

Making Transitions Work



Annual Report FISCAL YEAR 2015 (July 1-2014 - June 30, 2015)

Submitted on September 30, 2015



Oakland Housing
Authority

www.oakha.org

Oakland Housing Authority

Fiscal Year 2015 MTW Annual Report

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Oakland Housing Authority
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Section I. Introduction

The Oakland Housing Authority (OHA), established in 1938 to assure the availability of quality housing for low-income persons, is pleased to release its Fiscal Year (FY) 2015 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. Through MTW flexibility which waives certain provisions of the Housing Act of 1937 and HUD's subsequent regulations, OHA uses this opportunity to tailor its programs to address specific and local market conditions and needs of residents of the City of Oakland. OHA chose to rename the program to "Making Transition Work" to better capture 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.

While OHA entered into an Amended and Restated Moving to Work Demonstration Agreement (the "Agreement") with HUD on February 4, 2009, the Agreement expires in FY 2018. A specific requirement of the Agreement is that OHA must complete a MTW Annual Report and highlight specific information regarding the activities conducted during the fiscal year. OHA's MTW Annual Report provides HUD, OHA residents, and the public, baseline information on OHA programs and MTW budget, and an analysis of changes that occurred during the period between July 1, 2014 and June 30, 2015. OHA in conjunction with the other 39 program participants, is working diligently to negotiate terms for a new Agreement with HUD to preserve and extend the MTW program for the next decade, and maintain the innovative changes and capabilities that have been pioneered. The details included in this document will reflect that due to the uncertainty of ongoing negotiations and changes being proposed for a new contract and Agreement, OHA has not been able to pursue certain new activities with the speed and depth as originally envisioned.

Overview of the Agency's Goals and Objectives for FY 2015

OHA started FY 2015 with goals that focused on streamlining operations through administrative efficiencies and improvements to key business systems. In FY 2015, staff successfully launched a new financial and business management system, encompassing all of OHA's core functions and continued substantial renovations on a new administrative office site, destined to house OHA's largest and most customer facing department, Leased Housing. Complexities in a large-scale system conversion have delayed implementation of some of the newer activities, but planning has continued to expedite implementation of these activities going forward. During FY 2015, the Oakland and surrounding Bay Area real estate market exploded and led the nation in high rents and rent increases. These conditions caused low inventory, which has meant increased challenges to maintain our historically high Section 8 utilization rates, with more landlords choosing to opt for private market tenants. Ongoing funding

challenges, continue to incite creativity and innovative solutions for leveraging the ever decreasing Federal dollar. Despite these hurdles, OHA continues its commitment to increase housing choice in high opportunity areas, maintain and improve our housing stock and pursue strategic new community partnerships for homeless and other hard to house populations. The MTW flexibility also allows OHA to establish partnerships while still maintaining our existing relationships and focus in the Education and Employment development arenas.

As a requisite to program participation, all MTW activities must meet at least one or more of the following statutory goals:

- Reduce costs and achieve greater cost effectiveness in Federal expenditures;
- Give incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs, that assist in obtaining employment and becoming economically self-sufficient; and
- Increase housing choices for low-income families.

The details describing the progress OHA made toward implementing 12 of the 23 approved activities and continuing to reach over 15,000 low-income families in Oakland in FY 2015 are included in Section IV.

The FY 2015 MTW Annual Plan and Report are available on OHA's website at www.oakha.org.

Section II. General Housing Authority Operating Information

A. Housing Stock Information

1) New Housing Choice Vouchers that were Project-Based During the Fiscal Year

OHA project-based 271 new units in FY 2015, which is about 96 percent (96%) of the amount anticipated in the FY 2015 MTW Annual Plan. Marcus Garvey Commons, Lion Creek Crossings – Phase V, Cathedral Gardens, Lakeside Senior Apartments, Redwood Hill and 3706 San Pablo were all sites where OHA issued new Project-Based Vouchers (PBV). Marcus Garvey Commons was projected to lease up in FY 2014 but was delayed and leased up in FY 2015, adding an additional 10 units that were not anticipated in FY2015.

The total number of project-based vouchers in OHA's portfolio is 1,969, which is about 15% of the agency's MTW voucher portfolio. MacArthur Transit Village was projected to be leased up in FY2015, but is slightly behind schedule and will be placed in service in FY 2016. The anticipated versus actual totals for PBVs committed and leased up are quite different from the FY2015 plan because OHA made adjustments to the new form 50900 and consequently the figures were revised to be consistent with the form's requirements. A list of sites is included in Appendix B.

Table 1: New Housing Choice Vouchers that were Project-Based During the Fiscal Year			
Property Name	Anticipated Number of New Vouchers to be Project-Based *	Actual Number of New Vouchers that were Project-Based	Description of Project
Cathedral Gardens	43	43	Cathedral Gardens will provide 100 new one-,two-, and three-bedroom apartments to families and persons with special needs in the Uptown District. The maximum household income served will be up to 60% of AMI. The new development will include the restoration of a historic 1916 rectory that was originally part of the St. Francis de Sales Cathedral complex as well as the new construction of two, three- and four-story multifamily structures.
Lakeside Senior Apartments	91	91	Lakeside Senior Apartments is a 92-unit (all one-bedroom) affordable senior housing development in the Eastlake neighborhood, one block from Lake Merritt. The site will serve seniors with maximum incomes up to 50% of AMI.
Mural	22	0	Mural will have 22 project-based units as part of a larger 624-unit project that includes rental and homeownership units. The PBV units will serve one, two-and three-bedroom households and is located in the Temescal neighborhood.
Lion Creek Crossing V	127	127	Lion Creek Crossing V is 128 units of studio, one-and two-bedroom apartments serving seniors, aged 55 and older, with maximum incomes of up to 50% of AMI. The development is the fifth and final phase of a ten-year, transit-oriented, redevelopment project that is located blocks away from the Oakland Coliseum BART station.
Marcus Garvey Commons	10	10	Marcus Garvey Commons is a 22 unit existing family affordable housing preservation rehabilitation project funded by the City of Oakland. Of the 22 total units, (10) one-, two-, three- and four-bedrooms were project based.
Anticipated Total Number of New Vouchers to be Project-Based *		Actual Total Number of New Vouchers that were Project-Based	<div> <div>Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year *</div> <div>20</div> <div>Actual Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year</div> <div>3125</div> </div>
283		271	<div> <div>Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year *</div> <div>440</div> <div>Actual Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year</div> <div>1969</div> </div>
* From the Plan			

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

OHA did not make any other changes to the housing stock during the fiscal year.

OHA submitted a disposition application to the Special Application Center on December 22, 2010 requesting approval to dispose of 383 units in five senior sites. OHA initiated the disposition application in response to the backlog of deferred maintenance, due to long-term decreases in funding in the public housing program, and the increasing operating costs that make the sites financially unviable. If the application is approved, OHA plans to remove those units from its inventory.

Table 2: Other Changes to the Housing Stock that Occurred During the Fiscal Year	
	N/A
	N/A
	N/A

Examples of the types of other changes can include but are not limited to units that are held off-line due to the relocation of residents, units that are off-line due to substantial rehabilitation and potential plans for acquiring units.

3) General Description of Actual Capital Fund Expenditures During the Plan Year

OHA included the Capital Fund Program (CFP) funds as part of its MTW Block Grant. During FY 2015, OHA made improvements to its Project-Based Voucher portfolio and its Public Housing units by completing building and site renovation and unit rehabilitation including landscaping improvements for the Project-Based Voucher Oakland Affordable Housing Preservation Initiative (OAHPI) portfolio. Roof repairs were completed at Harrison Tower and Peralta Village. Security cameras were installed at Lockwood Gardens, a large Public Housing development, to increase safety and security for residents and facilitate crime resolution by the Oakland Housing Authority Police Department (OHAPD). Leased Housing, OHA's largest department, will lease offices in new building, renovations to the 1922 structure were made and the office was customized by OHA to improve the client experience and facilitate the 45,993 clients that department sees annually. OHA also funded affordable housing development

activities through a loan to developer partners for the Ave Vista family development and a pre-development loan to the 1110 Jackson Street project.

Table 3: General Description of Actual Capital Fund Expenditures During the Plan Year
OHA included the Capital Fund Program (CFP) funds as part of its MTW Block Grant. During FY 2015, OHA made improvements to its Project-Based Voucher portfolio and its Public Housing units by completing building and site renovation and unit rehabilitation including landscaping improvements for the Project-Based Voucher Oakland Affordable Housing Preservation Initiative (OAHPI) portfolio. Roof repairs were completed at Harrison Tower and Peralta Village. Security cameras were installed at Lockwood Gardens, a large Public Housing development, to increase safety and security for residents and facilitate crime resolution by the Oakland Housing Authority Police Department (OHAPD). Leased Housing, OHA's largest department, will lease offices in new building, renovations to the 1922 structure were made and the office was customized by OHA to improve the client experience and facilitate the 45,993 clients that department sees annually. OHA also funded affordable housing development activities through a loan to developer partners for the Ave Vista family development and a pre-development loan to the 1110 Jackson Street project.

4) Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End

There are a total of 1,574 tax credit units that are in service, some of which have additional layered subsidies through public housing, Section 8, project-based vouchers and other State and Local and HUD funding sources. Through the single fund flexibility, 317 new units in mixed subsidy developments were placed in service for this portfolio during FY2015. A list of the projects is included in Appendix C. OHA has an ownership position in all these properties, and provides property management oversight and Asset Management Services to this portfolio to ensure compliance and sustainability of the property.

Table 4: Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End		
Housing Program *	Total Units	Overview of the Program
LIHTC with State and Local Funding sources	447	OHA has tax credit units that have additional subsidy layering from State and Local funding sources such as City Redevelopment funding, Mental Health Services Act (MHSA), Multifamily Housing Program (MHP), California Housing Financy Agency (CalHFA), Affordable Housing Program (AHP) and Californica Housing and Community Development Infill Infrastructure Grant Program (HCD/IIG).
LIHTC with Non-MTW HUD Funding sources	240	OHA has developments with tax credit units with additional subsidy layering from Non-MTW HUD funding sources such as Housing Opportunities for Person with AIDS (HOPWA), 236/PBRA, 236/Market and HUD 202/811 PRAC
Other	14	OHA has developments with unsubsidized units that rented to Households with income above 80% AMI. Some of these are manager's units.
Total Other Housing Owned and/or Managed	701	
<p>* Select Housing Program from: Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for other non-MTW Public Housing Authorities, or Other.</p>		
If Other, please describe:		Units without subsidy in tax credit developments that are rented to Households with income above 80% AMI.

B. Leasing Information

1) Actual Number of Households Served at the End of the Fiscal Year

During a year with a challenging leasing environment due to Bay Area rental market escalations which crippled the leasing efforts of our MTW HCV program, OHA continued to serve approximately 99% of the number of families possible through the MTW program. Participation in the Local Housing Assistance Program (LHAP), a tenant-based program, continued to decline as households elect to use the Tenant Protection Voucher and move off-site. Fewer families opted for this in FY2015 because of the challenging rental market and low inventory. The Sponsor Based Housing Assistance Program (SBHAP) maintained relatively steady participation with low turnover rates, given the hard to house populations served by the program. The MOMs program continues, although the DADs program is being revised and did not launch this year and discussions on the design and implementation continue with the County Sheriffs office. In the spring, OHA elected to absorb all Port-in vouchers to offset challenges in delays in leasing new households off the waitlist.

OHA also provides community building events through our Police Department and supportive services and events through our Family and Community Partnerships Department to further our Education and Employment Initiatives helping families achieve self-sufficiency and life goals. These events are open to our Public Housing, Section 8 and mixed finance development families and households that are not receiving subsidy often participate and receive benefits. Examples are regular Food Pantry services in partnership with a local food bank, a community computer lab, Job Fairs and events to celebrate and support the start and end of the school year.

Table 5: Actual Number of Households Served at the End of the Fiscal Year

Housing Program:	Number of Households Served*	
	Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs **	567	701
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs **	33	27
Port-In Vouchers (not absorbed)	N/A	0
Total Projected and Actual Households Served	600	728
<p>* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.</p> <p>** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households served.</p>		
Housing Program:	Unit Months Occupied/Leased****	
	Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ***	6804	8736
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***	396	324
Port-In Vouchers (not absorbed)	N/A	0
Total Projected and Annual Unit Months Occupied/Leased	7200	9060
<p>During a year with a challenging leasing environment due to Bay Area rental market escalations which crippled the leasing efforts of our MTW HCV program, OHA continued to serve close to the maximum number of families possible. Participation in the Local Housing Assistance Program (LHAP), a tenant-based program, continues to decline as households elect to use the Tenant Protection Voucher and move off-site. Fewer families opted for this in FY2015 because of the challenging rental market and low inventory. The Sponsor Based Housing Assistance Program (SBHAP) maintained relatively steady participation with low turnover rates, given the hard to house populations served by the program. The MOMs program continues, although the DADs program is being revised and did not launch this year and discussions on the design and implementation continue with the County Sheriffs office. In the spring, OHA elected to absorb all Port-in vouchers to offset challenges in delays in leasing new households off the waitlist.</p>		
<p>*** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of households served.</p> <p>**** Unit Months Occupied/Leased is the total number of months the housing PHA has occupied/leased units, according to unit category during the year.</p>		
	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	84	1010

2) Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-Income

The majority of OHA's traditional programs and almost half of its non-traditional programs serve very low-income households. Table 6 shows that 86% of families that participated in MTW local, non-traditional programs were very low-income in FY 2015.

Table 6: Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-Income								
HUD will verify compliance with the statutory objective of "assuring that at least 75 percent of the families assisted by the Agency are very low-income families" is being achieved by examining public housing and Housing Choice Voucher family characteristics as submitted into the PIC or its successor system utilizing current resident data at the end of the agency's fiscal year. The PHA will provide information on local, non-traditional families provided with housing assistance at the end of the PHA fiscal year, not reported in PIC or its successor system, in the following format:								
Fiscal Year:	2011	2012	2013	2014	2015	2016	2017	2018
Total Number of Local, Non-Traditional MTW Households Assisted	X	X	X	780	763	X	X	X
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	X	X	X	372	659	X	X	X
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	X	X	X	48%	86%	X	X	X

3) Reporting Compliance with Statutory MTW Requirements: 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 significant increase to the one-person households served in traditional programs and saw a corresponding decrease in three-, four- and five-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.

Mix of Family Sizes Served							
	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained **	30%	28%	19%	13%	6%	3%	100%
Number of Households Served by Family Size this Fiscal Year 2015	5434	3638	1917	1571	641	404	13,605
Percentages of Households Served by Household Size this Fiscal Year 2015	40%	27%	14%	12%	5%	3%	100%
Percentage Change	32%	-5%	-27%	-11%	-21%	-5%	0%
Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages	<p>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- and five-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.</p>						
<p>* "Non-MTW adjustments to the distribution of family sizes" are defined as factors that are outside the control of the PHA. Acceptable "non-MTW adjustments" include, but are not limited to, demographic changes in the community's population. If the PHA includes non-MTW adjustments, HUD expects the explanations of the factors to be thorough and to include information substantiating the numbers used.</p> <p>** The numbers in this row will be the same numbers in the chart above listed under the column "Baseline percentages of family sizes to be maintained."</p> <p>*** The methodology used to obtain these figures will be the same methodology used to determine the "Occupied number of Public Housing units by family size when PHA entered MTW" and "Utilized number of Section 8 Vouchers by family size when PHA entered MTW" in the table immediately above.</p> <p>**** The "Percentages of families served by family size this fiscal year" will reflect adjustments to the mix of families served that are directly due to decisions the PHA has made. HUD expects that in the course of the demonstration, PHAs will make decisions that may alter the number of families served.</p>							

4) Description of any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Fiscal Year End

At our two large public housing sites, OHA has undertaken an aggressive leasing activity strategy in response to lease enforcement activities leading to a higher than expected unit turn-over rate. In order to lease the available two- and three-bedroom units that were vacated, OHA opened the Public Housing wait list in November 2014. OHA is also exploring outsourcing the renovation of units to expedite their readiness for new tenants.

One family housing development (Campbell Village), five senior developments (Oak Grove Plaza North & South, Adel Court, Palo Vista Gardens, and Harrison Towers), and five HOPE VI sites are managed by third party property management companies. The third party management companies manage and administer their own site-based waiting lists, processing annual re-certifications, rehabilitation and leasing of vacant units and lease enforcement.

The Housing Choice Voucher program was affected by a dramatically escalating rental market and extremely limited market rate rental inventory which 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 response, OHA undertook outreach activities to support existing and recruit new landlords to the program to offset the exodus of approximately 112 landlords often due to market conditions. While OHA responded to many requests from landlords for rent increases, tenants on fixed incomes often could not afford the increased rent and were subsequently evicted, facilitating the option for landlords to exit the program. Additionally, OHA saw landlords fail HQS inspections and subsequently allow the HAP contract to go into abatement, and eventual contract cancellation.

OHA's local, non-traditional housing programs include segments of society that would not be successful in a traditional housing assistance program without additional support and services. In the local programs that serve a "hard to house" client base, OHA relies on expert community partners to match social services with housing resources and these programs experienced additional leasing issues due to the challenges of the participants which include managing past negative criminal or credit histories, assisting participants with overcoming substance abuse habits, and adequately addressing mental health concerns that present obstacles to securing and retaining quality housing through intensive services and case management. Evictions due to tenant behaviors that violate the lease terms often results in higher turnover in these programs.

Table 8: Description of any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Fiscal Year End	
Housing Program	Description of Leasing Issues and Solutions
Public Housing	<p>At our two large public housing sites, OHA has undertaken an aggressive leasing activity strategy in response to lease enforcement activities leading to a higher than expected unit turn-over rate. In order to lease the available two- and three-bedroom units that were vacated, OHA opened the Public Housing wait list in November 2014. OHA is also exploring outsourcing the renovation of units to expedite their readiness for new tenants.</p> <p>One family housing development (Campbell Village), five senior developments (Oak Grove Plaza North & South, Adel Court, Palo Vista Gardens, and Harrison Towers), and five HOPE VI sites are managed by third party property management companies. The third party management companies manage and administer their own site-based waiting lists, processing annual re-certifications, rehabilitation and leasing of vacant units and lease enforcement.</p>
MTW Housing Choice Voucher	<p>The Housing Choice Voucher program was affected by a dramatically escalating rental market and extremely limited market rate rental inventory which 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 response, OHA undertook outreach activities to support existing and recruit new landlords to the program to offset the exodus of approximately 112 landlords often due to market conditions. While OHA responded to many requests from landlords for rent increases, tenants on fixed incomes often could not afford the increased rent and were subsequently evicted, facilitating the option for landlords to exit the program. Additionally, OHA saw landlords fail HQS inspections and subsequently allow the HAP contract to go into abatement, and eventual contract cancellation.</p>
Local, Non-Traditional	<p>OHA's local, non-traditional housing programs include segments of society that would not be successful in a traditional housing assistance program without additional support and services. In the local programs that serve a "hard to house" client base, OHA relies on expert community partners to match social services with housing resources and these programs experienced additional leasing issues due to the challenges of the participants which include managing past negative criminal or credit histories, assisting participants with overcoming substance abuse habits, and adequately addressing mental health concerns that present obstacles to securing and retaining quality housing through intensive services and case management. Evictions due to tenant behaviors that violate the lease terms often results in higher turnover in these programs.</p>

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

During FY 2015, OHA implemented two activities that assisted households in achieving self-sufficiency goals. A total of 19 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 9: Number of Households Transitioned To Self-Sufficiency by Fiscal Year End		
Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency
PBV Transitional Housing Programs/11-05	3	Number of MOMS that move from the site with the notice of graduation
Program Extension for Households Receiving \$0 HAP/10-02	16	Successful Exist during and after the 24 months
Households Duplicated Across Activities/Definitions	n/a	* The number provided here should match the outcome reported where metric SS #8 is used.
ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY	19	

C. Wait List Information

1) Wait List Information at Fiscal Year End

Table 10: Wait List Information at Fiscal Year End

Housing Program(s) *	Wait List Type **	Number of Households on Wait List	Wait List Open, Partially Open or Closed ***	Was the Wait List Opened During the Fiscal Year
MTW Housing Choice Voucher	Community Wide	7557	Closed	No
MTW Public Housing (OHA Managed)	Site Based	8601	Yes	Yes - Nov 10, 2014 - Nov. 21, 2014
MTW Public Housing (Third Party Managed)	Site Based	3969	Closed	No
Project-Based Voucher (Third Party Managed)	Site Based	17437	Closed	No
Project-Based Voucher (OHA Managed)	Site Based	2997	Closed	No

More can be added if needed.

* *Select Housing Program* : Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

** *Select Wait List Types*: Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).

*** For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open.

The site-based, Public Housing wait list at Lockwood Gardens and Perata Village was partially open for two (2) and three (3) bedroom units.

If Local, Non-Traditional Program, please describe:

N/a

If Other Wait List Type, please describe:

N/A

If there are any changes to the organizational structure of the wait list or policy changes regarding the wait list, provide a narrative detailing these changes.

N/A

Section III. Proposed MTW Activities: HUD approval requested

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

Section IV. Approved MTW Activities: HUD approval previously granted

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

Table 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 impact. Each activity has been assigned a number based on the fiscal year in which the activity was identified (e.g. 15-01 indicates that the activity was identified in the FY 2015 MTW Annual Plan).

Table 11 Approved MTW Activities: HUD Approval Previously Granted					
Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
15-02	2016	Modified Utility Allowance Policy	Modifies utility allowance policy to be consistent with FFY 2014 federal appropriations requirements that the household's utility allowance is consistent with the minimum subsidy or occupancy standard and eliminates the utility allowance payment.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.11, D.2.a
15-01	2016	Local Area Portability Reform	Revises portability policies in the Housing Choice Voucher program to limit port-outs to local area jurisdictions except for special circumstances.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section D.1.g
14-01	2016	Alternative Recertification Schedules	Changes reexamination of income for elderly and disabled households on fixed incomes to every three years and every two years for wage earning households. Households with fixed income from Social Security will receive automatic adjustments to their rent in interim years based on published cost of living adjustments (COLA) to the subsidy program.	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c
13-01	2016	Rent Reform Pilot Program	Creates a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where: <ul style="list-style-type: none"> Total Tenant Payment (TTP) calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households Triennial recertification schedule for senior and disabled households, biennial schedule for 	-Reduce costs and achieve greater cost effectiveness -Provide incentives for families with children to become economically self-sufficient	Attachment C, Section C.4, C.11 Section D.1.c Section D.2.a

			<p>work-eligible households</p> <ul style="list-style-type: none"> • Eliminate all deductions and earned income disallowance • Recent increases in income excluded in recertification • Absolute minimum rent of \$25 		
12-01	2012	Eliminate Caps on PBV Allocations	Eliminates the cap on the total number of units the Authority can project-base and the number of units that can be project-based in a development	Increase housing choices	Attachment C, Section D.1.e, Section B.3
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 MOMS 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 Attachment D, Section B.2
10-01	2010	Specialized Housing Programs	Increases allocation of resources to the MOMS program to improve outcomes and enhance program coordination. MOMS 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
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	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
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	Reduce costs and achieve greater cost effectiveness	Attachment C, Section C.4, D.1.c

			the subsidy program (i.e. SS, SSI, etc.)		
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 12 Implemented Activities					
Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
12-01	2012	Eliminate Caps on PBV Allocations	Eliminates the cap on the total number of units the Authority can project-base and the number of units that can be project-based in a development	Increase housing choices	Attachment C, Section D.1.e, Section B.3
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
11-05	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 MOMS 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 Attachment D, Section B.2
10-01	2010	Specialized Housing Programs	Increases allocation of resources to the MOMS program to improve outcomes and enhance program coordination. MOMS 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
10-06	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
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
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
07-01	2010	Triennial Income Recertification	This activity is now described under activity #14-01.	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
06-03	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 #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 expands on the previously approved activity to eliminate caps on PBV allocations in all areas.

Under traditional regulations, OHA was restricted to award PBV allocations of up to 20% of the total authorized vouchers in the HCV program and 25% per project. In FY 2015 maintaining the 20% overall limit would equate to 2,563 PBV. Since implementation of

the activity in FY 2010, OHA has awarded 3,126 total PBV, which exceeds the cap by 563 units.

Since inception, OHA has contributed to the creation and preservation of 2,763 PBV assisted units. If the projects were limited to a 25% cap only 774 units would have been eligible for assistance. Through this activity, OHA has been able to assist 2,004 additional units. Table 13 provides a breakdown of the PBVs awarded by development above the 25% cap.

Table 13				
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
Senior Housing				
Jack London Gateway - Phase II	61	15	60	45
Orchards on Foothill	65	16	64	48
Altenheim Senior Housing Phase II	81	20	40	20
St. Joseph's Senior Apartments	84	21	83	77
Merritt Crossing (formerly 6th & Oak Apts.)	70	17	50	33
Lakeside Senior Apartments	92	23	91	68
Lion Creek Crossings Phase V	<u>128</u>	<u>32</u>	<u>127</u>	<u>95</u>
<i>Senior Housing Total</i>	581	144	515	386
Special Needs Housing				
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	<u>28</u>	<u>7</u>	<u>11</u>	<u>4</u>
<i>Special Needs Housing Total</i>	292	72	272	200
Family Affordable Housing				
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	<u>43</u>	<u>10</u>	<u>35</u>	<u>25</u>
<i>Family Affordable Housing Total</i>	509	123	323	200
OHA Former Public Housing				
OHA Scattered Sties	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>
<i>Former Public Housing Total</i>	1,711	427	1,653	1,226
Total Units	3,126	774	2,763	2,004

The development shaded in grey received new PBVs awarded in FY 2015.

Comparison of Outcomes to Baselines and Benchmarks: The Redwood Hill Townhomes project was added in FY 2015 with (11) PBVs allocated for a special needs population. The outcomes achieved during the fiscal year exceeded anticipated benchmarks because allocations were made to Redwood Hill Townhomes and the allocation exceeded the 25% threshold for one site. The additional (11) PBVs also added to a total PBV allocation that already exceeds the 20% limit requirement. The Redwood Hill Townhomes project will set aside units for families with special needs that have experienced domestic violence and who are at-risk of being homeless. Building Futures will provide services to support these families to become safely and supportively housed. Additionally, an on-site Resident Services Coordinator will provide residents with information and referral support, assessment and service plan development, tenant leadership development, lease counseling, life skills counseling/training, access to primary and behavioral health services, employment skills development, benefit navigation, food assistance and other needs that may be barriers to housing retention.

Status Update/Schedule: This activity was utilized for one project 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: No changes were made 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.

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	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	No.

move (decrease). If units reach a specific type of household, give that type in this box.			(0)	
Standard OHA Metrics				
Number of Units Awarded above 20% of Total Units in the Voucher Program				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of PBV units awarded above 20% of total units in the voucher program.	Number of PBV units awarded above 20% of the total units in the voucher program = Zero (0)	Number of PBV units awarded above 20% of the total units in the voucher program = Zero (0) new and/or preservation units	Actual number of PBV units awarded above 20% of the total units in the voucher program = Eleven (11) new and/or preservation units	Yes – exceeded by eleven (11) units.
Number of Units Created in Developments with Allocations Over 25%				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of units and development opportunities created in developments with allocations over 25%.	Number of PBV units awarded above 25% of the total units in a project = Zero (0)	Number of PBV units awarded above 25% of the total units in a project = Zero (0) new and/or preservation units	Actual number of PBV units awarded above 25% of the total units in a project = 4 new and/or preservation units	Yes – exceeded by (4) units
Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = Zero (0) households	Actual number of households receiving these services after implementation of the activity = eleven (11)	Yes. Eleven new households will receive services.

			households	
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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: 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	Number of Households losing assistance or forced to move prior to	Expected households losing assistance/moving after implementation of the activity = Zero	Number of households losing assistance/moving after implementation of the activity = 6	Yes. The benchmark was exceeded as six (6) families

need to move (decrease).	implementation of the activity = Three (3) households	(0) households	households (in-place families)	retained housing without moving.
HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0) households	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = Zero (0) households	Number of households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 28 households (new lease ups)	Yes. (28) new families were able to lease units increasing their housing choice.
Standard OHA Metrics Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Number of households who would not qualify for an available unit based on household composition = Zero (0) households	Expected housing units of this type after implementation of the activity = 5 households	Number of households who qualified for a unit that would not have without this activity = 28 households.	Yes. The benchmark was exceeded by 460% with 28 households qualifying for units.
Units of Housing Preserved				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI	Housing units preserved prior to implementation of the activity = Zero	Expected housing units preserved after implementation	Actual housing units preserved after implementation	Yes. The benchmark was exceeded

that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	(0) units Verify	of the activity = 2 units	of the activity = 6 units	by 4 units.
Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0) households	Expected number of households receiving these services after implementation of the activity = 5 households	Actual number of households receiving these services after implementation of activity = 10 households are in sites with on-site services providers.	Yes. The benchmark was exceeded by 100%.

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. This activity uses established partnerships with the Alameda County Sheriff's Office, to facilitate the development of local, non-traditional housing programs like the Maximizing Opportunities for Mothers to Succeed (MOMS) initiative, which offers service-enriched transitional housing support to formerly incarcerated women seeking to reunite with their children and deter recidivism. In addition to the housing subsidy, the MOMS 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 participants apply and are screened while in custody 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 MOMS site, case managers work with participants to complete their IAP using various supportive services for the participants and their children.

OHA, along with the primary program partners Alameda County Sheriff's Office (ASCO) and the Alameda County Behavioral Health Care Services (ACBHS) Department, have facilitated a strategic planning process resulting in several program improvements.

Planned additions to the current program structure include a sober living agreement; an alumni participation agreement, stronger coordination of multi-agency intervention for lease non-compliance and additional on-site program activities to enhance parent/child engagement and workforce development for older youth and adults. Following graduation of MOMS participants, several three-bedroom units are being converted to two bedrooms at vacancy turn. This reduction in bedroom size will both accommodate the growing trend of smaller family sizes and create study/work space to support education and work readiness goals for future program participants.

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 nine new admissions during the fiscal year, which achieves 90% of the MOMS benchmark. All nine households complied with the program requirement to participate in services.

Through the MOMS program resources, participants work to become employed and increase their incomes through steady employment. The average earned income for all participant households was \$5,489, with the majority of the earned income coming from two families for a total of \$49,399 annually. These two families maintained employment for 18 months and as part of the graduation from the program, will transition to stable housing. OHA relies on its community partners to provide skill building and job development workshops that help increase the employability of the MOMS participants and one participant was employed part time before recently losing the job and another is involved in a job training program.

It was projected that the Dads Acquiring and Developing Skills (DADS) program would be launched in FY2015, however the 20-unit building that will be used for the MOMS program relocation required substantial rehabilitation started in FY2015 and is projected to be complete in FY2016, so the space for a DADs program was not available.

Performance metrics on participant savings, TANF changes 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 as well as due to the mid-year implementation of some of the performance metrics. As a result, the outcomes are not available but will be incorporated into future reports going forward.

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

Narrative Explanation of Challenges/New Strategies: OHA worked with its partners to revise aspects of this program to better meet the needs of the participant families and

continues to seek committed, qualified service providers. It also seeks to amend contracts and establish on-going procedures in order to be able to track performance metrics like employment status and increases in household savings.

Changes or Modifications to Metrics, Baselines or Benchmarks: Changes to the metrics, baselines, and benchmarks are included in the table below. OHA will also begin measuring the potential decrease in the average amount of HAP paid as compared to the tenant portion from the time of entry in the program through the time of graduation or point in which program self-sufficiency is attained.

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

Standard HUD Metrics 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 = 21 households (10-MOMS and 11 DADS)	Households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 9 households (new admissions)	90% of the MOMS benchmark was achieved. 0% of the DADS benchmark was achieved.
HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 21 households	Number of households receiving these services after implementation of the activity = 9 households	90% of the MOMS benchmark was achieved. 0% of the DADS benchmark was achieved.
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 = 21 households (10 new MOMS plus 11 new DADS)	Average number of households made available after implementation of this activity = 9 (MOMS)	No. 90% of the MOMS benchmark was achieved. 0% of the DADS benchmark was achieved.
<i>Increase in Household Income</i>				
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 = \$13,000	Average earned income of households affected by this policy in dollars = \$5,089	No. 39% of the benchmark was achieved.
<i>Increase in Household Savings</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	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. As a result, OHA will begin measurement of its performance in this area in FY 2016. OHA will have Family and Community Partnerships work with MOMS participants to enroll them in the FSS program to allow them to accumulate escrow savings as they become employed.			
<i>Increase in Positive Outcomes in Employment Status</i>				
<i>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.</i>				
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 = Three (3)	Number of participants employed at during program = Three (3)	Yes. 100% of benchmark was achieved.
(2) Employed Part-Time	Number of participants employed at start of program = Zero (0)	Number of participants employed during program = Four (4)	Number of participants employed during program = Four (4)	Yes. 100% of 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 = Five (5)	Number of participants in Educational program during program = seven (7)	Yes. It was exceeded by 43%.
(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 = six (6)	Number of participants in Job Training program during program = eight (8)	Yes. It was exceeded by two participants.
(5) Unemployed	Number of participants unemployed at start of program = Nine (9)	Number of participants unemployed during program = five (5)	Number of participants unemployed during program = one (1)	Yes. Of the nine participants only one sustained unemployment for the duration of the program.
(6) Other				
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).	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. As a result, OHA will begin measurement of its performance in this area in FY 2016.			
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 = 10 households	Number of households receiving these services after implementation of the activity = 9 households	No. 90% of the benchmark was achieved.
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. As a result, OHA will begin measurement of its performance in this area in FY 2016.			
Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating	Number of households transitioned to self-sufficiency prior to implementation of this activity = Zero (0)	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 = 3 Households	Yes. 100% of benchmark was achieved.

Information in the space provided.				
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MTW Activity #10-01: Specialized Housing Programs

Description of MTW Activity: In partnership with the Alameda County Sheriff's Department, OHA operates the MOMS program. This activity increases the allocation of resources to the MOMS program to improve outcomes and enhance program coordination among partners.

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

Comparison of Outcomes to Baselines and Benchmarks: In FY 2015, 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 far exceeded the expected benchmark of \$100,000 by leveraging over \$361,000 from local non-profits and public agencies.

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. OHA is a participant to a pending ASCO grant application to acquire funding for a multitude of services, including the addition of four (4) case managers for the ASCO transitional programs.

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.

Standard HUD Metrics				
CE #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars) = Zero (0)	Amount leveraged after implementation of the activity (in dollars) = \$100,000	Actual amount leveraged after implementation of the activity = \$238,126	Yes. 238% of the benchmark was achieved.
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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. The number of families benefitting has increased in FY2015, from 90 to 143 families that benefit from the safety net that the additional 18 months of program participation provide and OHA expected to serve that same number of families with this activity. In FY 2015, 142 families were on zero HAP, and 16 left the program during the 18 month period. The outcomes demonstrate that while several households are able to benefit from the protections provided under this activity, with a 34% increase in the average income of families on zero HAP, very few actually move on to exit the program and achieve complete self-sufficiency. 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. Several families were able to take advantage of the safety net due to financial difficulties that forced them back to receiving HAP subsidy. 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. OHA plans to begin an internal referral program to refer those with zero HAP to the Family and Community Partnerships department to help with financial literacy, homeownership and other supportive services to help build the financial stability needed to exit the program.

Due to deficiencies in the new business system, OHA also faced challenges measuring the amount of subsidy provided to participants and the subsequent rental revenue increase. The current system does not maintain historic data that will identify the potential reduction in subsidy over time. However, OHA has ensured that the new

business system will capture and report on this level of data to better understand the impacts over time.

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				
SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars). \$47,711 for 109 households	Expected average earned income of households affected by this policy after implementation of the activity (in dollars) = \$47,711 (0% increase)	Actual average income of households affected by this policy = \$63,784	Yes. 134% of the benchmark was achieved.
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 = 7 households	Yes. The outcomes exceeded the benchmark with a 36% 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).	Due to challenges with the current business system, OHA is not able to measure this metric at this time. The current business system does not maintain historic data that will measure reductions in subsidy over time. As such, OHA is unable to adequately report on this metric and will explore capturing this information within the new business system.			
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.
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SS #8: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self sufficiency (increase). The PHA may create one or more definitions for "self sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Number of households transitioned to self sufficiency (self-termination from the program) = Zero (0) families	Number of households transitioned to self sufficiency = 18 families	Actual number of households transitioned to self sufficiency = 16	No. 88% of the benchmark was achieved.

Standard OHA Metrics

Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	OHA will begin measuring this as it revises the activity to provide zero HAP families with direct referrals to the resources offered by the Family and Community Partnerships Department.			

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, leveraging 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 over 130 hard-to-house households on an annual basis in Oakland.

An additional function of this activity is to mitigate any negative impacts of the public housing disposition for households that may not have been able to be 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 24 households left of the original LHAP families and no new families were added under this activity.

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 2015, four former disposition households utilized their voucher and moved off of the LHAP program leaving 24 households at the end of the fiscal year to be assisted under this activity. Additionally, 205 unique households have been served through the Sponsor-Based Housing Assistance program since inception in 2010, with 135 households being enrolled over the course of FY2015.

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 #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase) LHAP	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 = 24	No. Only 62% of the benchmark was achieved.
SBHAP	Number of households who would not qualify for an available unit based on household composition = Zero (0)	Expected housing units of this type after implementation of the activity = 110	Actual housing units of this type after implementation of the activity = 135	Yes. The benchmark was met and exceeded by 25 families or 8%.
Total number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	Total number of households who would not qualify for an available unit based on household composition = Zero (0)	Total expected housing units of this type after implementation of the activity = 149	Total housing units of this type after implementation of the activity = 159	Yes. The benchmark was exceeded by 7%.
HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). LHAP	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 39	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the	No. 62% of the benchmark was achieved.

			activity = 24	
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). SBHAP	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 110	Actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 135	Yes. The benchmark was met and exceeded by 25 families or 8%.
Total number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Total households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity = Zero (0)	Total expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 149	Total actual households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity = 159	Yes. The benchmark was exceeded by 7%.
HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase). LHAP	Households receiving this type of service prior to implementation of the activity = Zero (0)	Expected number of households receiving these services after implementation of the activity = 14	Actual number of households receiving these services after implementation of the activity = 4	No. 29% of the benchmark was 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	Total actual number of households receiving these services after	Yes. The benchmark was met and exceeded by 25

SBHAP		of the activity =110	implementation of the activity = 135	families or 8%.
Total number of households receiving services aimed to increase housing choice (increase).	Total households receiving this type of service prior to implementation of the activity = Zero (0)	Total expected number of households receiving these services after implementation of the activity =124	Total actual number of households receiving these services after implementation of the activity = 139	Yes. The benchmark was exceeded by 12%.

MTW Activity #09-01: Alternative HQS System

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.

Comparison of Outcomes to Baselines and Benchmarks: This activity continues to provide consistent cost savings. Under traditional program rules, OHA would have to inspect 12,980 units, which would be financially and operationally burdensome. After implementing this activity for over 5 years, OHA began to recognize increased benefits of landlords and tenants better understanding the program and working together to ensure the units are in the condition to pass inspections. Overall, the outcomes of FY 2015 demonstrated that there was a 47% reduction in cost and number of units inspected during FY 2015.

OHA was unable to track two of the performance metrics during the year but is working with the contractor to determine a method of collecting the data on staff time savings and error rates for future reporting periods. We anticipate that we may see an increase in tenant complaints of issues between inspections as we near the end of a two year cycle. We are exploring the capabilities to track these metrics within our new business system and with the vendor performing the inspections.

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				
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = 12,980 inspections *\$30.80 (cost per inspection) = \$399,784	Expected cost of task after implementation of the activity = 9,358 inspections * \$30.80 = \$288,226	Actual cost of task after implementation of the activity = \$213,044	Yes. The outcome exceeded the benchmark by achieving a 47% reduction.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Prior to implementation of this activity, OHA outsourced annual inspections through a contractor. OHA staff is working with the vendor to identify the appropriate mechanism for tracking and reporting on this metric. Given that this metrics was not implemented during FY 2015, there is no data to report during this period. The old business system did not allow scheduling of six month inspections and this process was managed manually by staff taking 1-2 hours per month. Six month inspections were eliminated saving of 1-2 hours per month in staff time.			
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Prior to implementation of this activity, OHA outsourced annual inspections through a contractor. OHA staff is working with the vendor to identify the appropriate mechanism for tracking and reporting on this metric. Given that this metrics was not implemented during FY 2015, there is no data to report during this period. With the conversion to a new business system, staff has noticed an increase in calls from tenants			

	not receiving notices regarding inspections. OHA is investigating the possibility of tracking these errors within the new business system as an error metric.			
Standard OHA Metrics				
Number of Units Inspected				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of units inspected/inspections conducted annually	12,980 units	9,358 units (28% reduction)	6,917 units and inspections	Yes. 119% of the benchmark was achieved

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 FY2015, 320 of the 388 units that were under construction in FY2014 were placed in service. OHA had 59 units in pre-development for the 94th and International site where OHA contributed a residual receipt loan through MTW funding. Construction was started on 166 new family units at Ave Vista (460 Grand Ave.) and 11th and Jackson (1110 Jackson St.). Three developments, Cathedral Gardens, Lakeside Senior and Lion Creek Crossing – Phase V, were completed and leased during FY2015 placing a total of 317 new units in service increasing housing choice for 317 new households. One unit at each site was reserved as a manager's unit. These developments used MTW funds for property acquisition, pre-development and permanent loans. An additional 63 units were rehabilitated as part of the managed PBV 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. All of the 317 new units were in high opportunity, economically vibrant locations affording the families access to thriving mixed income communities.

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 #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Housing units of this type prior to implementation of the activity = Zero (0)	Expected housing units of this type after implementation of the activity = 388 units under construction during the Fiscal Year	Actual housing units of this type after implementation of the activity = 317 units under construction during the Fiscal Year	No. 82% of the benchmark was achieved.
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 = 100 units rehabilitated	Actual housing units of this type after implementation of the activity = 0 units	No. None of the units placed in service were in pre-existing buildings that were rehabilitated.
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 = 400 households	Actual number of households able to move to a better unit after implementation of this activity = 317 units	No. 80% of the benchmark was achieved.
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MTW Activity #07-01: Triennial Income Recertification

Description of MTW Activity: Conduct income reexaminations every three (3) years for elderly and disabled households on fixed incomes in the Public Housing and Section 8 programs. In the interim years, an automatic adjustment is applied to the households' housing payment equal to the cost of living adjustment (COLA) made to the households' related income subsidy program.

Hardship Exception (Rent Reform activity): No families requested hardship exceptions under this activity during the fiscal year.

Comparison of Outcomes to Baselines and Benchmarks: OHA continued to assist families under this activity while the program-wide rent reform activity awaits implementation. The number of recertifications decreased in FY 2015 as more families became eligible. In FY 2015, the number of eligible households was 3,081 as a result of families increasing their income and becoming ineligible for this activity, as well as a number of single member households deceased. This number will continue to fluctuate throughout the year. When the activity first began in March 2010, there were 3,092 households identified as eligible.

Eligible households were divided into three groups of roughly equal size. Every year, one group receives a full rent review while the other two groups have their rent payment updated based on the annual cost of living increase or decrease related to their income subsidy program (a COLA review). The full rent reviews are conducted by Housing Assistance Representatives, while the updates based on COLAs are handled by the Eligibility Technicians. This cycle rotates annually so that every group participates in a full rent review every three years; see Table 14.

Table 14		
Section 8 Program Triennial Review Schedule		
Household Group	Full Rent Review Year	Full Rent Review Year
Group A	2010	2013
Group B	2011	2014
Group C	2012	2015

In FY 2015, staff conducted 1,113 full rent reviews and 1,462 COLA reviews. In March 2015, staff discontinued COLA reviews. Overall this activity resulted in a 51% reduction in the amount of reviews that were conducted. The average time to complete a full rent review was based on management estimates. The full rent review includes the time taken to prepare the packet, follow up with residents, and perform data entry. Hourly rate calculations were based on an average of the salary and benefits for the positions described. This activity resulted in a 49% reduction in the amount of staff time and staff costs. See Table 15 for a breakdown of the number of reviews, staff time, and staff costs associated with this activity.

Table 15 Section 8 Triennial Review Breakdown for FY 2015			
	Full Rent Reviews	COLA Reviews	Total
Total Number of Reviews	1,113	1,462	2,575
Hours per Review	1	0.33	
Total Staff Hours for Reviews	1,113	482	1,595
Staff Cost per Review	\$41.80	\$35.60	
Total Staff Costs for Reviews	\$46,523	\$17,176	\$63,699

Since this is a rent reform initiative, a hardship policy has been established that states that households may request an interim review at any time if they believe their rent portion would be lower than the stated cost of living increase or decrease. In FY 2015, no families requested a full rent review as a result of implementing the triennial reexamination schedule.

Overall, OHA exceeded expectations in all areas measured. Staff revised operating procedures to exclude the COLA calculation resulting in additional time and costs savings for both staff and residents, in addition to a modest income savings for the residents.

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

Narrative Explanation of Challenges/New Strategies: OHA implemented a new business system during FY2015 and is working with the vendor to explore creating reports that would allow the rental revenue savings to be captured. The feasibility of these metrics is still under exploration. The current data collection strategies would make it too burdensome to collect this information.

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: Due to the financial burden on the tenant and the excessive administrative burden on agency staff, when the published cost of living adjustment increases, OHA elected not to process the cost of living adjustment for fixed income households starting in March 2015. This change will allow tenants access to modest levels of additional income and will relieve staff time to process other tasks.

Standard HUD Metrics				
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$41.49 employee salary/hour * 3,081 hours = \$128,755	Expected cost of task after implementation of the activity = \$41.79 * 1,698 = \$70,959	Actual cost of task after implementation of the activity = \$63,699	Yes. OHA exceeded the benchmark and achieved a 51% reduction in costs to complete rent reviews.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 1 hour/review * 3,081 files = 3,081 hours	Expected amount of total staff time dedicated to the task after implementation of the activity = 1 hour * 1,698 files + .33 hour * 2,064 COLA files = 1,698 hours (55% reduction)	Actual amount of total staff time dedicated to the task after implementation of the activity = 1,595hours	Yes. OHA exceeded the benchmark and achieved a 49% reduction in the amount of time to complete rent reviews.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Rental revenue in dollars (increase).	OHA is not able to measure this metric at this time. The databases maintained by staff do not capture the rental revenue for individual participants. OHA has implemented a new business system and is working with the vendor to refine the reports and data collection methods to capture this information.
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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: Outcomes for this activity were unable to be measured during FY 2015.

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

Narrative Explanation of Challenges/New Strategies: OHA initially created this activity to measure different outcomes than those required under the standard HUD metrics. The new standard metrics do not represent the activity and we respectfully request that they be revised to more accurately represent the activity outcomes.

Changes or Modifications to Metrics, Baselines or Benchmarks: OHA will change the metrics, baselines, and benchmarks to more adequately measure performance in the areas defined by the standard HUD metrics.

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

Standard HUD Metrics				
CE #1: Agency Cost Savings				
Unit Measurement	of	Baseline	Benchmark	Outcome Benchmark Achieved?
Total cost of determining program eligibility in dollars (decrease).		Indicators do not represent the activity and we respectfully suggest that they be revised to represent outcomes.		
Total cost of lease available vacant units to public housing applicants in dollars (decrease).		Indicators do not represent the activity and we respectfully suggest that they be revised to represent outcomes.		
CE #2: Staff Time Savings				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Indicators do not represent the activity and we respectfully suggest that they be revised to represent outcomes.			
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).	Indicators do not represent the activity and we respectfully suggest that they be revised to represent outcomes.			
HC #3: Decrease in Wait List Time				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	Indicators do not represent the activity and we respectfully suggest that they be revised to represent outcomes.			

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. Three new developments were awarded PBV funding as a result of their selection for City of Oakland Notice of Funding, a competitive selection process. All developments are new construction projects and a total of 31 PBV units were awarded as follows:

Table 16 Allocation of PBV Units		
Project Name	Award Date	Number of PBV Units
Civic Center TOD	7/22/2014	10
Redwood Hill Townhomes	6/1/2015	11
3706 San Pablo Ave.	6/1/2015	10

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.

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

Changes or Modifications to Metrics, Baselines or Benchmarks: Non changes were made to the metrics, baselines or benchmarks.

Standard HUD Metrics CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity = \$7,500 per RFP	Expected cost of task after implementation of the activity = \$0	Three projects 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.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity = 100 hours per RFP	Expected amount of total staff time dedicated to the task after implementation of the activity = 15 hours per RFP	Three projects were awarded PBV funding without an OHA administered RFP - Saving = 255 hours staff time	Yes. OHA spent 45 hours instead of 300 hours of staff time to complete the task.
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	Number of households who would not qualify for an available unit based on household composition = Zero	Expected housing units of this type after implementation of the activity =	Expected units of this type of housing after implementation of the activity = 31 units	Yes.

activity (increase). Special needs populations.	(0)	Zero (0)		
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)	Housing units preserved prior to implementation of the activity = Zero (0)	Housing units preserved after implementation of the activity = Zero (0)	No. All units allocated are for new construction developments.

B. Not Yet Implemented Activities

Table 14					
Approved MTW Activities Not Yet Implemented					
Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
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	Not Yet Implemented (NYI)	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	NYI	Rent Reform Pilot Program	Creates a pilot program to test rent reform strategies at Campbell Village (Public Housing) and AMP 10 (Section 8 PBV) where: <ul style="list-style-type: none"> • Total Tenant Payment (TTP) calculated based on 27.5% of gross annual income for seniors and disabled households and 27% for work-eligible households • Triennial recertification schedule for senior and disabled households, biennial schedule for work-eligible households • Eliminate all deductions and earned income disallowance • Recent increases in income excluded in recertification • Absolute minimum rent of \$25 	-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
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

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. Evidence shows that housing authorities in neighboring counties administer about 924 OHA vouchers causing a loss in 80 percent (80%) of the administrative fee. While the objective of the Housing Choice Voucher program is to provide increased housing options for families, OHA finds that many households exercise the option to move with their vouchers to neighboring housing authorities, especially those without MTW programs or with higher payment standards. Given the prevalence of local area port outs, the areas of concentration of port out requests, and their negative impact on program administration and self-sufficiency goals, OHA

requests approval to quell port-outs to jurisdictions in all nine counties and initially will implement the policy in five counties. The policy will be expanded to include additional jurisdictions as needed.

OHA anticipates that some households will need to move out of Oakland for special needs. This new portability policy will allow families to move their tenant based vouchers locally under limited circumstances such as the following exceptions:

- Reasonable accommodation for persons with a disability
- Verifiable employment opportunity more than 35 miles from the 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 will allow 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.

Actions Taken Toward Implementation: As required in the approved activity, notification was mailed to all affected tenants in Spring of 2015 in preparation for implementation at the start of FY2016. OHA has seen a decrease in port requests in general to the designated counties due to the high rental markets affecting the entire Bay Area, reducing the inventory of available and affordable stock for tenants desiring to move. We expect to continue to see a decline in port requests as long as the Bay Area rental market remains impacted by limited and expensive inventory. Additionally all

neighboring jurisdictions are currently absorbing ported vouchers, due to underutilization of the HCV program regionally.

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. OHA administrative costs for providing a tenant utility allowance and/or a reimbursement payment will decrease, causing tenants to exercise conservation methods or select more energy/water efficient homes.

Actions Taken Toward Implementation: Initiated the activity with a planned implementation date of FY2016. Implementation planning has begun for this activity and communication has been distributed to the tenant-based portfolio to provide the required 6 month advance notification. OHA converted to a new business system during FY 2015 and as with any conversion of this scale, additional testing is required to ensure a smooth implementation. As described in the FY 2015 plan where this activity was proposed, we expect to develop a phased approach to execute this activity in our Public Housing and PBV portfolio.

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. During the interim years, an application of a cost of living adjustment (COLA) made to the households' related income subsidy program will be made at the Executive Director's discretion. 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 for wage earning households. All households that report no income, no income from wages, or temporary income remain on an annual schedule for recertifications. OHA requires the households on the annual recertification schedule to report increases in income.

Actions Taken Toward Implementation: The requirements under this activity require an enhancement to the business system and OHA is working with the system vendor on changes to allow full implementation. This activity will be implemented agency-wide when the changes to the new business system have been successfully launched and proves able to collect, monitor, and report on all of the performance metrics under this activity. OHA has begun a detailed notification process for the tenant-based portfolio.

The expected timeline for implementation is FY 2016 after the changes to the new business system are in effect.

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 implemented a new business system in FY2015, which will be able to adequately capture and track data required to report on this activity. OHA also continued to refine the timeline for implementation of this activity to launch in FY 2016, with a detailed notification and recertification process for all affected tenants. Implementation planning requires additional coordination because one of the pilot groups is managed by OHA through a third party management vendor with a different business system used to track resident information. Initial implementation planning for each pilot group has begun.

MTW Activity #11-02: Standardize Transfer Policy

Description of MTW Activity: Adopt a policy to allow residents to transfer from Public Housing or PBV assisted housing to the tenant-based Section 8 voucher program.

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.

Actions Taken Toward Implementation: Due to challenges with funding and the overwhelming needs of families on the waitlist, OHA determined it was in the best interest of the agency to hold implementation of this activity for FY 2015. OHA will explore implementation of this activity pending the outcome of negotiations of an extension of the MTW Standard Agreement and stabilization of the operating subsidy funding in the future.

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

Description of MTW Activity: Develop a PBV sub-program to award long-term Section 8 assistance to Single Room Occupancy (SRO) and studio apartment developments offering service enriched housing.

Actions Taken Toward Implementation: OHA continued to hold this activity and not implement it due to funding and MTW contract uncertainties. Due to the increasing market rate rents and limited supply of market rate units in the area OHA may implement this as a tool to preserve units and MTW HCV utilization in the future, once the MTW contract is extended.

C. Activities on Hold

Table 15 Approved MTW Activities on Hold					
Activity #	Fiscal Year Implemented	MTW Activity Name	Description	Statutory Objective(s)	Authorization(s)
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
10-07	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
09-02	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 #10-03: 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.

Actions Taken Toward Reactivation: There were no new PBV projects awarded or in the pipeline that required this activity during the fiscal year. The activity was kept on hold in case new projects were awarded, but due to funding limitations the activity was not required in FY 2015. OHA is in discussions with current PBV projects to expand their current PBS8 contract to include additional nearby properties, using this Activity for non-contiguous site awards to lessen the density of very low/extremely low income households, including those with special needs, at one location and improve housing choices for participating households.

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.

Actions Taken Toward Reactivation: No projects required the use of this activity during the fiscal and program year. OHA began exploring options to update the comparability analyses used for this activity to ensure accuracy and usefulness when the activity is reactivated in the future.

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

Description of MTW Activity: As a result of disposition, some households may become considered “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.

Reactivation Plan Update: The activity is on hold until OHA completes additional public housing dispositions/conversions. OHA has a pending disposition application for senior sites and will re-activate this activity when the application is approved. The activity will be reactivated as needed when OHA initiates conversion of public housing units.

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 2015, but the activity will be reactivated when the application is approved in the future.

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.

Actions Taken Toward Reactivation: OHA is exploring the capabilities of the new business system to expand service and data tracking for the FSS program participants. This activity will be reactivated after staff develops a thorough implementation plan for both the PH and HCV programs, and as part of the plan will develop a clear methodology for tracking and reporting information on program participants using the new functionality within the new business system.

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 in the future. Until such time, the activity will remain on hold.

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 viable projects come on-line that would require use of this MTW authorization. OHA wishes to keep the activity active to ensure the availability of the resource if needed in the future, particularly in light of the current escalating rental market and displacement from naturally occurring affordable housing units that is occurring in the City.

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.

Actions Taken Toward Reactivation: The OHA development at 94th and International had PBV units awarded through funding available via the City NOFA process. If this funding had not been available, this activity would have used to make the PBV award. Thus far, the activity has assisted OHA in creating and preserving 2,163 PBV units in Oakland.

D. Closed Out Activities

OHA does not have any closed out activities to report for FY 2015.

Section V. Sources and Uses of Funds

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

1) Actual Sources and Uses 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, 2015.

2) 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 resulting 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 Development of Non-Public Housing Units Using Replacement Housing Factor (RHF) Funds

OHA had an approved RHF plan which allowed for the accumulation of RHF funding over time to use on affordable housing units that do not have a Public Housing subsidy attached. With this authorization, OHA made a development loan to its affiliate for the construction of Ave Vista family housing. Pre-development loan funding was provided to the 1110 Jackson Street development from a capital fund program grant.

Fund Operations

The single fund flexibility allowed OHA to invest in high-priority areas and fund OHA operations particularly in the area of providing resident services and increasing the level of security through police services.

- Through the Family and Community Partnerships Department OHA utilized its MTW flexibility to build community organization and public agency partnerships

that support the social, educational, and economic success of OHA residents. In partnership with the Oakland Private Industry Council and other local apprenticeship employment consulting organizations, OHA worked diligently to improve academic outcomes and job readiness of its residents. The partnership with the Oakland Unified School District through OHA's Education Initiative was a direct result of the single fund flexibility. Through this data sharing partnership, OHA is able to increase attendance, literacy and academic achievement of OHA youth. Through the single fund budget, OHA supported the Parent Ambassadors project, the Family Education Achievement Project initiative, and other programs designed to promote the importance of parent engagement in childhood education as a means of addressing the problem of chronic absenteeism and improving level of academic achievement among OHA children. Other MTW supported initiatives supported back to school readiness, distributed school supplies and facilitated reminder calls about school attendance.

With the opening of the Resident Leadership Center last year, OHA launched the Resident Leadership Engagement and Development (LEAD) program which is available to resident graduates who have completed the 12-week 60 hour leadership curriculum called NLI and Resident Advisory Board members. OHA supports the LEAD program through leadership training, promoting leader initiatives, providing office space and resources for residents to undertake the hard work of project implementation, to align community leaders and work collaboratively bringing potential partners and stakeholders together.

FCP was very successful in delivering its annual variety of programs and services directly aimed at engaging families with children through the annual summer lunch program, Back Pack Giveaway, Summer Youth Education and Employment Program and the new Mayor's Classrooms to Careers summer employment program. Many of the initiatives focused on increasing basic every day needs called "safety net services" that included food, transportation, uniforms and clothing. Mental health support through parental programs and therapeutic sessions for youth through schools helped support youth with challenges work towards success. Despite a challenging housing market, OHA continued its homeownership program and facilitated several successful purchases for program participants. OHA developed the keeping it REAL (Resident Exercise Activity Leaders) program for seniors which provides multiple group exercise sessions per week to promote physical activity and encourage activities to support healthy aging.

- Through the single fund flexibility, OHA funds the Oakland Housing Authority Police Department (OHAPD) to provide high-quality, public safety and crime prevention services to OHA communities. Through several strategies including community policing, youth engagement, participating in National Night Out activities, and the Crime Alert program, OHA increased safety at OHA sites through both crime prevention through environment (physical) design and law

enforcement strategies, for our residents. OHAPD also employed various approaches to diminishing program abuse and violations through its Fraud Investigations Unit.

OHAPD is a state accredited Police Department as well as a Nationally Accredited Department through the Commission on Accreditation for Law Enforcement Agencies (CALEA) where it is honored to be designated a “Flagship” agency. In addition, keeping residential strategies at the forefront of the Department’s dominate operating philosophy the Department has been a recipient of 14 National NARHO awards, including the Award of Excellence for the innovative “Community Alert Program.” The fraud prevention investigates program fraud and preserves program integrity. In FY2015, the program recovered \$286,430 in HUD funds and over the past five years over \$1.5 million has been recovered.

Additional OHAPD crime prevention resident services include, an Explorer/ Cadet Program which support youth between the ages of 14 and 21 in learning aspects of law enforcement, as well as assists youth in achieving their secondary and college educational goals; annual youth engagement activities including museums, fishing and other educational field trips, bike riding excursions, camping trips, hikes, and attendance to professional ball games. Through these activities, youth establish not just a partnership with officers but friendships with youth from other parts of the city. These crime prevention strategies support the Authority in achieving its goal of have providing safe nurturing environments.

Table 16: Actual Sources and Uses of MTW Funding for the Fiscal Year
PHAs shall submit their unaudited and audited information in the prescribed FDS format through the Financial Assessment System - PHA (FASPHA), or its successor system
Describe the Activities that Used Only MTW Single Fund Flexibility
<p>Through the Family and Community Partnerships Department OHA utilized its MTW flexibility to build community organization and public agency partnerships that support the social, educational, and economic success of OHA residents. In partnership with the Oakland Private Industry Council and other local apprenticeship employment consulting organizations, OHA worked diligently to improve academic outcomes and job readiness of its residents. The partnership with the Oakland Unified School District through OHA's Education Initiative was a direct result of the single fund flexibility. Through this data sharing partnership, OHA is able to increase attendance, literacy and academic achievement of OHA youth. Through the single fund budget, OHA supported the Parent Ambassadors project, the Family Education Achievement Project initiative, and other programs designed to promote the importance of parent engagement in childhood education as a means of addressing the problem of chronic absenteeism and improving level of academic achievement among OHA children. Other MTW supported initiatives supported back to school readiness, distributed school supplies and facilitated reminder calls about school attendance.</p> <p>Through the single fund flexibility, OHA funds the Oakland Housing Authority Police Department (OHAPD) to provide high-quality, public safety and crime prevention services to OHA communities. Through several strategies including community policing, youth engagement, participating in National Night Out activities, and the Crime Alert program, OHA increased safety at OHA sites through both crime prevention through environment (physical) design and law enforcement strategies, for our residents. OHAPD also employed various approaches to diminishing program abuse and violations through its Fraud Investigations Unit.</p> <p>OHA had an approved RHF plan which allowed for the accumulation of RHF funding over time to use on affordable housing units that do not have a Public Housing subsidy attached. With this authorization, OHA made a development loan to its affiliate for the construction of Ave Vista family housing.</p>

B. MTW Report: Local Asset Management Plan

OHA did not implement a local asset management plan during FY 2015.

Table 17: MTW Report: Local Asset Management Plan

Has the PHA allocated costs within statute during the plan year?

Has the PHA implemented a local asset management plan (LAMP)?

or

If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and approved. It shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.

Has the PHA provided a LAMP in the appendix?

or

OHA did not implement a local asset management plan in FY 2015

C. MTW Report: Commitment of Unspent Funds

OHA is not required to complete this section at this time.

Table 18: Commitment of Unspent Funds

In the table below, provide planned commitments or obligations of unspent MTW funds at the end of the PHA's fiscal year.

Account	Planned Expenditure	Obligated Funds	Committed Funds
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Total Obligated or Committed Funds:		0	0

OHA is not required to complete this portion at this time.

Note: Written notice of a definition of MTW reserves will be forthcoming. Until HUD issues a methodology for defining reserves, including a definition of obligations and commitments, MTW agencies are not required to complete this section.

Section VI. Administrative

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

There are no items to report under this section.

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

OHA engaged with an outside contractor and subject matter expert on homelessness to perform a program evaluation of the Sponsor-Based Housing Assistance Program authorized by Activity #10-06. The evaluation team collected and analyzed data for 125 clients who entered the SBHAP from June 1, 2010 to June 30, 2012. The evaluation focused on the first groups of people served by SBHAP, homeless people in encampments (both with and without diagnoses of severe mental illness), adults returning from incarceration at San Quentin, and youth involved with the criminal justice system.

The evaluation found that SBHAP executes the “housing first” model successfully by using subject matter experts with extensive experience serving the target population groups. The selection of participants is complying with program goals of reaching those with the highest need at the greatest risk of becoming homeless. Housing placement occurs rapidly, but has slowed over time increasing from 37 to 50 days in the second year. Establishing relationships with landlords was an early barrier or delay and later application processing and HQS inspections caused most delays. The program provides tailored case management designed to address barriers clients face in becoming stably housed.

The program is moderately successful at transitioning participants from SBHAP subsidy to non-subsidized stable housing situations. Of the first 125 participants, 48 have left the program and 60% of those exited to housing that was deemed stable or permanent. The remaining 77 remained in SBHAP supported units. Of those that left the program, the most common unstable destinations were jail (15%) or homelessness (12%).

The evaluation team suggests that permanent supportive housing is a better program model for the encampment population, while the adult and youth re-entry populations are appropriate for short-term, subsidized housing stays.

SBHAP Evaluation Highlights	
What Worked?	What Didn't Work?
<ul style="list-style-type: none"> • Identified vulnerable population at risk of or experiencing homelessness • Quickly housed vulnerable clients • Wrap around services & case management • Wide range of resources to address: housing barriers related to mental health, substance abuse, employment • Most clients exist to stable housing • Nearly all had an increase in income • First Place maintained true to temporary rental assistance approach 	<ul style="list-style-type: none"> • Some providers implemented a program more consistent with permanent housing • Perception of staying in SBHAP as a stable outcome by some providers • Few clients graduated by sufficiently increasing their income to live independently • Most existed due to some kind of negative housing circumstance • Very few option exist for clients who could transition out of SBHAP housing because cannot afford unsubsidized housing

Recommendations included developing a logic model for each target population with specific metrics for each group that reflect differing expectations for:

- 1) Duration of SBHAP subsidy;
- 2) Access to benefits income;
- 3) Potential for employment and earnings growth;
- 4) Other goals appropriate to the population;
- 5) Stability of housing following exit from program over a period of two years.

For all populations, OHA should define for service providers whether remaining in an SBHAP subsidized unit qualifies as stable housing. Youth should be screened by the service provider to identify those with the highest risk of becoming homeless and all providers should be required to track lease-up speed.

C. Certification from the Board of Commissioners

Certification of Compliance with MTW Statutory Requirements

The Oakland Housing Authority Board of Commissioners approves the submission of the Fiscal Year 2015 MTW Annual Report. The Oakland Housing Authority 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 Authority are very low-income families; and
- 2) Continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and
- 3) Maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration.

The FY 2015 MTW Annual Report is in compliance with all applicable MTW regulations and requirements.

Oakland Housing Authority:

*Madelene C. Hartwig Vice-Chair
for Gregory D. Hartwig*

Gregory D. Hartwig
Chair, Board of Commissioners

9/28/15

Date

Appendices

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. Glossary of Acronyms

APPENDIX A

Board Resolution

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

On Motion of Commissioner: Janny Castillo

Seconded by Commissioner: Barbara Montgomery

And approved by the following vote:

AYES: Commissioners Hurd, Castillo, Montgomery, Jung Lee, Griggs Murphy

NAYS: 0

ABSTAIN: 0

EXCUSED: Commissioner Pitts and Chair Hartwig

ABSENT: 0

THE FOLLOWING RESOLUTION WAS ADOPTED:

NUMBER: 4647

**RESOLUTION ACCEPTING THE FISCAL YEAR 2015 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) 2015 MTW Annual Plan on March 24, 2014; and

WHEREAS, the FY 2015 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 2015 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 2015 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 2015 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 2015 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 28, 2015*


Eric Johnson, Secretary/Executive Director

ADOPTED: September 28, 2015

RESOLUTION NO. 4647

APPENDIX B

Project-Based Voucher Allocations

Project-Based Voucher Allocations as of June 30, 2015				
Development Name	Date of Board Approval	# of PBV Units	Contract Date	Population Served
HAP contracts				
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 th St. Apartments at Central Station	1/22/2007	20	11/25/2009	Low Income Families
Tassafaranga 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
Tassafaranga 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	6	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 (1554)	7/27/2009	636	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	28	5/8/2012	Low Income Families / Mod Rehab Conversion
*Madison Park (96)	6/11/2011	34	6/7/2012	Low Income Families / Mod Rehab Conversion
Merritt Crossing Apts (6 th and Oak)	5/4/2009	50	6/27/2012	Senior
720 E 11 th 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 Ganey Commons	4/11/2011	10	3/17/2015	Low Income Families
Units under HAP Contract		1,969		
Conversion Projects				
*Harp Plaza (19)	5/24/2010	1	8/1/2010	Low Income Families
*Effie's House (10)	5/4/2009	4	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 (1554)	7/27/2009	918	In Progress	Low Income Families / Public Housing Disposition
*Hugh Taylor house (35)	6/11/2011	7	5/8/2012	Low Income Families / Mod Rehab Conversion
*Madison Park (96)	6/11/2011	62	6/7/2012	Low Income Families / Mod Rehab Conversion
Units under HAP that will convert to PBV at turnover*		995		
AHAP Contracts				
MacArthur Transit Village	2/28/2011	22	in development	Low Income Families
460 Grand	3/16/2010	34	in development	Low Income Families
1701 Martin Luther King Jr. Way	5/20/2013	25	in development	Special Needs / Homeless / HIV/AIDS
11th and Jackson	11/30/2010	35	in development	Low Income Families
Units under AHAP Contract		116		
Conditional Awards				
Civic Center TOD	7/22/2014	10	pending	Special Needs / Homeless
94th and International	10/17/2011	14	pending	Low Income Families
Redwood Hill Townhomes	6/1/2015	11	pending	Low Income Families/Special Needs
3706 San Pablo Avenue	6/1/2015	10	pending	Low Income Families
Units with conditional award		45		
Total PBV Units Allocated		3,125		

* 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	Other * (Descriptions in Table 4)	Unsubsidized Units
HOPE VI Sites						
	Chestnut Court	72	45		26	1
	Linden Court	79	38		40	1
	Mandela Gateway	168	46	30	90	2
	Foothill Family Apartments	65	21	11	33	0
	Lion Creek Crossings - Phases 1 - 5	567	157	171	234	5
Other Mixed Developments						
	Tassafaronga Village - Phases 1 and 2	157		99	56	2
	Cathedral Gardens	100		43	56	1
	Keller	201			201	
	Harrison Senior	73		11	61	1
	Lakeside Senior Apts.	92		91		1
Total Units		1574	307	456	797	14

APPENDIX D

Affordable Housing Development Activities

Affordable Housing Development Activities by Unit Type						
	FY 2015 Outcomes Non-traditional Units	FY 2015 Outcomes Traditional Units	Total Units	Public Housing	Project- Based Vouchers	Tax Credit Only
PREDEVELOPMENT						
94th and International	<u>45</u>	<u>14</u>	<u>59</u>	<u>0</u>	<u>14</u>	<u>45</u>
<i>Total in Predevelopment</i>	45	14	59	0	14	45
UNDER CONSTRUCTION						
Ave Vista	34	34	68	0	34	34
11th and Jackson	<u>63</u>	<u>35</u>	<u>98</u>	<u>0</u>	<u>35</u>	<u>63</u>
<i>Total Under Construction</i>	97	69	166	0	69	97
PLACED IN SERVICE						
Cathedral Gardens	57	43	100	0	43	57
Lakeside Senior Apts.	0	91	92	0	91	0
Lion Creek Crossings V	<u>0</u>	<u>127</u>	<u>128</u>	<u>0</u>	<u>127</u>	<u>0</u>
<i>Total Placed in Service</i>	57	261	320	0	261	57
REHABILITATION						
OAHPI	<u>0</u>	<u>63</u>	<u>1,554</u>	<u>0</u>	<u>1,554</u>	<u>0</u>
<i>Total Rehabilitation</i>	0	63	1,554	0	1,554	0
COMBINED TOTAL	199	407	2,099	0	1,898	199

APPENDIX E

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.

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.

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.

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.

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.

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

TANF – Temporary Assistance to Needy Families. A federal assistance program 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.