MTW programs or with higher payment standards, it creates an administrative burden. This activity is designed to allow OHA to mitigate the number and areas of concentration of port out requests,



and their negative impact on program administration and self-sufficiency goals. In FY2016, it was implemented in five counties. The policy will be expanded in the future to include additional jurisdictions as needed.

A hardship policy allows families to move their tenant based vouchers locally under limited circumstances such as the following exceptions:

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

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

OHA allowed current port-out households to remain in their current jurisdiction. However, upon implementation, this policy also will apply to any port-out households that request to port to another jurisdiction.

*Comparison of Outcomes to Baselines and Benchmarks:* During FY 2018, OHA received a total of 434 requests for portability compared to the baseline of 1,100 total requests which is a drop of 39% in port requests overall and the number of requests has continued to decline since last fiscal year. Of the 434 requests received, 146 were for the five restricted counties compared to 924 (84% of total) requests to these counties seen in FY2015. In FY 2018, many of the neighboring counties that were restricted stopped absorbing ports. Twenty-six requests to port were denied to a restricted county because they were not absorbed by the neighboring housing authority.

OHA is starting to see a reduction in port outs due to this activity as neighboring counties have stopped absorbing ports. Historically OHA had over 1,200 housing choice vouchers ported to neighboring jurisdictions that have not been absorbed by the receiving jurisdiction. Currently OHA has 140 vouchers ported to neighboring jurisdictions, which have not been absorbed.

*Status Update/Schedule:* OHA initiated the activity for the first year of implementation for only five counties and does not currently plan to expand the activity to the other four restricted counties.

*Narrative Explanation of Challenges/New Strategies:* No new challenges or strategies in FY 2018.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes to the metrics, baselines, and benchmarks included in the Standard HUD Metrics table below.

*Changes or Modifications to the Data Collection Methodology:* There are no changes to the data collection methodology to report.

<b>Standard HUD Metrics</b>				
<b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).  Local Port-out Requests	Cost of task prior to implementation of the activity = \$46.94 (Staff Salary) * 1.5 hours * 700 port-out requests = \$49,287	Expected cost of task after implementation of the activity = \$46.94 * 1.5 hours * 350 = \$24,643 (50% reduction)	Actual cost of task after implementation = \$10,282 (based on 146 rejected requests)	Yes. An 80 % cost reduction was achieved.
Administering Local Port-outs	Cost of task prior to implementation of the activity = \$46.94 (Staff Salary) * 1 hours * 1,100 port-out requests = \$51,634	Expected cost of task after implementation of the activity = \$46.94 (Staff Salary) * 825 port-out requests = \$38,726 (25% reduction)	Actual cost of task after implementation = \$6,572 (140 annual average of ports administered)	Yes. The benchmark was exceeded.
Total cost of task in dollars.	Total cost of task prior to implementation of the activity = \$49,287 + \$51,634 = \$100,921	Total expected cost of task after implementation of the activity = \$26,644 + \$38,726 = \$63,370 (37% reduction)	Actual cost of task after implementation = \$10,282 + \$6,572 = \$16,854 (73 % reduction)	Yes. The benchmark was exceeded by 100%.
<b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>

Total time to complete the task in staff hours (decrease). Local Port-Out Requests	Total amount of staff time dedicated to the task prior to implementation of the activity = 1.5 hours * 700 requests = 1,050 staff hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 1.5 hours * 350 requests = 525 hours (50% reduction)	Actual staff time dedicated to the task after implementation of the activity = 1.5 hours * 146 requests = 219 hours (79% reduction)	Yes. A 79% reduction was achieved.
Administering Local Port-outs	Total amount of staff time dedicated to the task prior to implementation of the activity = 1 hour * 1,100 = 1,100 staff hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 1 hour * 825 requests = 825 hours (25% reduction)	Actual staff time dedicated to the task after implementation of the activity = 1 hour * 434 requests = 434 hours (61% reduction)	Yes. The benchmark was exceeded by 36%.
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task prior to implementation of the activity = 1,050 + 1,100 = 2,150 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 525 + 825 = 1,350 hours (37% reduction)	Actual amount of total staff time dedicated to the task after implementation of the activity = 219 + 434 = 653 hours (70% reduction)	Yes. The benchmark was exceeded.

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

*Description of MTW Activity:* 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.

*Comparison of Outcomes to Baselines and Benchmarks:* OHA saw a decrease of 100% in the cost of utility allowances paid as Utility Reimbursement Payments (URP). There were no URP payments for public housing families or HCV families during the past year. This is a 100% reduction since inception as all families have had URP payments eliminated. The reduction of utility allowances which took effect at recertification or interim visits, has been staged in. We have started to see the savings decrease over time as the cost of utilities continues to be adjusted upwards and baseline costs have stayed static.

*Status Update/Schedule:* Implementation to pay allowances based on subsidy size were deployed for the HCV residents only and as described in the FY 2015 plan, we expect to develop a phased approach to execute this activity in our Public Housing portfolio.

*Narrative Explanation of Challenges/New Strategies:* OHA did not experience any challenges or the need to develop new strategies for this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes or modifications to the metrics, baselines or benchmarks to report.

*Changes or Modifications to the Data Collection Methodology:* There were no changes or modifications to the data collection methodology to report.

<b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease). Utility Allowance	Cost of task prior to implementation of the activity (in dollars) = \$11,188,104 per year	Expected cost of task after implementation of the activity = \$10,228,812 (9% reduction)	Actual cost of task after implementation of the activity = \$11,413,332	No.
Total cost of task in dollars (decrease). Utility Reimbursement Payment	Cost of task prior to implementation of the activity = Utility Reimbursement Payment = \$220,968 per year	Expected cost of task after implementation of the activity (in dollars) = \$110,484 (50% reduction)	Actual cost of task after implementation of the activity (in dollars) = \$0 (100% reduction)	Yes. A reduction of 100% was achieved.
Total cost of task in dollars (decrease). Staff	Cost of task prior to implementation of the activity = (Staff salary) * .05 hours * number of files = (\$46.14 *.05) * 2,904 = \$6,699	Cost of task after to implementation of the activity = Zero (0)	Cost of task after implementation of the activity = (\$46.14*.05)*0= \$0 (100% reduction).	Yes. A reduction of 100% was achieved
<b>Total cost of task in dollars.</b>	<b>Total cost of task prior to implementation of the activity = \$11,188,104 + \$220,968 + \$6,699 = \$11,415,771</b>	<b>Total expected cost of task after implementation of the activity = \$10,228,812 + \$110,484 = \$10,449,780 (8.5% reduction)</b>	<b>Actual cost of task after implementation of the activity = \$11,413,332 + 0 = \$11,413,332 (1% reduction)</b>	<b>No. A 1% reduction was achieved instead of the 8.5% predicted.</b>
<b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to	Total amount of	Expected	Actual amount	Yes. The

complete the task in staff hours  Utility Reimbursement Payment	staff time dedicated to the task prior to implementation of the activity = .05 hours * 2,909 checks = 145 hours	amount of total staff time dedicated to the task after implementation of the activity = 0 hours * 2,909 checks = 0 hours	of staff time dedicated to the task after implementation of the activity = 0.05 hours * 0 checks = 0 hours	Benchmark was achieved.
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***CE #3: Decrease in Error Rate of Task Execution***

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	OHA is working with the parameters of the new business system to determine how error rate of these tasks can be tracked. Custom solutions may need to be developed with the vendor and a solution is not readily available at this time.			

***CE #5: Increase in Agency Rental Revenue***

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue/total tenant payment in dollars (increase).  Housing Choice Voucher (HCV)	Rental revenue prior to implementation of the activity (in dollars) = \$4,343,040	Expected rental revenue after implementation of the activity (in dollars) = \$5,191,848 (20% increase)	Actual rental revenue after implementation of the activity (in dollars) = \$4,934,562 (14% increase)	No. A 14% increase was achieved.
Rental revenue/total tenant payment in dollars (increase).  Public Housing	Rental revenue prior to implementation of the activity (in dollars) = \$2,215,116	Expected rental revenue after implementation of the activity (in dollars) = \$2,222,460 (Less than 1% increase)	Public Housing sites have not implemented the activity	
<b>Total rental revenue/total tenant payment in dollars (increase). Public Housing and HCV</b>	<b>Total rental revenue prior to implementation of the activity (in dollars) \$6,558,156</b>	<b>Total expected rental revenue after implementation of the activity (in dollars) = \$7,414,308 (12% increase)</b>	<b>Not implemented</b>	
<b>Total rental revenue/total tenant</b>	<b>Total rental revenue prior to implementation</b>	<b>Total expected rental revenue after</b>	<b>Actual rental revenue after implementation</b>	<b>No. A 14% increase was achieved.</b>

payment in dollars (increase).	of the activity (in dollars) \$4,343,040	implementation of the activity (in dollars) = \$5,191,848 (20% increase)	of the activity (in dollars) = \$4,934,562	
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#### MTW Activity #14-01: Alternative Recertification Schedules

*Description of MTW Activity:* Regulations require that a household's income is recertified for program eligibility and rent calculations once a year. In FY 2007, MTW activity #07-01 was approved allowing for a triennial recertification schedule for elderly and/or disabled households on a fixed income in the Public Housing and Section 8 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 Section 8 program and at two senior-designated properties in the Public Housing program. This schedule has been effective at reducing staff time and costs, as well as, being less intrusive and time consuming for residents. Activity #14-01 incorporates changes made by Activity #07-01 and changes the recertification schedule for wage earning households to once every two years. All households that report no income, no income from wages, or temporary income remain on an annual recertification schedule to report increases in income.

*Comparison of Outcomes to Baselines and Benchmarks:* OHA and participant families will experience time savings related to the forgone recertifications. 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.

*Status Update/Schedule:* Initiated the activity for the first year of implementation and experienced challenges with the new business system. OHA worked with the business system vendor to explain the design of this activity and develop a custom modification to accommodate the activity. OHA is waiting for the vendor to deliver the solution.

*Narrative Explanation of Challenges/New Strategies:* Initiated the activity for the first year of implementation. OHA experienced challenges with implementation due to the new business system that was implemented in 2015 and met with the vendor to specify custom modifications to accommodate this activity. Due to system limitations that would cause staff to do manual overrides for recertification dates for all biennial and triennial families, OHA elected to continue with the select group of triennial families for which the activity had been implemented under #07-01. When the software modifications have been delivered and tested, OHA will expand implementation for biennial and the remaining triennial eligible families.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes to the metrics, baselines, and benchmarks included in the Standard HUD Metrics table below.

*Changes or Modifications to the Data Collection Methodology:* There are no changes to the data collection methodology included in the Standard HUD Metrics table below. OHA plans to implement custom changes to its business system to accommodate this activity.



**CE #1: Agency Cost Savings**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).  Fixed Income HCV Reexam Calculation	Cost of task prior to implementation of the activity (in dollars) = \$111,940	Expected cost of task after implementation of the activity = \$57,985 (48% reduction)	Actual cost of task in dollars after implementation of the activity = \$50,483	Yes. The benchmark was exceeded.
Total cost of task in dollars (decrease).  Senior and Disabled Public Housing Reexam Calculation	Cost of task prior to implementation of the activity = \$42,000	Expected cost of task after implementation of the activity (in dollars) = \$21,000 (50% reduction)	Actual cost of task in dollars after implementation of the activity = \$9,825	Yes. The benchmark was exceeded by 53%.
Total cost of task in dollars (decrease).  Wage Earning HCV Reexam Calculation	Cost of task prior to implementation of the activity (in dollars) = \$146,300	Expected cost of task after implementation of the activity = \$73,150 (50% reduction)	Not Implemented	
Total cost of task in dollars (decrease).  Wage Earning Public Housing Reexam Calculation	Cost of task prior to implementation of the activity (in dollars) = \$29,250	Expected cost of task after implementation of the activity = \$14,625 (50% reduction)	Not Implemented	
<b>Total cost of task in dollars (decrease).</b>	<b>Cost of task prior to implementation of the activity (in dollars) = \$329,490</b>	<b>Expected cost of task after implementation of the activity (in dollars) = \$166,760 (51% reduction)</b>	<b>Not applicable</b>	
<b>Total cost of task in dollars (decrease).</b>	<b>Cost of task prior to implementation of the activity (in dollars) = \$153,940</b>	<b>Expected cost of task after implementation of the activity (in dollars) = \$78,985 (51% reduction)</b>	<b>Actual cost after implementation of the activity (in dollars) = \$50,483+\$9,825 = \$60,308</b>	<b>Yes. Benchmark exceeded by 24%.</b>

### CE #2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).  Fixed Income HCV <i>Reexam</i> Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 2,678 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 1,475 hours (37% reduction)	Actual amount of staff time to complete after implementation of the activity in hours = 966	Yes. The benchmark was exceeded by 35%.
Total time to complete the task in staff hours (decrease).  Fixed Income Public Housing <i>Reexam</i> Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 1,680 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 840 hours (50% reduction)	Actual amount of staff time to complete the task after implementation of the activity in hours = 188	Yes. The benchmark was exceeded by 78%.
Total time to complete the task in staff hours (decrease).  Wage Earning HCV <i>Reexam</i> Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 3,500 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 1,750 hours (50% reduction)	Not Implemented	
Total time to complete the task in staff hours (decrease).  Work Eligible Public Housing <i>Reexam</i> Calculation	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 1,170 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 585 hours (50% reduction)	Not Implemented	
<b>Total time to complete the task in staff hours (decrease).</b>	<b>Total amount of staff time dedicated to the task prior to implementat</b>	<b>Expected amount of total staff time dedicated to the task after implementation of the activity (in</b>	<b>Not Applicable</b>	

	ion of the activity (in hours) = 9,028 hours	hours) = 4,650 hours (52% reduction)		
Total time to complete the task in staff hours (decrease). Fixed income Public Housing and HCV only	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours) = 4,358 hours	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours) = 2,315 hours (53% reduction)	Actual amount of staff time to complete the task after implementation of the activity (in hours) = 966+188=1,154	Yes. The benchmark was exceeded by 50%.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Calculation of this metric is unclear since this activity changes the timing of the reexamination and does not change the rent calculation formula.			
SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars) = Public Housing: \$10,926 HCV: \$14,444	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars) = Public Housing: \$12,020 (10% increase) HCV: \$15,888 (10% increase)	Triennial families do not have earned income. All sources of income are fixed. Not applicable	
SS #3: Increase in Positive Outcomes in Employment Status				
Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.				

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

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF prior to implementation of this activity = 100 households	Number of households receiving TANF after implementation of this activity = 90 households (10% decrease)	This is not applicable to families on fixed income. These are the only households where this activity has been implemented.	

**SS #8: Households Transitioned to Self Sufficiency**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA	Number of households transitioned to self-sufficiency prior to implementation of this activity = Zero (0)	Number of households transitioned to self-sufficiency after implementation of this	OHA is currently unable to measure this metric. OHA will explore procedures to track this info	

uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.		activity = 10% of eligible households	or modify the definition.	
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#### **MTW Activity #12-01: Eliminate Caps on PBV Allocations**

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

The Housing Opportunity Through Modernization Act (HOTMA) has increased the per project cap by allowing PBV allocations of up to the greater of 25% or 25 units in a project. Under HOTMA, OHA would be restricted to award PBV allocations of up to 20% of its ACC authorized units and the greater of 25% or 25 units per project. Since inception, OHA has contributed to the creation and preservation of 4,802 PBV assisted units. If the projects were limited to a 25% cap only 826 units would have been eligible for assistance. Through this activity, OHA has been able to assist 1,830 additional units. Table 13 provides a breakdown of the PBVs awarded by development above the 25% cap through FY 2018.

Under the 20% cap, OHA's current budget authority would only allow 2,573 vouchers to be project based. Currently, OHA has 4,802 PBVs allocated, so this activity has allowed an additional 2,229 vouchers above the 20% cap.

*Comparison of Outcomes to Baselines and Benchmarks:* In FY 2018, OHA awarded three new PBV projects through the City of Oakland's NOFA competition. To address the on-going affordable housing crisis, OHA expanded per project limits for PBV to up to 50% of the units at a development and up to 100% for units set aside for seniors and special needs populations for projects awarded through the City's NOFA projects. Only one of the three City NOFA projects, 3268 San Pablo, was awarded PBVs above the 25% of total units project cap, and the 25 units above the project cap are all reserved for homeless or elderly veterans.

Additionally, OHA made a conditional award of 258 PBVs to Brooklyn Basin during the FY. It is a large scale master planned community that will build a total of 465 affordable units. The project is subdivided into four phases: Phase 1, 3 and 4 are for low-income families units whereas Phase 2 is for seniors. For Phase 2, 55 units are above the 25% project cap; the other 3 Phases have 88 units above the 25% project cap. The 4 Phases combined have a total of 143 units above the 25% project cap.

In FY 2018, OHA awarded 168 total units above the greater of 25 units or 25% cap per project at two new construction sites.

Development Name	Total Units	Total PBV Units Above the greater of 25% cap or 25 units per project	Service Enriched
<b>City NOFA Competition – New Construction</b>			
1. 3268 San Pablo	50	25	26
2. Fruitvale Transit Village Phase IIB	180	0	
<b>City NOFA Competition – Rehabilitation</b>			
3. Fruitvale Studios	23	0	
<b>New Conditional Award – New Construction</b>			
Brooklyn Basin	46	143	
		168	

Table 14 Number of PBV Units Awarded Above the 25% Cap				
Site Name	Total Units	25% of the Total Units	Total PBV Units Awarded	PBV Units Awarded Above the 25% Cap
<b>Senior Housing</b>				
Jack London Gateway - Phase II	61	15	60	45
Orchards on Foothill	65	16	64	48
Altenheim Senior Housing Phase II	81	20	40	20
St. Joseph's Senior Apartments	84	21	83	77
Merritt Crossing (aka 6th & Oak Apts.)	70	17	50	33
Lakeside Senior Apartments	92	23	91	68
Lion Creek Crossings Phase V	128	32	127	95
Camino 23	32	8	26	18
Bishop Roy C. Nicholas	17	4	17	13
Sylvester Rutledge Manor	64	16	64	48
Oak Street Apts	<u>39</u>	<u>9</u>	<u>25</u>	<u>16</u>
<b>Senior Housing Total</b>	<b>630</b>	<b>144</b>	<b>515</b>	<b>386</b>
<b>Special Needs Housing</b>				
Jefferson Oaks	102	25	101	76
California Hotel	137	34	135	101
1701 Martin Luther King Jr. Way	25	6	25	19
Redwood Hill Townhomes FY15	28	7	11	4
Redwood Hill Townhomes FY16			16	16
Fruitvale Transit Village - Phase IIA	92	23	66	43
Embark Apartments	62	15	61	46
Rosa Park	11	2	11	9
Eastside Arts & Housing	15	3	10	7
Empyrean	<u>66</u>	<u>16</u>	<u>32</u>	<u>16</u>
<b>Special Needs Housing Total</b>	<b>457</b>	<b>112</b>	<b>426</b>	<b>314</b>
<b>Family Affordable Housing</b>				
Drachma Housing (On-going)	14	3	14	11
Oak Point Limited	31	7	15	8
James Lee Court	26	6	12	6
Drasnin Manor	26	6	25	19
MacArthur Apartments	32	8	14	6
11th and Jackson	71	17	35	18
Cathedral Gardens	100	25	43	18
460 Grand	68	17	34	17
Madison Park Apartments	98	24	96	72
Hugh Taylor House	43	10	35	25
Coliseum Place*	59	14	37	23
Courtyards at Acorn	87	21	30	9
Oak Park Apts	35	8	10	2
Swan Market	18	4	10	6
Hamilton Apts-(Mod Rehab Conversion)	92	23	92	69
Drachma Housing	19	4	11	7
International Blvd Apts	30	7	18	11
Northgate Apts	41	10	14	4
Stanley Avenue Lofts	24	6	13	7
Adeline Street Lofts	38	9	20	11
Westlake Christian Terrace West	200	50	121	71
Seven Directions (add to 18 in-place)	36	9	10	19
Fox Court Apts (add to 20 in-place)	80	20	13	13
Madsion Apts (add to 19 in-place)	78	19	31	31
Kenneth Henry Ct (add to 13 in-place)	<u>51</u>	<u>12</u>	<u>15</u>	<u>16</u>
<b>Family Affordable Housing Total</b>	<b>568</b>	<b>137</b>	<b>360</b>	<b>223</b>
<b>OHA Former Public Housing</b>				
OHA Scattered Sties (On going)	1,554	388	1,554	1,166
Tassafaronga Village Phase I	137	34	80	46
Tassafaronga Village Phase II	<u>20</u>	<u>5</u>	<u>19</u>	<u>14</u>
<b>Former Public Housing Total</b>	<b>1,711</b>	<b>427</b>	<b>1,653</b>	<b>1,226</b>
<b>Total Units</b>	<b>3,366</b>	<b>826</b>	<b>2,954</b>	<b>2,149</b>



\*Family and Special Needs

The developments shaded in gray received new PBVs awarded in FY 2018.

*Status Update/Schedule:* This activity remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* Metrics were modified to include the new HOTMA changes for PBV caps of exceeding the greater of 25 units or 25% of the project.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>Standard HUD Metrics</b>				
<b>HC #4: Displacement Prevention</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity = Zero(0)	Expected households losing assistance/moving after implementation of the activity = Zero (0)	Number of households losing assistance/moving after implementation of the activity = Zero (0)	No.
<b>Standard OHA Metrics</b>				
<b>Additional Units of Housing Made Available</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of new housing units made available for households at or below 80% AMI as a result of the activity	Number of PBV units awarded above the greater of 25 units or 25% of the total units in a project = Zero (0) Number of PBV	Expected number of PBV units awarded above the greater of 25 units or 25% of the total units in a project = 69 units Expected number of PBV units awarded	Actual number of PBV units awarded above the greater of 25 units or 25% of the total units in a project = 168 units Actual number of	Yes – exceeded by 99 units awarded above the 25 units or 25% cap.

(increase). If units reach a specific type of household, give that type in this box.	units awarded above 20% of total units in voucher program = Zero (0) units	above 20% of total units in voucher program = 8 units	PBV units awarded above 20% of total units in voucher program = Zero (0) units	
<b>Units of Housing Preserved</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0) units	Expected housing units preserved after implementation of the activity = 100 units	Actual housing units preserved prior to implementation of the activity = 0 units	No.
<b>Increase in Resident Mobility</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 77 households	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 143 households	Yes. Benchmark was exceeded by 66 units.
<b>Households Assisted by Services that Increase Housing Choice</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase housing choice	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = Zero	Actual number of households receiving these services after implementation of the activity = 25	Yes. 26 new households will receive services and are

(increase).		(0) households	households	units set aside for special needs populations.
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#### MTW Activity #11-01: PBV Occupancy Standards

*Description of MTW Activity:* Modify the occupancy standards in the PBV program to be consistent with occupancy standards required by other state or locally administered funding in a development (e.g. LIHTC program). Based on family composition, under this activity a family may qualify for a larger bedroom size than they would have under the previous policy. The activity applies to new participants in the PBV program and to in-place families whose household composition changes would require them to relocate.

*Comparison of Outcomes to Baselines and Benchmarks:* During the FY18, 14 new leases were executed under the Modified PBV occupancy standards. These families would not have qualified for the PBV assisted unit under the Housing Choice Voucher occupancy standard. Additionally, six (6) in-place PBV assisted families had a change in their family composition during the FY that would otherwise require them to relocate to a smaller unit. These families remained eligible to stay their current unit under the Modified occupancy standard. The outcomes of this activity largely depend on participant families requesting changes to household composition, and as a result the activity was not utilized as much as expected.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* Changes to the metrics, baselines, and benchmarks are included in the table below.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

Standard HUD Metrics				
HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	Number of Households losing assistance or forced to move prior to implementation of the activity = Three (3) households	Expected households losing assistance/moving after implementation of the activity = Zero (0) households	Number of households losing assistance/moving after implementation of the activity = 6 households (in-place families)	Yes. The benchmark was exceeded as five (6) families retained housing without moving due to family composition changes that might have required them

				to relocate to a smaller unit.
<b>HC #5: Increase in Resident Mobility</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = Zero (0) households	Number of households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 14 households (new lease ups)	Yes. (14) New families were able to lease units under the modified occupancy standard and increasing their housing choice.
<b>Standard OHA Metrics Additional Units of Housing Made Available</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of households who would not qualify for an available unit based on household composition = Zero (0) households	Expected housing units of this type after implementation of the activity = 5 households	Number of households who qualified for a unit that would not have without this activity = 14 households.	Yes. The benchmark was exceeded with 14 households qualifying for units.
<b>Units of Housing Preserved</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of housing units preserved for households at or below 80% AMI that would otherwise not be	Housing units preserved prior to implementation of the activity = Zero (0) units Verify	Expected housing units preserved after implementation of the activity = 2 units	Actual housing units preserved after implementation of the activity = 6 units	Yes. The benchmark was exceeded by 4 units.

available (increase). If units reach a specific type of household, give that type in this box.				
<b>Households Assisted by Services that Increase Housing Choice</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = 5 households	Actual number of households receiving these services after implementation of activity = 6 households are in sites with on-site services providers.	Yes. The benchmark was exceeded by 20%.

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

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

*Comparison of Outcomes to Baselines and Benchmarks:* OHA utilized the activity in FY 2018 to move one household from public housing to a PBV unit due to an emergency transfer situation. OHA has identified seventy-five Shelter Plus Care Tenant Based Rental Assistance Program (TRA) clients eligible for acceptance into the Housing Choice Voucher program based on program participants being stably housed and receiving minimal case management. In FY 2018, a total of fifty three households have converted to HCV out of fifty six that passed eligibility screening. Sixteen clients refused conversion and seven landlords refused to participate in the HCV program. The County will continue to work with OHA and its clients to prepare for the HCV program. Using this activity to transition clients from Shelter Plus Care to

the HCV program allows resources to be freed up to house new families in the Shelter Plus Care program.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* OHA is seeing challenges with monitoring real-time vacancy information for all types of program units across the portfolio to manage transfers, reasonable accommodations and other inter portfolio transfer needs. These units are managed in different business systems and through different property management and access to real time unit availability is challenging. OHA is working to develop weekly calls and meetings to discuss unit availability and to raise awareness among different teams and departments of this ongoing need and to develop more standardized processes for these transfers.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* Changes to the metrics, baselines, and benchmarks are included in the table below.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>Standard HUD Metrics</b>				
<b>HC #3: Decrease in Wait List Time</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average applicant time on waitlist in months (decrease)	Average applicant time on waitlist prior to implementation of the activity (in months) (OHA is currently unable to track this metric due to Business System Limitations)	Expected applicant time on waitlist after implementation of the activity (in months) (OHA is currently unable to track this metric due to Business System Limitations)	Actual applicant time on waitlist after implementation of the activity (in months) (OHA is currently unable to track this metric due to Business System Limitations)	
<b>HC #4: Displacement Prevention</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>

Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household give that type. (HCV)	Households losing assistance prior to implementation of activity. (number of households where voucher expires or )	Expected households losing assistance after implementation of activity. (number of households where voucher expires should decrease) This metric does not apply to the goals for this activity and therefore is not something that OHA can measure relative to it.	Actual households losing assistance after implementation of activity. (number of households where voucher expires should decrease) This metric does not apply to the goals for this activity and therefore is not something that OHA can measure relative to it.	
<b>HC #5: Increase in Resident Mobility</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = number of inter-program transfers that occur as result (emergencies, RAs) = 0  Shelter Plus Care = 0	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = number of inter-program transfers that occur as result (emergencies, RAs) = 1  Transfers from Shelter Plus Care = 53	Yes. Benchmark was exceeded.
<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>



Number of households receiving services aimed to increase housing choice (increase).	Households receiving services aimed to increase housing choice prior to implementation of the activity = Zero (0) households	Expected households receiving services aimed to increase housing choice after implementation of the activity = Zero (0)	Actual households receiving services aimed to increase housing choice after implementation of the activity = 53 households	Yes. Benchmark was exceeded.
<b>CE #5: Increase in Agency Revenue</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Rental revenue in dollars prior to implementation of the activity = Zero (0) households	Expected Rental revenue in dollars after implementation of the activity = Zero (0) Amount of revenue increase due to HH that were rightsized due to activity. OHA does not anticipate using this activity to move families across programs to right size them. OHA has an activity in place that allows owners to accept a lower HAP in a larger unit to avoid moving a family.	Actual Rental revenue in dollars after implementation of the activity = \$116.	Yes. One family was moved from public housing to a PBV unit and had a rental increase totaling \$116 before the rent was lowered due to a job loss.

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

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

*Comparison of Outcomes to Baselines and Benchmarks:* Due to high market rate rents and very low inventory of affordable housing, hard to house populations are being adversely affected, as developers opt to convert SRO housing to other uses. In FY 2018, OHA began executing contracts with Board approved partners to provide housing assistance with qualified owners, property managers, and developers of service enriched rental housing through the Building Bridges - SRO local program. All providers had existing service enriched single occupancy housing units which were targeted to serve special needs populations. In FY 2018, contracts were executed with East Bay Asian Local Development Corporation (EBALDC) to provide services enriched housing at two locations: 1) Madrone Hotel- is 32-unit SRO residential building which provides housing for 31 households below 60% AMI. Some residents were formerly homeless and face barriers including physical and mental health issues. 2) San Pablo Hotel – 112 SRO units that house senior residents that were formerly homeless, with physical disabilities, substance abuse issues or a mental health diagnosis. OHA projected to serve 150 households with this activity, but delays in negotiating contracts, inspecting units and determining eligibility caused the numbers served to be lower than expected.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing. OHA is working to complete contracts with new providers and subsequent eligibility assessments and HQS inspections and expects to complete the lease up of the remaining new units in FY 2019.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* Changes to the metrics, baselines, and benchmarks are included in the table below.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>HC #4: Displacement Prevention</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity = Zero(0)	Expected households losing assistance/moving after implementation of the activity = Zero (135)	Number of households who were prevented from losing assistance/moving after implementation of the activity = San Pablo Hotel = 85 Madrone Hotel = 22 Total = 107	No.
<b>HC#1: Additional Units of Housing Made Available</b>				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of units of this type prior to implementation of the activity = Zero (0) units	Expected housing units of this type after implementation of the activity = Zero (150) units	Number of housing units of this type after implementation of the activity = San Pablo Hotel = 85 Madrone Hotel = 22 Total = 107	No.
<b>HC#2: Units of Housing Preserved</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0) units	Expected housing units preserved after implementation of the activity = Zero (150) units	Number of housing units preserved after implementation of the activity = San Pablo Hotel = 85 units Madrone Hotel = 22 Total = 107 units	No.
<b>HC#5: Increase in Resident Mobility</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity =	Number of households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity =  San Pablo Hotel =	No.

		Zero (150) households	85 units  Madrone Hotel = 22 Total = 107 units	
<b>HC#7: Households Assisted by Services that Increase Housing Choice</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = Zero (110) households	Number of households receiving these services after implementation of the activity =  San Pablo Hotel = 45 households  Madrone Hotel = 27 Total = 72 households	No.

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

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

#### **Parents And Children Together (PACT)**

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

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

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

Along with the primary program partners Alameda County Sheriff's Office (ACSO) and the Alameda County Behavioral Health Care Services (ACBHS) Department, OHA continues to determine the strategic direction and lead the multi-partner board to address program improvements. Additions to the program structure included a sober living agreement; an alumni participation agreement, stronger coordination of multi-agency intervention for lease non-compliance and additional on-site program activities to enhance parent/child engagement and workforce development for older youth and adults. During FY 2018, ASCO hired a new supportive service provider Youth3 and Family Services Bureau (YFSC) to provide services to program participants in addition to the Family and Community Partnerships department within OHA.

*Comparison of Outcomes to Baselines and Benchmarks:* Families assisted under this activity represent some of the local, non-traditional households served by OHA. There were four new PACT admissions during the fiscal year and overall on average thirteen participants participated in the program. Of the thirteen participants, one household was withdrawn due to program and lease compliance issues and four graduated into stable housing.

Through the PACT program resources, participants work to become employed and increase their incomes through steady employment. The average earned income for all participant households was \$6,037. Two of the participants earned an average of \$42,261, but due to the low earnings of other participants and income from TANF and general assistance the average benchmark was not achieved. OHA relies on its community partners to provide skill building and job development workshops that help increase the employability of the PACT participants and to refer participants to the Workforce Development initiative within the OHA Family and Community Partnerships Department.

Performance metrics on participant savings and subsidy cost savings were not measurable at the time of this report due to OHA's and partner agencies limited capacity to track performance. OHA is working with the services provider to track metrics for this activity.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing. Referrals from ACSO of Dads Acquiring and Developing Skills (DADS) program participants occurred during FY 2018 and there is currently one DADS referral housed through PACT.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* No changes were made to the metrics, baselines or benchmarks for the PACT program.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

#### **Standard HUD Metrics PACT Program HC #5: Increase in Resident Mobility**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 8 households (PACT)	Households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 13 households (4 new admissions)	Yes. The PACT benchmark was exceeded.
<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 8 households	Number of households receiving these services after implementation of the activity = 13 PACT households	160% of the PACT benchmark was achieved.
<b>Standard OHA Metrics Additional Units of Housing Made Available</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of households who would not qualify for an available unit based on household composition = Zero (0) households	Expected housing units of this type after implementation of the activity = 8 households	Average number of households made available after implementation of this activity = 13 PACT households	Yes. 160% of the PACT benchmark was achieved.
<b>Increase in Household Income</b>				



Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy in dollars prior to implementation of this activity = Zero (0)	Average earned income of households affected by this policy in dollars after implementation of this activity = \$12,740 (1040 hours at \$12.25 minimum wage) - PACT	Average earned income of households affected by this policy in dollars = \$6,037 (PACT)	No. PACT did not achieve the benchmark.

***Increase in Household Savings***

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average amount of savings/escrow of households prior to this policy = Zero (0) in dollars.	Average amount of savings/escrow of households after implementation of this policy = \$500 in dollars	Amount of savings/escrow of households after implementation of this policy = \$0 dollars	No. This benchmark is not currently measurable, but OHA is exploring redesigning the FSS Program to allow PACT and other local program participants.

***Increase in Positive Outcomes in Employment Status***

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category:				
(1) Employed Full- Time	Number of participants employed at start of program = Zero (0)	Number of participants employed at during program = Zero (0)	Number of participants employed at during program = 2	Yes. benchmark achieved.
(2) Employed Part-	Number of	Number of	Number of	Yes. 300% of

Time	participants employed at start of program = Zero (0)	participants employed during program = Two (2)	participants employed during program = 6	the benchmark was achieved.
(3) Enrolled in an Educational Program	Number of participants in Educational program at start of program = Zero (0)	Number of participants in Educational program during program = Three (3)	Number of participants in Educational program during program = 6	Yes. Benchmark was exceeded.
(4) Enrolled in Job Training Program	Number of participants in Job Training program at start of program = Zero (0)	Number of participants in Job Training program during program = one (1)	Number of participants in Job Training program during program = 2	Yes.
(5) Unemployed	Number of participants unemployed at start of program = Eight (8)	Number of participants unemployed during program = six (6)	Number of participants unemployed during program = 8	No.
(6) Other – Drug Rehab Counseling	Number of participants in drug rehab = 0	Number of participants in drug rehab = 0	Number of participants in drug rehab = no data available	No data available.
Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.				
<b>Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance = eight (8)	Number of households receiving TANF assistance = eight (8)	Number of households receiving TANF assistance during program = nine (9)	Yes.
<b>Households Assisted by Services that Increase Self Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households	Number of Households	Expected number of	Number of households	Yes. The benchmark

receiving services aimed to increase self-sufficiency (increase).	receiving services prior to implementation of the activity = Zero (0)	Households receiving services after implementation of the activity = 10 households	receiving these services after implementation of the activity = 13 households	was exceeded.
Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	OHA's current business system and partner does not have the capacity to accurately measure this metric. The partner agencies were not obligated to track this information during the fiscal year. OHA will explore a customization to track this information with the business system vendor.			
Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self- sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Number of households transitioned to self-sufficiency prior to implementation of this activity = Zero (0)	Expected number of households transitioned to self-sufficiency after implementation of this activity = 3 households	Number of households transitioned to self-sufficiency after implementation of this activity = 4 Households	Yes. Benchmark was exceeded by one household or 25%,

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

In FY 2018, OHA began implementing the Building Bridges (BB) initiative which is comprised of several local programs. The BB-Shared and Transitional local programs are designed to develop a model of targeting housing resources, alongside supportive services funding, toward a household to dramatically improve outcomes for the household through County, City and housing authority systems alignment. In FY 2018, partners such as Operation Dignity and the City of Oakland (Families in Transition & Matilda Cleveland) offered 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 and began serving families through Building Bridges in November 2017. On average, 17 households were served during the FY.

**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 and on average served 3 families during the FY.

**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 and on average served 4 families during the FY.

**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 and on average served 8 families during the FY.

### **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 and on average served 11 families during the FY.

### **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 senior 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 and served 6 families.

*Comparison of Outcomes to Baselines and Benchmarks:* On average, 50 families were assisted through the Building Bridges (Shared and Transitional) housing program. Contracts were signed with providers at various times throughout the year with several coming on board in only the last few months of the FY. Original baselines and benchmarks were projected through activity #11-03 and OHA has established new projections under this activity for the Shared and Transitional Housing families that are served through Building Bridges. Performance metrics on participant savings and subsidy cost savings were not measurable at the time of this report due to OHA's and partner agencies limited capacity to track performance. OHA is working with the services provider to track metrics for this activity.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing. OHA anticipates adding at least one more provider in FY 2019 and increasing the families served through existing providers to program capacity.

*Narrative Explanation of Challenges/New Strategies:* No challenges to report for this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* New Baselines and Benchmarks were established for the Building Bridges component of this activity.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>Standard HUD Metrics Building Bridges Program HC #5: Increase in Resident Mobility</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 28 households	Households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 28 households	Yes.
<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>

Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 50 households	Number of households receiving these services after implementation of the activity = 50 households	Yes, The benchmark was achieved.
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**Standard OHA Metrics**  
**Additional Units of Housing Made Available**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of households who would not qualify for an available unit based on household composition = Zero (0) households	Expected housing units of this type after implementation of the activity = 50 households	Average number of households made available after implementation of this activity = 50 households	Yes. The benchmark was achieved.

**Increase in Household Income**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy in dollars prior to implementation of this activity = \$917	Average earned income of households affected by this policy in dollars after implementation of this activity = \$1,000	Average earned income of households affected by this policy in dollars \$1,075	Yes. Data currently available for only two providers.

**Increase in Household Savings**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average amount of savings/escrow of households prior to this policy = Zero (0) in dollars.	Average amount of savings/escrow of households after implementation of this policy = \$0 in dollars	Amount of savings/escrow of households after implementation of this policy = \$0 dollars	No. This benchmark is not currently measurable, but OHA is exploring with the partners a way to track this information.
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***Increase in Positive Outcomes in Employment Status***

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

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Report the following information separately for each category:				
(1) Employed Full- Time	Number of participants employed at start of program = Zero (0)	Number of participants employed during program = zero	Number of participants employed at during program = 5	Yes. Benchmark achieved.
(2) Employed Part-Time	Number of participants employed at start of program = Zero (0)	Number of participants employed during program = Two (2)	Number of participants employed during program = 3	Yes. The benchmark was exceeded.
(3) Enrolled in an Educational Program	Number of participants in Educational program at start of program = Zero (0)	Number of participants in Educational program during program = One (1)	Number of participants in Educational program during program = 2	Yes. Benchmark was exceeded.
(4) Enrolled in Job Training Program	Number of participants in Job Training program at start of program = Zero (0)	Number of participants in Job Training program during program = one (1)	Number of participants in Job Training program during program = 1	Yes.
(5) Unemployed	Number of participants unemployed at start of program = 28	Number of participants unemployed during program = 27	Number of participants unemployed during program =27	Yes.
(6) Other – Drug Rehab Counseling	Number of participants in drug	Number of participants in	Number of participants in	Yes. Benchmark

	rehab =0	drug rehab =1	drug rehab =5	was exceeded.
Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.				
Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance = zero (0)	Number of households receiving TANF assistance = zero (0)	Number of households receiving TANF assistance during program = zero (0)	Households do not have children.
Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Number of Households receiving services prior to implementation of the activity = Zero (0)	Expected number of Households receiving services after implementation of the activity = 14 households	Number of households receiving these services after implementation of the activity = 19 households	Yes. The benchmark was exceeded.
Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	OHA's current business system and partner does not have the capacity to accurately measure this metric. The partner agencies were not obligated to track this information during the fiscal year. OHA will explore a customization to track this information with the business system vendor.			
Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households	Number of households	Expected number of	Number of households	Yes.

transitioned to self- sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	transitioned to self-sufficiency prior to implementation of this activity = Zero (0)	households transitioned to self-sufficiency after implementation of this activity = 3 households	transitioned to self-sufficiency after implementation of this activity = 7 Households	
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#### **MTW Activity #10-01: Specialized Housing Programs**

*Description of MTW Activity:* In partnership with the Alameda County Sheriff's Department (ACSO), OHA operates the PACT program which takes referrals from the MOMS and DADS programs operated by ACSO. This activity increases the allocation of resources to the PACT program to improve outcomes and enhance program coordination among partners.

OHA created the PACT program and implements this activity in conjunction with Activity 11-05. The partnerships established with the ASCO, the Alameda County Behavioral Health Care Services (ACBHS) Department, and family supportive services subcontractors allow funds to be leveraged to provide services to participants of the PACT program and are authorized under this activity. These funds are critical to the success and expansion of the existing PACT program.

*Comparison of Outcomes to Baselines and Benchmarks:* In FY 2018, OHA collaborates with community partners that provide dedicated staff to provide on-site case management and training and operational support funding from the Inmate Welfare Fund. OHA exceeded the expected benchmark by \$142,836 by leveraging \$392,836 from local non-profits and public agencies in salaries and operating costs.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes to the baselines and benchmarks for this activity.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>Standard HUD Metrics</b>				
<b>CE #4: Increase in Resources Leveraged</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars) = Zero (0)	Amount leveraged after implementation of the activity (in dollars) = \$250,000	Actual amount leveraged after implementation of the activity = \$392,836	Yes. Benchmark exceeded by \$142,836.

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

*Description of MTW Activity:* 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 24 months before being terminated from the program.

*Comparison of Outcomes to Baselines and Benchmarks:* The baselines for this activity are set at zero given that existing program regulations require all families that reach the zero HAP status are terminated after six months. Over the course of the Fiscal Year, 226 families have been in a “zero HAP” status, with 149 families using the safety net of the additional 18 months on the program to maintain their income stability. During the year, 14 families continued in this status due to rent increases. Thirty six (36) families achieved self-sufficiency as defined by this activity, by exiting the HCV program after being at zero HAP for 24 months. The outcomes demonstrate that while households are able to benefit from the protections provided under this activity, the majority of families return to subsidy due to various reasons and do not exit the program to “self-sufficiency” as it is defined. With the extremely competitive and expensive rental market in the Bay Area, families seem to opt for decreasing income or changing family composition over exiting the program. This outcome demonstrates the need for this activity, especially in times of increasing rents and a rental market with low inventory.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

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

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There were no changes or modifications to the metrics, baselines or benchmarks to report.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>Standard HUD Metrics</b>
<b>SS #1: Increase in Household Income</b>

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars). \$47,711 for 109 households	Expected average earned income of households affected by this policy after implementation of the activity (in dollars) = \$47,711 (0% increase)	Actual average income of households affected by this policy = \$67,007	Yes. It was exceeded by 40%.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Number of households receiving TANF assistance prior to implementation of this activity = 11 households	Number of households receiving TANF assistance after implementation of this activity = 10 (10% decrease)	Number of Households receiving TANF = 5 households	Yes. The outcomes exceeded the benchmark with a 55% decrease.
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average amount of Section 8 and/or 9 subsidy per household prior to implementation of this policy in dollars = \$995	Average amount of Section 8 and/or 9 subsidy per household after implementation of this policy in dollars = \$200 (80% decrease)	Average amount of Section 8 and/or 9 subsidy per household after implementation of this policy in dollars = \$0	Yes.
SS #7: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
PHA rental revenue/HAP in dollars (increase).	Due to challenges with the current business system, OHA is not able to measure this metric at this time. The current capacity of the business system is limited and does not allow reporting on the increase in rent as a result of self-sufficiency activities.			
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Number of households transitioned to self sufficiency (self-termination from the program) = Zero (0) families	Number of households transitioned to self sufficiency = 18 families	Actual number of households transitioned to self-sufficiency = 36	Yes. The benchmark was achieved and exceeded by 100%.
<b>Standard OHA Metrics</b>				
<b>Households Assisted by Services that Increase Self Sufficiency</b>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	OHA began referring families to the Family and Community Partnerships (FCP) department to receive services and going forward OHA will develop procedures to track zero HAP participants in FCP programs and services. Currently, only a few FCP program participants are tracked in the OHA business system.			

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

*Description of MTW Activity:* Modify PBV program rules to allow HAP contracts to be executed for non-contiguous buildings.

*Anticipated Impacts:* Reduce agency administrative costs associated with staff time and preparing, executing, and managing the HAP contracts.

*Status Update:* Ongoing. One of the projects awarded for PBV allocations, Drachma LP, will utilize this activity in FY19. This activity was not used in Fiscal Year 2018 to combine any HAP contracts for Non-Contiguous scattered sites.

*Changes or Modifications to Activity:* OHA does not anticipate any changes or modifications to the activity in FY 2018.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes to the metrics, baselines, and benchmarks included in the Standard HUD Metrics.

<b>Standard HUD Metrics</b>				
<b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$70 (staff salary/hour) * 80 hours = \$5,600	Expected cost of task after implementation of the activity = \$70 * 10 hours = \$700	Actual cost of task after implementation of the activity = zero	No. The activity was not used during FY 2018.
<b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 10 hours/contract * 8 contracts = 80 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 10 hours/contract * 1 contracts = 10 Hours	Actual time to complete the task after implementation of the activity = zero	No. The activity was not used during FY 2018.

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

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

*Comparison of Outcomes to Baselines and Benchmarks:* This activity was not used during FY 2018 as approval of a pending disposition application was not received during the FY.

*Status Update/Schedule:* OHA anticipates using this activity in FY 2019 for a disposition of Public Housing units. The activity will remain inactive until OHA receives approval of the disposition application and begins conversion of the units to the project-based voucher program.

*Narrative Explanation of Challenges/New Strategies:* No new challenges or strategies to report.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* Changes to the metrics, baselines, and benchmarks are included in the table below.



*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$1,400 x 50 projects = \$70,000	Expected cost of task after implementation of the activity = \$2,200 * 6 AMP areas = \$13,200	Actual cost of task after implementation of the activity = zero	Activity was not used in FY 2018.
<b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 4 hours/contract * 50 contracts = 200 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 10 hours/contract * 6 contracts = 60 Hours	Actual amount of total staff time dedicated to the task after implementation of the activity = zero	Activity was not used in FY 2018.
<b>HC #2: Units of Housing Preserved</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0)	Expected housing units preserved after implementation of the activity = 500 units preserved	Actual housing units preserved after implementation of the activity = zero	Activity was not used in FY 2018.
<b>HC #4: Displacement Prevention</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>

Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number) = 60 units	Expected households losing assistance/moving after implementation of the activity (number) = Zero (0)	Actual households losing assistance/moving after implementation of the activity (number) = Zero (0)	Activity was not used in FY 2018.
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#### MTW Activity #10-05: Acceptance of Lower HAP in PBV Units

*Description of MTW Activity:* As a result of disposition, some households may meet the definition of “over-housed” based on differences in the occupancy policies in the Public Housing and Section 8 programs. In these situations, this activity allows the landlord or management agent to accept a lower HAP based on the appropriate number of bedrooms for the family as opposed to the actual number of bedrooms in the unit. This activity is also being used 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.

*Comparison of Outcomes to Baselines and Benchmarks:* Ensure access to housing for families impacted by disposition and preservation of affordable units for families whose subsidy standard is less than the PBV unit size. This activity was initiated in FY2010 as a result of the conversion of Public Housing scattered site units to the PBV program. In house families in former Public Housing scattered sites were allowed to remain in place with tenant protection voucher (TPV) assistance, which does not require enforcement of the minimum number of family members per bedroom size, as is the case with PBV assisted units. This activity continues to be used for the former Public Housing sites, and for PBV sites to reduce vacancies when a smaller unit is unavailable and there are no appropriately sized families on the waitlist. In FY 2018, three new families were assisted under this activity.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* Changes to the metrics, baselines, and benchmarks are included in the table below.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

HC #2: Units of Housing Preserved				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0)	Expected housing units preserved after implementation of the activity = 60 units preserved	Actual housing units preserved after implementation of the activity = 3 units preserved	No. The benchmark was established when the 2010 disposition happened and will be revised with the next Plan.
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**SS #6: Reducing Per Unit Subsidy Costs for Participating Households**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). = \$645	Expected average subsidy per household affected by this policy after implementation of the activity = zero (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity = \$1,625 (in dollars).	Yes.

**HC #4: Displacement Prevention**

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number) = 0 units	Expected households losing assistance/moving after implementation of the activity (number) = Zero (0)	Actual households that would lose assistance or have to move after implementation of the activity (number) = one (0)	Yes. It was exceeded.

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

*Description of MTW Activity:* 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.

Eligibility requirements are that SBHAP program participants pay no more than 30% of their income towards rent and must meet the same income limits as the Section 8 program and meet the immigration eligibility requirements. All housing units subsidized must meet the Housing Quality Standards (HQS). This activity also provides flexibility to implement its Sponsor-Based Housing Assistance Program and expand its portfolio of local, non-traditional units that serve households below 80% of the Area Median Income. Participant families are assisted by providers contracted by the City of Oakland and must receive supportive services along with the housing assistance offered under the activity. OHA's contract with the City leverages resources, expertise, and community connections to deliver housing related services to on average 125 hard-to-house households on an annual basis in Oakland.

First Place for Youth supports the young adults in the SBHAP program with a variety of supportive services. An ongoing focus was on education and employment and making sure the youth in the program are informed about college access and alternative programs. The goal of the My First Place Program is to see all of the youth served accessing the community resources available to them. Education and Employment Specialists (EES) work closely with the youth on the four E's. Explore with them their career interests, or if they do not have a career in mind, explore their hobbies. Many youth do not realize that the things they like to do in their free time, could lead them to a career choice. Once they have honed in on ideas for careers, EES's help to educate the youth on what it means to pursue that goal. What education is needed, what stackable certificates can be achieved to reach the goal, and where do they start. The next step is to help the youth experience and explore career options. This is achieved by inviting guest speakers to present, volunteering, job shadowing or spending time one on one with a professional in that field. Finally, the EES's work with the youth to help them get employment in their chosen field and to gain hands on experience.

In addition to the Education and Employment Specialists, each young adult has a trauma-trained, strength based Youth Advocate (YA) that they work with weekly. YA's 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. YA's work closely to determine if youth participants need additional mental health support or community resources and help connect them to the resources that will best allow them to feel supported and balanced, so they can focus on their education and employment goals.

An additional function of this activity initially was to mitigate any negative impacts of the public housing disposition for households that may not have been housed because they were over-income for the new project-based voucher units, or may have experienced a significant rent increase as a result of the conversion from public housing to a project-based voucher subsidy. Originally 44 households were on this program and there are now only 18 households left of the original LHAP families and only two families have elected to take their tenant protection voucher and move during FY 2018.

*Comparison of Outcomes to Baselines and Benchmarks:* Families assisted under this activity represent several of the local, non-traditional households served by OHA exercising its MTW authority. During FY 2018, two former disposition households utilized their voucher and moved off of the LHAP program leaving an average of 18 households at the end of the fiscal year to be assisted under this activity. On average, the SBHAP program served 112 families per month.

The goal of SBHAP is to serve a minimum of 100 and maximum of 125 families on average per month.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* This activity is experiencing similar challenges in a tight rental market where landlords have multiple options for tenants. Since this population is hard to house with many service needs, it is challenging to maintain and recruit new landlord participants. Partner agencies work closely with OHA, clients and landlords to continue to ensure that any leasing challenges are addressed in a timely manner. In FY 2018, OHA and its partners continued a Step-Down initiative, where participants that have remained housed successfully for one year, will be offered a voucher to use to move or remain in place if the landlord chooses to enter the HCV program. Convincing existing landlords to enter the Housing Choice Voucher program has been a challenge. OHA is finding that tenants are tentative to accept a voucher because it will require transition to new case management and any change to their stable environment is a cause for anxiety, so the numbers using this opportunity have not been as high as expected.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* Changes to the metrics, baselines, and benchmarks are included in the table below.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>Standard HUD Metrics</b>				
<b>HC #1: Additional Units of Housing Made Available</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase) <b>LHAP</b>	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 39	Actual housing units of this type after implementation of the activity = 18	No. Only 51% of the benchmark was achieved.
<b>SBHAP</b>	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 110	Actual housing units of this type after implementation of the activity = 112	Yes. The targeted number of families served was exceeded.
<b>Total number of new housing units made available for households at or below 80% AMI</b>	<b>Total number of households who would not qualify for an available unit based on household composition = Zero</b>	<b>Total expected housing units of this type after implementation of the activity =</b>	<b>Total housing units of this type after implementation of the</b>	<b>No. Only 87 % of the benchmark was met.</b>

as a result of the activity (increase).	(0)	149	activity = 130	
<b>HC #5: Increase in Resident Mobility</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). <b>LHAP</b>	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 39	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 18	No. 46% of the benchmark was achieved.
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). <b>SBHAP</b>	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 110	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 112	Yes. The benchmark was met and exceeded.
<b>Total number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).</b>	<b>Total households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)</b>	<b>Total expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 149</b>	<b>Total actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 130</b>	<b>No. Only 86% of the benchmark was achieved.</b>
<b>HC #7: Households Assisted by Services that Increase Housing Choice</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>

Number of households receiving services aimed to increase housing choice (increase). <b>LHAP</b>	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 14	Actual number of households receiving these services after implementation of the activity = 0	No. 0% of the benchmark was achieved. These households do not receive services.
Number of households receiving services aimed to increase housing choice (increase). <b>SBHAP</b>	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 110	Total actual number of households receiving these services after implementation of the activity = 112	Yes. The benchmark was achieved.
<b>Total number of households receiving services aimed to increase housing choice (increase).</b>	<b>Total households receiving this type of service prior to implementation of the activity = Zero (0)</b>	<b>Total expected number of households receiving these services after implementation of the activity = 124</b>	<b>Total actual number of households receiving these services after implementation of the activity = 112</b>	<b>No. 90% of the benchmark was achieved.</b>

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

*Description of MTW Activity:* Utilize Single Fund Flexibility to leverage funds to preserve affordable housing resources and create new affordable housing opportunities in Oakland.

*Comparison of Outcomes to Baselines and Benchmarks:* In FY 2018, OHA completed construction and lease up of Acts/Cyrene, a development located at 94<sup>th</sup> and International consisting of 59 units of one, two and three bedrooms for families with income from 30-50% of the area median income. The site has a commercial space and on-site community space for supportive services, a computer room, kitchen, tot lot and laundry facilities. OHA purchased the land and provided additional MTW funds as both construction and permanent funding sources. OHA has 465 units in pre-development for the Brooklyn Basin development in partnership with the City of Oakland and Mid-Penn Housing Construction. An additional 51 units were rehabilitated in OHA's existing project-based Section 8 portfolio. The chart of units in Appendix D shows the list of units in these developments and the status for all units under construction or rehabilitation.

- Brooklyn Basin – A 65-acre site that will be completely transformed, with more than 3,000 residences, 32 acres of parks and open spaces, restored wetlands, a new marina and 200,000 square feet of retail and commercial space. The Authority is working with the City of Oakland and nonprofit developer, MidPen, to develop the affordable housing portion of this larger development. A total of 465 affordable units (110 for seniors and



355 for families) will be built in four phases. The first two phases (110 senior units and 101 family units) have assembled all the financing required and construction will start December 2018.

- Empyrean Towers –OHA is working with a developer to convert a 99 unit severely distressed Single-room Occupancy hotel in downtown Oakland into 66 affordable studio and 1-bedroom apartments. This project continued to assemble the financing required during FY 2018 and construction will start in December 2018.
- 15<sup>th</sup> and Harrison Street – A development with 80-120 affordable rental units. This was in the predevelopment phase in FY 2018. OHA plans to self-develop this affordable housing project on a parking lot it owns in downtown Oakland.
- Foothill Family Apartments – OHA purchased the limited partner's interest in Foothill Family Apartments, L.P. the owner of a 65-unit affordable housing development.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* OHA will be revising the benchmarks per the request of HUD to reflect only the annual changes that have been completed instead of units that are in the construction pipeline as reflected below in HC#1 and HC#5.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>Standard HUD Metrics</b>				
<b>HC #1: Additional Units of Housing Made Available</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Housing units of this type prior to implementation of the activity = Zero (0)	Expected housing units of this type after implementation of the activity = 604 units under construction during the Fiscal Year	Actual housing units of this type after implementation of the activity = 59 units were completed and leased during the Fiscal Year	No. The benchmark was for units under construction and will be revise to project units to be completed. 59 units were completed and leased.
<b>HC #2: Units of Housing Preserved</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>

Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity = Zero (0)	Expected housing units preserved after implementation of the activity = 66 units rehabilitated	Actual housing units of this type after implementation of the activity = 51 units	No. 77% of the benchmark was achieved. Units substantially rehabbed were in the OAHPI portfolio.
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#### **HC #5: Increase in Resident Mobility**

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 670 households	Actual number of households able to move to a better unit after implementation of this activity = 110 units	No. The projected benchmarks previously reflected units under construction and will be revised to reflect units completed. 110 households were able to move to a better unit/neighborhood.

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

*Description of MTW Activity:* Establish site based wait lists at all public housing sites, HOPE VI sites, and developments with PBV allocations.

*Comparison of Outcomes to Baselines and Benchmarks:* Overall OHA saw mixed results with achieving a decrease in waitlist time due to site based waitlists. Many factors influence time spent on waitlists including low unit month vacancy rates and turnover of units. Oak Grove North and South are scheduled to undergo a major renovation and disposition and units are not being filled so that they can be renovated and used to house residents during renovation of their units, which affects waitlist times as applicants are not being pulled for vacancies. The error rate was determined using random file sampling as a result of an internal audit of specific waitlists.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing.

*Narrative Explanation of Challenges/New Strategies:* OHA has no challenges or new strategies to report.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* OHA has no changes or modifications to the metrics, baselines or benchmarks.

*Changes or Modifications to the Data Collection Methodology:* There were no changes to the data collection methodology to report.

<b>OHA and Standard Metrics</b>				
<b>CE #3: Decrease in Error Rate of Task Execution</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average error rate in completing a task as a percentage (decrease).	Number of errors in completing task prior to implementation = 10%	Expected average rate of errors in completing the task after implementation = 5%	Actual average rate of errors in completing the task = 3.9%	Yes.
<b>HC #3: Decrease in Wait List Time</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average applicant time on wait list in months (decrease).	Number of months applicants spent on centralized waitlist prior to implementation =60 months	Expected average number of months applicants spend on site based waitlist per site	Actual average number of months applicants spent on waitlist	No.
Campbell Village	60 months	48 months	71 months	
Lockwood Gardens	60 months	48 months	32 months	Yes
Peralta Villa	60 months	48 months	32 months	Yes
Harrison Towers	60 months	48 months	57 months	No
Adel Court	60 months	48 months	59 months	No
Oak Grove North	60 months	48 months	57 months	No
Oak Grove South	60 months	48 months	53 months	No
Palo Vista Gardens	60 months	48 months	21 months	Yes
Linden Court	60 months	48 months	56 months	No
Mandela Gateway	60 months	48 months	61 months	No

Chestnut Court	60 months	48 months	3 months	Yes
Foothill Family Apts	60 months	48 months	101 months	No
Lion Creek Crossing	60 months	48 months	28 months	Yes

***OHA Metric - Vacancy Rate per public housing site***

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average vacancy rate per public housing site (unit month average as a percentage)	Vacancy rate per site prior to implementation = 2%	Expected vacancy rate per site = 2%	Actual Vacancy rate per site (percentage)	
Campbell Village	2%	2%	1.32%	Yes
Lockwood Gardens	2%	2%	2.71%	No
Peralta Villa	2%	2%	1.29%	Yes
Harrison Towers	2%	2%	0.67%	Yes
Adel Court	2%	2%	1.11%	Yes
Oak Grove North	2%	2%	N/A sites designated for dispo	n/a
Oak Grove South	2%	2%	N/A sites designated for dispo	n/a
Palo Vista Gardens	2%	2%	1.54%	Yes
Linden Court	2%	2%	3.8%	No
Mandela Gateway	2%	2%	0.93%	Yes
Chestnut Court	2%	2%	0.79%	Yes
Foothill Family Apts	2%	2%	1.76%	Yes
Lion Creek Crossing	2%	2%		

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

*Description of MTW Activity:* Allocate PBV units to developments owned directly or indirectly by OHA without using a competitive process.

*Comparison of Outcomes to Baselines and Benchmarks:* OHA awarded 258 PBVs to the Brooklyn Basin project in support of developing 465 units of affordable housing as part of the

larger multi-phased project and 32 PBVs to the Empyrean Towers project. Empyrean is a conversion of a severely distressed SRO hotel in downtown Oakland into 66 affordable studios and 1 bedroom units.

*Status Update/Schedule:* Ongoing.

*Changes or Modifications to Activity:* OHA does not anticipate any changes or modifications to the activity in FY 2018.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* There are no changes to the metrics, baselines, and benchmarks included in the Standard HUD Metrics table below.

<b>Standard HUD Metrics</b>				
<b>CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$7,500 per RFP	Expected cost of task after implementation of the activity = \$0	Two projects were awarded PBV funding in FY 18 without competitive process, saving = \$15,000	Yes.
<b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 100 hours per RFP	Expected amount of total staff time dedicated to the task after implementation of the activity = 15 hours per RFP	Two projects were awarded PBV funding without competitive process in FY 18, saving = 170 hours of staff time	Yes.

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

*Description of MTW Activity:* Allocate PBV units to qualifying developments using the City of Oakland Notice of Funding Availability (NOFA)/ RFP or other existing competitive process.

*Comparison of Outcomes to Baselines and Benchmarks:* This activity was created to reduce the administrative time and development costs associated with issuing a RFP and to increase housing choices by creating new or replacement affordable housing opportunities. In FY 2018, The City offered a Notice of Funding Availability (NOFA)/RFP and OHA allocated PBV's to three projects, 3268 San Pablo, 50 PBV units; Fruitvale Transit Village, Phase IIB, 75 PBV units; and Fruitvale Studios, 12 PBV units.

*Status Update/Schedule:* This activity was active during the fiscal year and remains ongoing. This activity is dependent upon the number of projects that go through the City of Oakland Notice of Funding annual competitive process. With the State elimination of redevelopment funds to the City, fewer awards are being made currently by the City and the number of high quality new units being generated through this activity has slowed, but OHA monitors the City of Oakland RFP process for new opportunities.

*Narrative Explanation of Challenges/New Strategies:* OHA does not have challenges to report with this activity.

*Changes or Modifications to Metrics, Baselines or Benchmarks:* No changes were made to the metrics, baselines or benchmarks.

<b>Standard HUD Metrics CE #1: Agency Cost Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$7,500 per RFP	Expected cost of task after implementation of the activity = \$0	Three projects were awarded PBV funding without an OHA administered RFP = Cost savings of \$22,500	Yes. OHA saved \$22,500 and maintained a benchmark of zero expenditures.
<b>CE #2: Staff Time Savings</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 100 hours per RFP	Expected amount of total staff time dedicated to the task after implementation of the activity = 15 hours per RFP	Three projects were awarded PBV funding without an OHA administered RFP – spent 45 hours instead of 300	Yes. OHA spent 45 hours instead of 300 hours of staff time to complete the task.

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

Table 15 Approved MTW Activities Not Yet Implemented					
Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
13-01	2016	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> <li>Recent increases in income excluded in recertification</li> <li>Absolute minimum rent of \$25</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

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

*Description of MTW Activity:* Create a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where:

- Total Tenant Payment (TTP) calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households
  - Working seniors and working disabled individuals will have the option to choose to be included in the “work-eligible” group where their rent would be calculated based on 27% of their gross income and they would be on a biennial recertification schedule
- Triennial recertification schedule for senior and disabled households, biennial schedule for work-eligible households
- Eliminate all deductions (elderly/disabled deduction, dependent deduction, medical expenses, child care expenses) and earned income disallowance
- Increases in income within six months of recertification are excluded
- Absolute minimum rent of \$25. Households will still be eligible for a utility allowance. However, no rent will be reduced below the minimum rent due to a utility allowance
- Flat rent – In the Public Housing program, households will still have the option to choose a flat rent or the rent reform income-based rent calculation during initial eligibility or at the time of recertification

During the test phase of the pilot program, OHA will, at its discretion, withdraw components that are not working and/or move forward with implementing the policy for additional participants or properties based on the outcomes, after providing an opportunity for the public to comment on proposed changes. More details about this program and its components can be found in the FY 2013 MTW Annual Plan.



*Actions Taken Toward Implementation:* OHA worked with the business system vendor to develop a specification for a modification to allow biennial and triennial recertifications to be tracked and scheduled. OHA is currently waiting for the vendor to deliver the software modification so that it can be tested and implemented and the appropriate metrics for this activity can be tracked.

### C. Activities on Hold

Table 16 Approved MTW Activities on Hold					
Activity # and Fiscal Year Approved	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
10-07	2010	Disposition Relocation and Counseling Services	Provides counseling and relocation assistance to impacted public housing residents in developments approved for disposition.	-Provide incentives for families with children to become more economically self-sufficient  -Increase housing choices	Attachment D, Use of Funds
10-08	2011	Redesign FSS Program	Redesigns the FSS Program to incorporate best practices in the industry and encourage partnerships with community based programs and initiatives.	Provide incentives for families with children to become economically self-sufficient	Attachment C, Section E
10-09	2010	Waive 12 Month Minimum Stay Requirement in Converted PBV Units	Waives the 12 month minimum stay requirement for existing tenants in units that have converted to PBV assistance as the result of an approved disposition.	Increase housing choices	Attachment C, Section D.7
09-01 (merged with 17-01)	2011 (2018)	Alternative HQS System	Uses a risk-based strategy to allocate HQS inspection resources in order to improve compliance at problem properties and allocate fewer resources to properties with a history of compliance.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.5 Attachment D, Section D
09-02	2010	Short-Term Subsidy Program	Provides temporary housing assistance to preserve existing affordable housing resources and allow tenants to remain in-place.	Reduce costs and achieve greater cost effectiveness	Attachment D, Use of Funds

#### MTW Activity #10-07: Disposition Relocation and Counseling Services

*Description of MTW Activity:* Provide counseling and relocation assistance to residents impacted by an approved disposition of public housing units.

*Actions Taken Toward Reactivation:* OHA held this activity off-line due to the pending nature of the disposition application for the senior sites. No steps were taken to reactivate the activity

during FY 2018, but the activity will be reactivated if and when the application or a new disposition application is approved. OHA expects to reactivate this activity in FY 2019.

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

*Description of MTW Activity:* Redesign the Family Self Sufficiency (FSS) program building on best practices in the industry and, where applicable, working in tandem with other community-based programs and initiatives.

*Action Taken:* OHA reviewed the FSS program and updated the Action Plan but determined that none of the changes required MTW waivers to implement.

*Status Update:* On hold. OHA plans to reactivate in FY 2019.

*Reason Activity is on hold:* OHA recently updated its FSS Action Plan and none of the changes required MTW waivers to implement. OHA will continue to monitor FSS waivers implemented by other MTW housing authorities to determine if any are relevant and useful to OHA's FSS program.

#### **MTW Activity #10-09: Waive 12 Month Minimum Stay Requirement in Converted PBVs**

*Description of MTW Activity:* Waives the 12 month minimum stay requirement for existing tenants in units that have converted to PBV assistance as the result of an approved disposition. 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. This activity would allow residents that are in-place at the time of an approved disposition where the units are being converted to PBV assistance, to move at any time.

*Actions Taken Toward Reactivation:* No steps were taken toward reactivation of this activity during the fiscal year since this activity is used during a disposition or conversion processes. This activity will be reactivated when OHA conducts dispositions/conversion of public housing property which is projected for FY 2019.

#### **MTW Activity #09-01: Alternative HQS System (merged with #17-01)**

*Description of MTW Activity:* Develop an alternative inspection methodology and frequency for HQS inspections based on a risk assessment system and findings from prior inspections. Properties that are HQS compliant and pass their first inspection are only inspected every two years. Properties that fail on the first and second inspection remain on the annual inspection schedule. After two inspections that pass, the property may be placed back on an annual or biennial inspection schedule. Results of the inspections are submitted electronically to HUD via the HUD 50058 form and stored electronically in OHA's database.

*Actions Taken Toward Reactivation:* OHA plans to reactivate this activity as needed. OHA may use this activity to alter the inspection schedule as it relates to any new inspection protocols issued by HUD to increase or decrease the frequency of inspections based on inspection scoring and history. OHA would seek HUD review and approval prior to reactivating this activity with any significant changes.

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

*Description of MTW Activity:* Provide temporary subsidy funding to buildings 1) that were developed with assistance from the City of Oakland, 2) where there is a risk of an imminent threat of displacement of low income households, and 3) where it can be reasonably expected that providing short-term subsidy assistance will provide the necessary time to preserve the affordable housing resource.

*Actions Taken Toward Reactivation:* This activity remained on hold until applicable projects become available that would require use of this MTW authorization and OHA determines that funding is available. OHA wishes to keep the activity active to ensure the availability of the resource for future needs, particularly in light of the current escalating rental market and displacement from naturally occurring affordable housing units that is occurring in the City.

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

OHA does not have any closed out activities to report for FY 2018.

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

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### **A. MTW Report: Sources and Uses of Funding for the Fiscal Year**

#### **1) Actual Sources of MTW Funding for the Fiscal Year**

OHA submitted its unaudited financial information in the prescribed format in the Financial Assessment System on August 31, 2018.

#### **2) Actual Uses of MTW Funds in the Plan Year**

OHA shall submit unaudited and audited information in the prescribed FDS format through the FASPHA, or its successor system.

#### **3) Activities that Used Only the Single Fund Flexibility**

The single fund flexibility afforded by MTW allows OHA to plan and respond to the local needs of the community. OHA chose to allocate funding to several initiatives that support OHA goals and priorities of preserving and expanding affordable housing opportunities for residents of Oakland, ensuring OHA communities are safe and secure, and connecting the residents of OHA to resources and neighborhood services that promote economic stability and self-sufficiency.

The OHA activities and initiatives described below rely solely on the single fund flexibility and no other MTW waiver or authorization.

### **Fund Deferred Maintenance and Capital Improvements**

Decades of decreased capital funding and the following deferred maintenance have resulted in needs at OHA sites that far exceed the amount of funding that OHA receives. As a result, OHA used the single fund flexibility to provide supplemental funding and address capital improvement needs at its sites.

### **Fund Operations**

OHA uses the single fund flexibility to invest in and develop new affordable housing in high-opportunity districts, increase resident safety and security through community policing and create positive outcomes in the areas of education, job readiness and health and wellness. These all extend the impact of MTW beyond just housing.

OHA used the single fund budget to purchase the limited partner's interest in Foothill Family Apartments, L.P. which is a 65 unit affordable housing development consisting of a mix of public housing, project-based voucher and tax credit subsidized units and complete construction on Acts/Cyrene, adding 59 units of family housing and commercial space to the community. Predevelopment began on Phase 1 and 2 of Brooklyn Basin, which will add 110 senior and 101 family units of affordable housing as part of a large redevelopment of a 65 acre plot of land previously owned by the Port of Oakland

Supportive services above and beyond housing are part of OHA's vision to improve outcomes in all areas for families. The Department of Family and Community Partnerships (FCP) was created under single-fund flexibility and provides information and referral services and other family supportive services to households served by OHA. FCP is in the third year of the Jobs Plus Grant, a four year grant awarded in December 2015, to facilitate employment for public housing residents across five developments in West Oakland. Over 300 residents have been enrolled and Community Coaches worked approximately 30 hours a week supporting and recruiting enrollees. Multiple recruiting events and a Job Club were created to foster partnerships with employers. OHA has hired additional case management staff to supplement the job development services for the grant enrollees in addition to funding supportive services. While this workforce development initiative and West Oakland team have been created in response to the Jobs Plus grant, FCP offers job development services to all residents, regardless of location. Through MTW flexibilities, OHA continues to expand the impact of client services offered both in-house and in partnership with community-based service providers for both Public Housing and HCV residents.

In FY 2018, FCP continued leveraging partnerships to improve education outcomes for school-aged children through OHA's Education Initiative. Through the single fund budget, OHA's Promise Plus program in partnership with the Oakland Unified School District focused on mitigating chronic absenteeism and improving academic achievement among OHA children. OHA provides Education Ambassadors to seven partner schools to promote attendance programming and parent engagement in support of education achievement and attendance goals. The West Oakland Middle school saw attendance increase from 92% to 97% in FY 2018. FCP serves the health and wellness needs of OHA's families through partnerships with Samuel Merritt University nursing students who provide health and wellness screenings and partnerships with St. Mary's Center who offer health education and comprehensive medical, behavioral, and oral health services to children 18 and under regardless of insurance. The "Still Active Seniors" program helps seniors with weekly fitness activities in addition to the wellness checks. Through our partnership with the West Oakland Health Council, the FCP department has been able to provide on-site Cal-fresh and Medi-Cal application renewals and referrals for dental screenings and follow-up treatment. OHA supported 217 youth through summer employment opportunities, helped 56 residents enroll in college and 14 residents enroll to obtain a GED. These partnerships have allowed for increased supportive services for our senior population.

OHA continues to participate in a demonstration testing the effectiveness of combining housing choice vouchers for eligible youth (ages 18-24) lacking adequate housing under the Family Unification Program (FUP) with assistance under the FSS program and enrolled two residents during FY 2018 in the demonstration. This opportunity directly benefits youth by giving them more time in a stable housing environment to achieve their education & employment goals and to assist in their efforts to become self-sufficient. An orientation was held for all FUP participants, as well as individual case management meetings to provide needs assessments, education, employment, and housing search assistance. FCP also holds bi-monthly meetings with Alameda County Social Services and Beyond Emancipation to effectively coordinate services on behalf of the FUP participants and will continue to collaborate with other community based organizations to provide services for this demonstration.

Building resident capacity is critical to OHA's vision, and OHA utilizes MTW flexibility to provide a level of support beyond housing to enhance resident educational, health and wellbeing outcomes. Using subject matter expert partners, FCP added a Baby Play Group held at Lockwood Gardens in partnership with Safe Passages, geared for parents with babies aged "0-

12” months and covers the following learning components: Child Development, Positive Parenting and Attachment, Social-Emotional Development, Early Literacy and more. In partnership with the Alameda County Public Health Department, FCP hosted the “Food as Medicine” program where residents learned about the importance of cooking with whole grains and vegetables and other healthy food choices. The Alameda County Public Health Department also offers a Safe Handling and Food Preparation program where residents can learn proper food handling and receive their Serv Safe Food Handler certification for employment opportunities.

Through partnerships with Imperfect Foods, Semi-Freddi’s Bakery and Mandela Marketplace, the FCP Department hosts a monthly food distribution at our multi-family housing developments. Residents are able to receive free bread, vegetables, boxed and canned goods and shop for low-cost organic fruits and vegetables and OHA supports approximately 75 families per month. The FCP Department continues to seek out service organizations to support our families in all facets of their lives.

Despite the low-inventory and cost of housing in the Bay Area, the homeownership program remains of great interest to our residents as evidenced by the 200+ individuals on our interest list. A total of 113 homes have been purchased since inception with one purchased this year. The majority of these individuals are enrolled in the Family Self-Sufficiency Program in an effort to prepare for homeownership as it provides financial literacy which includes credit and income building as well as an escrow savings account that is often used to assist with housing down payment and closing costs.

It is of critical importance to OHA’s management strategies to provide consistent and effective security to residents, through both physical design and law enforcement. Activities by the Oakland Housing Authority Police Department (OHAPD) are funded exclusively through the single-fund flexibility. OHAPD’s commitment to community policing and crime prevention helps reduce crime and violence, which makes properties and the community at large safer by providing a variety of Crime Prevention programs and youth activities and helps with a quicker response to requests from residents by offloading crime response from the overburdened Oakland Police Department.



In FY 2018, OHAPD conducted 21 summer youth events, a Holiday Giveaway where 1,200 children received toys and participated in a holiday party, a pancake breakfast, Mother’s Day barbeque, as well as other community building activities, which enable the police and residents to interact and build trust, recognition and relationships. OHAPD is one of very few law enforcement entities that are nationally accredited by the Commission on Accreditation for Law enforcement Agencies Inc. and OHAPD received reaccredited status for both law enforcement and communications in FY 2018. To date, OHAPD has been the recipient of 16 NAHRO awards most recently for the “Winter Wonderland Toy Giveaway.”

OHAPD contributes to resident development of leadership and career exploration by having sixteen (16) public housing and HCV residents participate in the Police Explorer Program, which was established to provide youth ages 18 to 21 an opportunity to work within a police

department, or other Authority departments. The goal of this program is to enhance the relationship between young adults in our communities, members of law enforcement, OHA staff, and to provide job skills for young adults in order for them to ultimately compete for positions at OHA or other public or private entities. The use of technology to achieve the goals and objectives is a priority for OHAPD and the department plans to deploy additional security cameras at several large housing developments to increase safety and help solve and prevent criminal activity. In addition, the incorporation of a central monitoring station to monitor video generated by these cameras via a “Virtual Volunteer Patrol” concept is being developed and deployed.



**Table 17: Describe Actual Use of MTW Single Fund Flexibility**

SDHC uses MTW single fund flexibility to implement and operate programs for HCV and Public Housing program participants.

OHA uses the single fund flexibility to invest in and develop new affordable housing in high-opportunity districts, increase resident safety and security through community policing and create positive outcomes in the areas of education, job readiness and health and wellness. These all extend the impact of MTW beyond just housing.

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## B. MTW Report: Local Asset Management Plan

OHA did not implement a local asset management plan during FY 2018.

Table 18: Local Asset Management Plan

i. Did the MTW PHA allocate costs within statute in the Plan Year?

Yes

ii. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan

No

iii. Did the MTW PHA provide a LAMP in the appendix?

No

iv. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.

## **Section VI. Administrative**

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### **A. General description of any HUD reviews, audits, or physical inspection issues that require the agency to take action to address the issue**

There are no items to report under this section.

### **B. Results of the Latest Agency-directed Evaluations of the Demonstration**

There are no items to report under this section.

### **C. Certification from the Board of Commissioners**

## **Appendices**

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- Appendix A. Board Resolution
- Appendix B. Project-Based Voucher Allocations
- Appendix C. Overview of Other Housing
- Appendix D. Affordable Housing Development Activities by Unit Type
- Appendix E. MTW & Non-MTW Housing Stock
- Appendix F. Waitlist Demographic Data
- Appendix G. Glossary of Acronyms

## **APPENDIX A**

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### **Board Resolution**

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

On Motion of Commissioner: Vice-Chair Marlene Hurd

Seconded by Commissioner: Commissioner Donna Griggs-Murphy

And approved by the following vote:

AYES: Commissioners Hurd, Hartwig, Griggs-Murphy, Montgomery, Griffith, Castillo, Jung-Lee

NAYS: 0

ABSTAIN: 0

EXCUSED: 0

ABSENT: 0

**THE FOLLOWING RESOLUTION WAS ADOPTED:**

**NUMBER: 4836**

**RESOLUTION ACCEPTING THE FISCAL YEAR 2018 MOVING TO  
WORK ANNUAL REPORT AND CERTIFICATION OF COMPLIANCE**

WHEREAS, the Moving to Work (MTW) Agreement requires the Oakland Housing Authority Board of Commissioners to submit to the U.S. Department of Housing and Urban Development (HUD) a MTW Annual Report for each fiscal year in which it submits a MTW Annual Plan; and

WHEREAS, the Oakland Housing Authority adopted the Fiscal Year (FY) 2018 MTW Annual Plan on April 3, 2017; and

WHEREAS, the FY 2018 MTW Annual Report provides HUD, OHA residents and community stakeholders with the information necessary to compare OHA's performance during the past fiscal year to the expectations OHA set for itself at the beginning of the fiscal year in its FY 2018 Annual Plan; and

WHEREAS, the Board of Commissioners certifies that the Oakland Housing Authority has met the three statutory requirements of:

- 1) Assuring that at least 75 percent of the families assisted by the Agency are very low-income families; and
- 2) Continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and

- 3) Maintaining a comparable mix of families (by family size), as would have been provided had the amounts not been used under the demonstration; and

WHEREAS, the FY 2018 MTW Annual Report is in compliance with all HUD regulations and requirements;

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

THAT, the Board of Commissioners accepts the Oakland Housing Authority FY 2018 MTW Annual Report; and

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

THAT, the Executive Director, on behalf of the Authority, is hereby authorized to submit the FY 2018 MTW Annual Report and Certification of Compliance to the U.S. Department of Housing and Urban Development and to take all actions necessary to implement the foregoing resolution.

*I certify that the foregoing resolution is a full, true and  
correct copy of a resolution passed by the  
Commissioners of the Housing Authority  
of the City of Oakland, California on September 24, 2018*

  
Eric Johnson, Secretary/Executive Director

**ADOPTED: September 24, 2018**

**RESOLUTION NO. 4836**



## CERTIFICATIONS OF COMPLIANCE

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

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

Acting on behalf of the Board of Commissioners of the Moving to Work Public Housing Agency (MTW PHA) listed below, as its Chairman or other authorized MTW PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the MTW PHA Plan Year beginning (07/01/2017), hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

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

accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.

- (14) The MTW PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
- (15) The MTW PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
- (16) The MTW PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the MTW PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.
- (17) With respect to public housing and applicable local, non-traditional development the MTW PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
- (18) The MTW PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
- (19) The MTW PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
- (20) The MTW PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 200.
- (21) The MTW PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
- (22) All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the MTW PHA in its Plan and will continue to be made available at least at the primary business office of the MTW PHA.

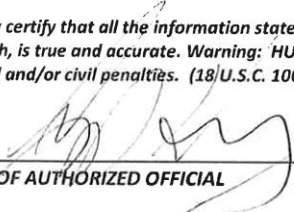
OAKLAND HOUSING AUTHORITY

MTW PHA NAME

CA-003

MTW PHA NUMBER/HA CODE

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

  
NAME OF AUTHORIZED OFFICIAL

Commissioner chair  
TITLE

Gregory D. Hartwig

SIGNATURE

24 September 2018  
DATE

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

## **APPENDIX B**

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### **Project-Based Voucher Allocations**

Project-Based Voucher Allocations as of June 30, 2018				
Development Name	Date of Board Approval	# of PBV Units	Contract Date	Population Served
<b>HAP contracts</b>				
Mandela Gateway	2/12/2003	30	10/20/2004	Low Income Families
Altenheim Senior Housing Phase I	7/13/2005	23	1/1/2007	Senior
Lion Creek Crossings II	11/9/2005	18	7/3/2007	Low Income Families
Madison Apartments	7/13/2005	19	4/25/2008	Low Income Families
Lion Creek Crossings III	6/14/2006	16	6/25/2008	Low Income Families
Seven Directions	7/13/2005	18	9/12/2008	Low Income Families
Orchards on Foothill	6/14/2006	64	11/7/2008	Senior
Fox Courts / Uptown Oakland	12/3/2004	20	5/15/2009	Low Income Families / Homeless with HIV/AIDS
Jack London Gateway - Phase II	2/26/2007	60	6/5/2009	Senior
14 <sup>th</sup> St. Apartments at Central Station	1/22/2007	20	11/25/2009	Low Income Families
Tassafaronga Village Phase I	2/25/2008	80	4/23/2010	Low Income Families
Altenheim Senior Housing Phase II	4/28/2008	40	4/5/2010	Senior
Fairmount Apartments	10/24/2008	16	3/8/2010	Low Income Families / Persons with Disabilities
Tassafaronga Village Phase II	7/21/2008	19	5/27/2010	Low Income Families / Homeless with HIV/AIDS
*Harp Plaza (19)	5/24/2010	18	8/1/2010	Low Income Families
*Effie's House (10)	5/4/2009	7	8/1/2010	Low Income Families
*Drachma Housing (14)	5/4/2009	11	12/1/2010	Low Income Families / Mod Rehab Conversion
Foothill Family Partners	6/28/2010	11	8/1/2011	Low Income Families
St. Joseph's Senior Apts	5/29/2007	83	8/22/2011	Senior
*OHA Scattered Sites (1539)	7/27/2009	780	In Progress	Low Income Families / Public Housing Disposition
Lion Creek Crossings IV	4/28/2008	10	1/13/2012	Low Income Families
Savoy Phase 1	6/28/2010	55	2/14/2012	Special Needs
*Hugh Taylor house (35)	6/11/2011	32	5/8/2012	Low Income Families / Mod Rehab Conversion
*Madison Park (96)	6/11/2011	50	6/7/2012	Low Income Families / Mod Rehab Conversion
Merritt Crossing Apts (6 <sup>th</sup> and Oak)	5/4/2009	50	6/27/2012	Senior
720 E 11 <sup>th</sup> Street Apts (aka Clinton Commons)	4/28/2008	16	10/2/2012	Low Income Families / Homeless with HIV/AIDS
Harrison Street Senior Housing	4/23/2007	11	11/15/2012	Senior
Kenneth Henry Court	4/11/2011	13	2/8/2013	Low Income Families
California Hotel Phases 1 and 2	2/28/2011	88	3/1/2013	Special Needs / Homeless / HIV/AIDS
James Lee Court	10/25/2010	12	3/21/2013	Low Income Families
Savoy Phase 2	6/28/2010	46	3/29/2013	Special Needs / Homeless / HIV/AIDS
Slim Jenkins Court	5/4/2009	11	5/8/2013	Low Income Families
Oak Point Limited (OPLP)	10/25/2010	15	5/30/2013	Low Income Families
Drasnin Manor	10/25/2010	25	6/27/2013	Low Income Families
St. Joseph's Family Apts	10/25/2010	15	12/3/2013	Low Income Families
MacArthur Apts	10/25/2010	14	10/13/2013	Low Income Families
California Hotel Phase 3	2/28/2012	47	11/22/2013	Special Needs / Homeless / HIV/AIDS
Lion Creek Crossings V	10/17/2011	127	8/11/2014	Senior
Cathedral Gardens	5/23/2011	43	10/27/2014	Low Income Families
Lakeside Senior Apartments	1/23/2012	91	1/26/2015	Senior
Marcus Garvey Commons	4/11/2011	10	3/17/2015	Low Income Families
1701 Martin Luther King Jr. Way	5/20/2013	25	12/7/2015	Special Needs / Homeless / HIV/AIDS

MURAL aka MacArthur Transit Village	2/28/2011	22	1/20/2016	Low Income Families
AveVista aka 460 Grand	3/16/2010	34	1/27/2016	Low Income Families
11th and Jackson (Prosperity Place)	11/30/2010	35	2/1/2017	Low Income Families
Fox Court Apts. (13)	12/5/2016	13	9/15/2017	Low Income Families
Ambassador Apts.(10)	12/5/2016	10	9/1/2017	Low Income Families
Seven Directions (10 additional vouchers)	12/5/2016	10	12/1/2017	Low Income Families
Adeline Street Lofts	12/5/2016	20	3/1/2018	Low Income Families
Rosa Park	12/5/2016	11	2/1/2018	Low income and homeless individuals
Madsion Apts (additional vouchers)	12/5/2016	31	6/9/2018	Low Income Families
Stanley Avenue Lofts	12/5/2016	13	6/1/2018	Low Income Families
Swan Market	12/5/2016	10	12/1/2017	Low Income Families
San Pablo Hotel	12/5/2016	31	2/19/2018	Low Income Seniors
Hisman Hin-Nu Apts	12/5/2016	10	12/15/2017	Low Income Families
Oak Park Apts	12/5/2016	10	12/15/2017	Low Income Families
94th and International (Acts Cyrene)	10/17/2011	14	12/29/2017	Low Income Families
<b>Units under HAP Contract</b>		<b>2,433</b>		
<b>Conversion Projects</b>				
*Harp Plaza (19)	5/24/2010	1	8/1/2010	Low Income Families
*Effie's House (10)	5/4/2009	3	8/1/2010	Low Income Families
*Drachma Housing (14)	5/4/2009	3	12/1/2010	Low Income Families / Mod Rehab Conversion
*OHA Scattered Sites (1539)	7/27/2009	759	In Progress	Low Income Families / Public Housing Disposition
** OHA Senior Disposition Sites	10/16/2017	((253))	Application	Public Housing Disposition
*Hugh Taylor house (35)	6/11/2011	3	5/8/2012	Low Income Families /Mod Rehab Conversion
*Madison Park (96)	6/11/2011	46	6/7/2012	Low Income Families /Mod Rehab Conversion
<b>Units under HAP that will convert to PBV at turnover*</b>		<b>815</b>		
<b>AHAP Contracts</b>				
Civic Center TOD	7/22/2014	10	in development	Special Needs / Homeless
Additional vouchers awarded	2/26/2018	10		
Redwood Hill Townhomes	6/1/2015	11	in development	Low Income Families/Special Needs
Additional vouchers awarded	5/23/2016	16		
3706 San Pablo Avenue	6/1/2015	10	in development	Low Income Families
Additional vouchers awarded	5/23/2016	5		
Additional vouchers awarded	5/22/2017	5		
Camino 23	5/23/2016	26	6/15/2018	Low Income Families/Special Needs
Embark Apartments	5/23/2016	61	11/28/2017	Affordable Housing for Veterans / VASH (31)
Fruitvale Transit Village - Phase IIA	5/23/2016	66	in development	Low Income Families/VASH (20)
<b>Units under AHAP Contract</b>		<b>220</b>		

<b>Conditional Awards</b>				
Coliseum Place	5/23/2016	37	pending	Low Income Families/Special Needs
Empyrean	10/24/2016	32	pending	Low Income Families
Courtyards at Acorn	12/5/2016	30	pending	Low Income Families
The Town Center	12/5/2016	50	pending	Low Income Families
Bishop Roy C. Nicholas	12/5/2016	17	pending	Low Income Seniors
Sylvester Rutledge Manor	12/5/2016	64	pending	Low Income Seniors
Hamilton Apts	12/5/2016	92	pending	Low income and homeless individuals
Drachma Housing	12/5/2016	11	pending	Low Income Seniors
International Blvd Apts	12/5/2016	18	pending	Low Income Families
Northgate Apts	12/5/2016	14	pending	Low Income Families
Brooklyn Basin	2/1/2018	258	pending	Seniors and Low income Families
Oak Street Apts	12/5/2016	25	pending	Low Income Seniors
Westlake Christian Terrace West	2/27/2017	121	pending	Low Income Seniors
Kenneth Henry Court	2/27/2017	15	pending	Low Income Families
Eastside Arts & Housing	2/27/2017	10	pending	Low Income Families
Fruitvale Studios	6/25/2018	12	pending	formerly homeless and special needs
Fruitvale Transit Village Phase IIB	6/25/2018	82	pending	families and seniors
3268 San Pablo	6/25/2018	25	pending	formerly homeless and veterans
<b>Units with conditional award</b>		<b>913</b>		
<b>Disposition Pending and NOFA Invitations</b>				
OHA Senior Disposition Sites	10/16/2017	253	pending TPV app	Public Housing Disposition
Aurora Apartments	7/23/2018	43	pending	special needs
7th and Campbell	7/23/2018	20	pending	formerly homeless
3801 MLK Family Housing	7/23/2018	16	pending	families and special needs
W Grand and Brush	7/23/2018	28	pending	formerly homeless
Nova Apartments	7/23/2018	29	pending	formerly homeless
34th and San Pablo	7/23/2018	25	pending	Low income families
9th Avenue	7/23/2018	7	pending	low income families
		<b>421</b>		
<b>Total PBV Units Allocated</b>		<b>3,566</b>	4,802	includes projected awards

\* Conversion to PBV ongoing as units are currently occupied by HCV-assisted family

## APPENDIX C

### Overview of Other Housing

Overview of Other Housing						
	Total Unit Count - All Tax Credit Units	Subsidy Layering - Public Housing	Subsidy Layering - Project Based Voucher	Tax Credit Only *	Other HUD Funding	Unsubsidized Units
<b>HOPE VI Sites</b>						
Chestnut Court	72	45		11		1
Linden Court	79	38		12		1
Mandela Gateway	168	46	30	36		2
Foothill Family Apartments	65	21	11	12		0
Lion Creek Crossings - Phases 1 - 5	567	157	171	153		5
<b>Other Mixed Developments</b>						
Tassafaronga Village - Phases 1 and 2	157		99	45		2
Cathedral Gardens	100		43	55		1
Keller	201			166	157	33
Harrison Senior	73		11	61	62	1
Lakeside Senior Apts.	92		91			1
Prosperity Place	71		35	36	8	
ACTS/CYRENE	59		14	44		1
AveVista	68		34	30		1
<b>Total Units</b>	<b>1772</b>	<b>307</b>	<b>539</b>	<b>661</b>	<b>219</b>	<b>49</b>



## APPENDIX D

### Affordable Housing Development Activities

Affordable Housing Development Activities by Unit Type						
	FY 2018 Outcomes Non-traditional Units	FY 2018 Outcomes Traditional Units	Total Units	Public Housing	Project- Based Vouchers	Tax Credit Only
<b>PREDEVELOPMENT</b>						
Brooklyn Basin	207	258	465	0	258	203
15th and Harrison	<u>62</u>	<u>11</u>	<u>73</u>	<u>0</u>	<u>11</u>	<u>62</u>
<i>Total in Predevelopment</i>	207	269	583	0	269	265
<b>UNDER CONSTRUCTION</b>						
Empyrean Towers	<u>33</u>	<u>32</u>	<u>66</u>	<u>0</u>	<u>32</u>	<u>33</u>
<i>Total Under Construction</i>	79	46	125	0	46	78
<b>PLACED IN SERVICE</b>						
94th and International	45	14	59	0	14	44
<i>Total Placed in Service</i>	45	14	59	0	14	44
<b>REHABILITATION</b>						
OAHP	0	TBD	1,539	0	1,539	0
Oak Groves	<u>0</u>	<u>0</u>	<u>152</u>	<u>152</u>	<u>0</u>	<u>0</u>
<i>Total Rehabilitation</i>	0	59	1,691	152	1,539	0
<b>COMBINED TOTAL</b>	<b>331</b>	<b>388</b>	<b>2,458</b>	<b>152</b>	<b>1,868</b>	<b>387</b>

## **APPENDIX E**

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### **MTW and Non-MTW Housing Stock**

FY 2018 MTW Housing Inventory MTW and Non-MTW housing stock		
		End of FY 2018
<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>		
	Harrison Towers	101
	Adel Court	30
	Oak Grove North	77
	Oak Grove South	75
	Palo Vista Gardens	<u>100</u>
		383
<b>HOPE VI Sites*</b>		
	Linden Court	38
	Mandela Gateway	46
	Chestnut Court	45
	Foothill Family Apts.	21
	Lion Creek Crossings Phase 1	45
	Lion Creek Crossings Phase 2	54
	Lion Creek Crossings Phase 3	37
	Lion Creek Crossings Phase 4	<u>21</u>
		307
	<b>TOTAL PUBLIC HOUSING</b>	<b>1,606</b>
<b>VOUCHER PROGRAM</b>		
<b>MTW</b>		
	General MTW HCV	12,866
<b>Non -MTW</b>		
	VASH	396
	Section 8 Mod Rehab	251
	Section 8 Mainstream	175
	FUP	50
	NED	65
	Tenant Protection Vouchers	No new allocations in the 12 months
	Shelter plus Care (S+C)	331
<b>TOTAL</b>		<b>15,740</b>

## **APPENDIX F**

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### **Waitlist Demographic Data**

### Voucher Programs Waitlist Demographic Information

	Count	% of Total
Total HH on Wait List	36,951	100.0%
Family Type Based on HoH	0	
Elderly (≥ 62 years old)	6,145	16.6%
Elderly Disabled	2,327	6.3%
Elderly Non-Disabled	5,268	14.3%
Disabled (< 62 years old)	3,877	10.5%
Family	18,109	49.0%
Total	35,726	96.7%
Age of All HH Members		
0 - 5 years old	2,243	9.1%
6 - 12 years old	2,338	9.5%
13 - 17 years old	1,228	5.0%
18 - 24 years old	3,477	14.1%
25 - 55 years old	7,806	31.7%
56 - 61 years old	3,536	14.3%
≥ 62 years old	4,020	16.3%
Total	24,648	100.0%
Race Based on HoH		
White	1,369	3.7%
Black/African American	10,369	28.1%
American Indian/Alaskan	205	0.6%
Native	4,632	12.5%
Asian	154	0.4%
Native Hawaiian/Other	154	0.4%
Pacific Islander	1,063	2.9%
More than 1 Race and/or	14,425	39.0%
Other	32,217	87.2%
Total	32,217	87.2%
Ethnicity Based on HoH		
Hispanic	1,532	4.1%
Non-Hispanic	12,279	33.2%
Not Reported	6,400	17.3%
Total	20,211	54.7%
HH Size by Income Group	Percent of Area Median Income	
	0% - 30%	31% - 50%
1 Person HH	8626	1278
2 Person HH	6177	1043
3 Person HH	2879	606
4 Person HH	1474	228
5 Person HH	519	104
6+ Person HH	303	75
Total	19,978	3,334
%	54.1%	9.0%

	Count	% of Total
Gender of HoH		
Female	9772	26.4%
Male	5928	16.0%
Total	15700	42.5%
HH by Unit Size	0	
0 BD (Studio)	1627	4.4%
1 BD	13325	36.1%
2 BD	10302	27.9%
3 BD	3310	9.0%
4 BD	100	0.3%
5 BD	4	0.0%
6 BD	0	0.0%
Total	28,668	77.6%
Average HH Size	2.02	

\*Not available for OAHPI or HCV waitlists.

HoH = Head of Household

HH = Household

# Public Housing Waitlist Demographic Information

	Count	% of Total
Total HH on Wait List	3147	100.0%
Family Type Based on HoH		
Elderly (≥ 62 years old)	661	21.0%
Elderly Disabled	89	2.8%
Elderly Non-Disabled	1,472	46.8%
Disabled (< 62 years old)	72	2.3%
Family	849	27.0%
Total	3,143	100.0%
Age of All HH Members		
0 - 5 years old	129	4.1%
6 - 12 years old	298	9.5%
13 - 17 years old	192	6.1%
18 - 24 years old	31	1.0%
25 - 55 years old	513	16.3%
56 - 61 years old	129	4.1%
≥ 62 years old	1,848	58.9%
Total	3,140	100.0%
Race Based on HoH		
White	251	8.0%
Black/African American	1,110	35.3%
American Indian/Alaskan Native	28	0.9%
Asian	1,512	48.0%
Native Hawaiian/Other Pacific Islander	40	1.3%
More than 1 Race and/or Other	77	2.4%
Not Reported	129	4.1%
Total	3,147	100.0%
Ethnicity Based on HoH		
Hispanic	118	3.7%
Non-Hispanic	2,060	65.5%
Not Reported	411	13.1%
Total	2,589	82.3%
HH Size by Income Group	Percent of Area Median Income	
	0% - 30%	31% - 50%
1 Person HH	1879	59
2 Person HH	598	31
3 Person HH	250	15
4 Person HH	66	7
5 Person HH	9	2
6+ Person HH	21	2
Total	2,823	116
%	89.7%	3.7%

	Count	% of Total
Gender of HoH		
Female	1234	39.2%
Male	1148	36.5%
Total	2382	75.7%
HH by Unit Size		
0 BD (Studio)	0	0.0%
1 BD	1,846	58.7%
2 BD	519	16.5%
3 BD	244	7.8%
4 BD	35	1.1%
5 BD	3	0.1%
6 BD	1	0.0%
Total	2,648	84.1%
Average HH Size	1.54	

\*Not available for Lockwood or Peralta Village.

HoH = Head of Household

HH = Household

## **APPENDIX G**

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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.

**ASCO** – Alameda County Sheriff's Office

**BB** – Building Bridges Initiative

**BBSRO** – Building Bridges Single Room Occupancy program

**BBTHP+** - Building Bridges Transitional Housing Program Plus

**BBCalWORKs** – Building Bridges CalWORKs program

**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.

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

**FPFY** – First Place for Youth (vendor for BBTHP+)

**FSS** – Family Self-Sufficiency. A program operated by a PHA to promote self-sufficiency of families in the Section 8 and Public Housing programs.

**FY** – Fiscal Year. A 12-month period used for budgeting and used to distinguish a budget or fiscal year from a calendar year. OHA's fiscal year runs from July 1 through June 30.

**FYE** – Fiscal Year End. OHA's fiscal year end is June 30.

**HAP** – Housing Assistance Payment. The monthly payment by a PHA to a property owner to subsidize a family's rent payment.

**HCV** – Housing Choice Voucher. Sometimes referred to as a Section 8 voucher or tenant-based voucher, the voucher provides assistance to a family so that they can rent an apartment in the private rental market.

**HOPE VI** – Housing Opportunities for People Everywhere. A national HUD program designed to rebuild severely distressed public housing. The program was originally funded in 1993.

**HQS** – Housing Quality Standards. The minimum standard that a unit must meet in order to be eligible for funding under the Section 8 program.

**HUD** – United States Department of Housing and Urban Development. The Federal government agency responsible for funding and regulating local public housing authorities.

**LHAP** – Local Housing Assistance Programs. Under this MTW Activity, OHA has developed local housing programs that provide support to households that might not qualify for or be successful in the traditional Public Housing and/or Section 8 programs.

**Mod Rehab** – Moderate Rehabilitation. The Section 8 Moderate Rehabilitation program provides project-based rental assistance for low income families. Assistance is limited to properties previously rehabilitated pursuant to a HAP contract between an owner and a PHA.

**MOMS** – Maximizing Opportunities for Mothers to Succeed. A partnership between OHA and the Alameda County Sheriffs Department. The program provides 11 units of service enriched housing for women leaving the county jail system and reuniting with their children.

**MTW** – Moving to Work. A national demonstration program for high performing public housing authorities. OHA has named its MTW program “Making Transitions Work”.

**NED** – Non-Elderly Disabled vouchers. This is a voucher program that provides subsidies to families where the head of household or a family member is disabled but not a senior citizen.

**NOFA** – Notice of Funding Availability. As part of a grant process, NOFAs are issued to dictate the format and content of proposals received in response to funding availability.

**OHA** – Oakland Housing Authority.

**PACT** – Parents And Children Together. A partnership between OHA and the Alameda County Sheriff’s Office. The PACT site provides service enriched housing for women and men leaving the county jail system and reuniting with their children who are participating in the MOMs and DADs program.

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

**REAC** – Real Estate Assessment Center. A HUD department with the mission of providing and promoting the effective use of accurate, timely and reliable information assessing the condition of HUD's portfolio; providing information to help ensure safe, decent and affordable housing; and restoring the public trust by identifying fraud, abuse and waste of HUD resources.

**RFP** – Request for Proposals. As part of a procurement or grant process, RFPs are issued to dictate the format and content of proposals received in response to funding availability.

**RFQ** – Request for Qualifications. As part of a procurement or grant process, RFQs are issued to dictate the format and content of proposals received in response to funding availability.

**RHF** – Replacement Housing Factor. These are Capital Fund Grants that are awarded to PHAs that have removed units from their inventory for the sole purpose of developing new public housing units.

**SNHAP** – Special Needs Housing Assistance Programs

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

**SSA** – Alameda County Social Services Agency

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

**TPV** – Tenant Protection Voucher. A voucher issued to families displaced due to an approved demolition/disposition request, natural disaster, or other circumstance as determined by HUD. The vouchers provide families with tenant-based rental assistance that they can use in the private rental market.

**VASH** – Veterans Affairs Supportive Housing. This HUD program combines tenant-based rental assistance for homeless veterans with case management and clinical services provided by the Department of Veteran's Affairs at their medical centers and community-based outreach clinics.