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AGENCY COUNSEL
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**REDEVELOPMENT AGENCY
OF THE CITY OF OAKLAND**

RESOLUTION NO. 2004-68 C.M.S.

**A RESOLUTION ADOPTING THE 2004-2009
IMPLEMENTATION PLAN FOR THE COLISEUM AREA
REDEVELOPMENT PROJECT**

WHEREAS, Section 33490 of the California Community Redevelopment Law (Health & Safety Code Section 33000, et seq.) requires a redevelopment agency to adopt an implementation plan every five years; and

WHEREAS, the Agency Administrator has prepared and presented to the Agency a five-year Implementation Plan for the Coliseum Area Redevelopment Project for 2004-2009; and

WHEREAS, the Agency has held a public hearing and received comment on the proposed Implementation Plan; and

WHEREAS, the proposed Implementation Plan as presented to the Agency sets forth the specific goals and objectives for the Coliseum project area, the specific programs, projects and estimated expenditures over the next five years, and an explanation of how the goals, objectives, programs, projects, and expenditures will eliminate blight within the project area and meet low- and moderate-income housing requirements, as required by law; now, therefore, be it

RESOLVED: That the Agency hereby approves and adopts the 2004-2009 Implementation Plan for the Coliseum Area Redevelopment Project attached to this Resolution as Attachment A; and be it further

RESOLVED: That the Agency Administrator or her designee is hereby authorized to take whatever action is appropriate with respect to the Implementation Plan consistent with this Resolution and its basic purposes.

IN AGENCY, OAKLAND, CALIFORNIA, DEC 7 2004, 2004

PASSED BY THE FOLLOWING VOTE:

AYES- BROOKS, BRUNNER, CHANG, NADEL, QUAN, REID, WAN, AND CHAIRPERSON DE LA FUENTE, 8

NOES- 0

ABSENT- 0

ABSTENTION- 0

ATTEST: CEDA FLOYD
CEDA FLOYD
Secretary of the Redevelopment Agency
of the City of Oakland

ATTACHMENT A

COLISEUM AREA REDEVELOPMENT PROJECT FIVE-YEAR IMPLEMENTATION PLAN 2004-2009

I. BACKGROUND AND INTRODUCTION

The Coliseum Area Redevelopment Plan was adopted on June 23, 1995 (Ordinance Number 11824 C.M.S.), and later amended on July 22, 1997 (Ordinance Number 12001 C.M.S.) to include an additional 680 acres in the San Antonio district of Oakland. The redevelopment plan documents, including the Implementation Plan, were developed with considerable community input, led by the Coliseum Area Redevelopment Advisory Committee (CARAC), comprising representatives from the business, residential, faith and non-profit communities.

The Coliseum Redevelopment Project Area includes 6,764 acres bounded by 22nd Avenue, International Boulevard, the Oakland-San Leandro city border, and the Oakland International Airport and the Estuary. Approximately 75 percent of the total Project Area consists of commercial, industrial, and airport related uses with the remaining 25 percent of the total Project Area residential.

The principal objectives of the Coliseum Area Redevelopment Plan are the abatement of physical and economic blight through the redevelopment of vacant and underutilized properties and the replacement of obsolete infrastructure. The Coliseum project program addresses six target areas of activity:

- the Coliseum Shoreline project;
- the Fruitvale BART Station area;
- the Hegenberger Gateway/Oakland Airport area;
- the Coliseum BART Station Area;
- the Neighborhood Improvement Program, an expanded focus on neighborhood capital projects; and
- the International Boulevard Infill area.

Since the Coliseum Area Redevelopment Plan was first adopted in 1995, the Redevelopment Agency has funded or otherwise supported a number of actions called for in the earlier Implementation Plans. These actions include:

- Completion of the Fruitvale Transit Village project, which includes key tenants such as La Clinica de la Raza, the Cesar Chavez Branch Library, the Oakland Multipurpose Senior

Center and a retail courtyard of 38,000 square feet around the 34th Avenue Paseo, now known as Avenida de la Fuentes.

- Coordinated the completion of the conveyance and construction of the OUSD Cesar Chavez Education Center housing a kindergarten and early education program, two elementary schools and a junior high school.
- Completion of the Jingletown Housing Development – for sale units for first time homebuyers.
- Completion of the Las Bougainvilleas Senior Housing Development – 64 rental units for low income seniors.
- Completion of the Fruitvale Station Shopping Center, 160,000 square feet on 13 acres.
- Created the Security Enhancement Program, which funds overtime costs for extra police patrols in the commercial/industrial areas on nights and weekends.
- Secured funding for construction of a Coliseum InterCity Rail Platform for about \$6 million.
- Completed two major roads of the Airport Gateway Streetscape Improvements as part of the Airport Gateway Urban Design Concept, the Hegenberger Road and the 98th Avenue Streetscape Improvements as part of the Airport Roadway project.
- Worked with the City of San Leandro to coordinate the design of the Airport Gateway Doolittle Drive Streetscape and with the Public Works Agency to develop the conceptual design for the Airport Gateway Airport Access Road Streetscape and Hegenberger East Streetscape Design.
- Developed a new marketing program with four new neighborhood and area profiles on the Coliseum Redevelopment Project Area, the Hegenberger/ I-880 District, In-Fill Housing, and the Coliseum Auto Mile featuring the new Hendricks Automotive Group Infiniti of Oakland dealership.
- Developed the design for the Coliseum Transit Hub project on San Leandro Street to implement the MTC Transportation for Livable Communities grant.
- Developed the preliminary design for the San Leandro Street Utility Undergrounding project as part of the overall Coliseum Transit Village project.

II. GOALS AND OBJECTIVES FOR THE PROJECT AREA

The goals of the Coliseum Area Redevelopment Plan are as follows:

- A. Stimulate industrial, R&D and commercial development by improving obsolete, under-utilized and vacant properties.
- B. Provide long-term job training and employment opportunities for residents.
- C. Eliminate land use conflicts between the residential and industrial edge.
- D. Improve public safety for people living and working in the area.
- E. Improve the quality of the residential environment by assisting new construction, rehabilitation, and conservation of living units in the area.

- F. Stimulate home ownership opportunities.
- G. Improve transportation, public facilities and infrastructure in residential, commercial and industrial areas.
- H. Assist neighborhood commercial revitalization.
- I. Attract new and retain existing businesses.

III. PROJECTS AND EXPENDITURES PROPOSED FOR THE NEXT FIVE YEARS

The following table outlines the projected tax increment revenue for the Coliseum Area Redevelopment Project over the five-year period of this Implementation Plan. The figures assume a 2% average growth in tax increment revenue over the 2004 assessed property valuation within the Project Area. The revenues stated for the last four of the five years proposed, FY 2005-09, are projections *only* and are contingent upon specific Council authorizations at a later date.

The total projected net tax increment revenue that will be available during the FY 2004-09 period is estimated to be \$994,000. The total projected housing fund revenue is estimated to be \$17,523,000.

Projection of Tax Increment Revenue
FY 2004-09
(\$'000s)

	FISCAL YEAR					TOTAL
	2004-05	2005-06	2006-07	2007-08	2008-09	2004-09
Gross Tax Increment Revenue	13,468	13,738	14,013	14,293	14,578	70,090
Housing Set Aside Requirement	(3,367)	(3,435)	(3,503)	(3,573)	(3,645)	(17,523)
AB 1290 Pass-Through *	(2,694)	(2,748)	(2,803)	(2,859)	(2,916)	(14,020)
State Education Funds (ERAF)	(1,191)	(1,215)	0	0	0	(2,406)
School Set Aside	(606)	(618)	(631)	(643)	(656)	(3,154)
Debt Expenditures	(1,497)	(1,497)	(1,450)	(1,497)	(1,497)	(7,438)
Personnel	(3,038)	(3,494)	(4,017)	(4,500)	(5,040)	(20,089)
Other O&M	(741)	(815)	(897)	(968)	(1,045)	(4,466)
Total Expenditures	(13,134)	(13,822)	(13,301)	(14,040)	(14,799)	(69,096)
Net Tax Increment Revenue	334	(84)	712	253	(221)	994

*AB 1290 set-aside does not include second tier adjustments for years 2005-2009

The list below summarizes the total tax increment revenue and expenditures for the Coliseum area focusing on the totals over the five-year Implementation Plan period:

- \$1.0 million in net tax increment for Coliseum projects and redevelopment programs.

- \$24.5 million in personnel and other activities.
- \$17.5 million for the Low and Moderate Income Housing Fund.
- \$14 million for other taxing agencies under the AB 1290 distribution formula.
- \$7.4 million in debt service.
- \$2.4 million in payments to the state Educational Revenue Augmentation Fund.
- about \$3.2 million in funds set-aside for the Oakland Unified School District.

**Coliseum Redevelopment Area FY 2003-04 Capital Projects
Mid Year Budget Status Summary 2004**

	Budget	Spent/Committed	Funds Available
Coliseum Shoreline Area			
Zhone Technologies Campus	12,404	-	12,404
Coliseum Shoreline Project - Loan Repayment	3,600,000	3,600,000	-
Subtotal	\$ 3,612,404	\$ 3,600,000	\$12,404
Fruitvale Area			
Fruitvale BART Transit Village	4,400,000	4,400,000	-
29th Avenue Gateway Streetscape Improvements	150,000	150,000	-
Subtotal	\$ 4,550,000	\$ 4,550,000	-
Hegenberger / Airport Gateway			
Airport Gateway - Airport Access Road	1,208,835	1,208,835	-
Airport Gateway - Doolittle	750,000	750,000	-
Airport Gateway - Hegenberger Road	292,921	80,000	212,921
Airport Gateway - 98th Avenue	1,228,141	1,228,141	-
Airport Connector Intermediate Station Design	1,000,000	-	1,000,000
Hegenberger East Gateway Streetscape	900,000	900,000	-
Subtotal	\$5,379,897	\$4,166,976	\$1,212,921
Coliseum BART Station Area			
Coliseum InterCity Rail Platform	1,729,000	1,729,000	-
Coliseum Transit Hub Streetscape Improvements	130,000	130,000	-
San Leandro Street Utility Under- grounding	1,670,000	1,670,000	-
Coliseum Gardens HOPE VI - Infrastructure	4,000,000	4,000,000	-
Coliseum BART Station Area Plan	18,700	-	18,700
Coliseum Complex / BART Area Site Assembly	40,000	-	40,000
Subtotal	\$7,587,700	\$7,529,000	\$58,700
Neighborhood Improvements and Other Catalyst Projects			
Railroad Avenue Street Improvement	1,000,000	1,000,000	-
Technology Incubator Project	1,610,000	1,610,000	-
Neighborhood Commercial Revitalization	104,612	104,612	-
Coliseum Capital Project Support:			-
Coliseum Shoreline	107,859	15,451	92,408
I-880 Industrial Strategy	31,230	27,650	3,580
Master Plan	1,364	-	1,364
Subtotal	\$2,855,065	\$2,757,713	\$97,352
GRAND TOTAL	\$23,985,066	\$22,603,689	\$1,381,377

In addition to the tax increment forecast estimate there is redevelopment funding remaining of about \$22.6 million in tax allocation bond and capital funding balances from prior years, which will be spent on about nine capital projects and one new neighborhood program over the remaining two years, 2004-2006. The summary of the project expenditures by project area group include:

- Over 99% of the funds for the Coliseum Shoreline capital project were expended.
- All of the funds for the Fruitvale area were expended including the Fruitvale Village and 29th Avenue Gateway project funds.
- Over 77% of funding for the Airport Gateway projects were committed or expended.
- Over 99% of funding for the Coliseum BART Station area were committed or expended.
- Over 96% of funds for the Neighborhood Improvement and Catalyst Projects were committed or expended.
- Overall 94% of funds for the Coliseum Capital program were committed or expended in 2003-04.

As set forth in the planning process future expenditures are allocated on a percentage basis across various categories of investment. The projected budget is based on tax increment growth estimates made in the 2004 and calculated to grow at 2% per year and project but one scenario of growth. Actual tax increment growth may vary from these estimates over the years.

The \$24 million available for capital project and program expenditures has been drawn down during fiscal years FY 2003-2004 and the remaining balance is expected to be spent from FY 2004-2006 with an emphasis on implementing projects planned in earlier years. These project expenditures will largely be aimed toward improving transportation and infrastructure, improving obsolete and underutilized properties, and furthering the transit village development in the neighborhoods surrounding the Coliseum and Fruitvale BART stations. Additional investments will be made to improve security, improve linkages between area employers and potential area employees, retain and attract business, and revitalize neighborhood residential and commercial areas throughout the redevelopment project area.

FUTURE EXPENDITURES (FY 2004-09)

<u>Project and Goals</u>	<u>Funding Level</u>
<ul style="list-style-type: none"> • Marketing and Economic Development Programs (1%) <i>Goals E, H</i> 	\$700,900
<ul style="list-style-type: none"> ▪ Improve Public Safety (2%) <i>Goal C</i> 	\$1,401,800

• Improve Public Transportation, Facilities and Infrastructure (38%) <i>Goals F, G, & H</i>	\$26,634,200
• Stimulate Development by Improving Obsolete, Underutilized and Vacant Properties (35%) <i>Goals G, I</i>	\$24,531,500
• Neighborhood Improvement and Revitalization (18%) <i>Goals C, G, H</i>	\$12,616,200
• Other Brownfield, Neighborhood programs (5%) <i>Goals D, E. & G</i>	\$3,504,500
• <u>Business Retention (1%) <i>Goal I</i></u>	<u>\$700,900</u>
Total Projected Expenditures for FY 2004-09	\$70,090,000

IV. HOW GOALS, OBJECTIVES, PROJECTS AND EXPENDITURES WILL ELIMINATE BLIGHT

Coliseum Redevelopment Project Area Five-Year Spending Plan for FY 2004-09

The Coliseum Redevelopment tax allocation bond and tax increment revenue will provide funds to complete the plans, capital projects and programs during the next five years. These projects will mitigate the physical and economic blight to assist in the revitalization of the Coliseum Project Area and include:

- Supporting transit villages at both the Coliseum and Fruitvale BART station areas.
- Design and installation of infrastructure projects for:
 - ❖ the Coliseum Transit Hub along San Leandro Street
 - ❖ the Airport Gateway along Doolittle Drive and Airport Access Road
 - ❖ the Hegenberger East streetscape and
 - ❖ Railroad Avenue.
- Implementing the Coliseum Transit Oriented Development Concept Plan at the Coliseum BART Station area.
- Funding the completion of design and construction gaps for the Coliseum Intercity Amtrak Rail Platform and supporting the Oakland Airport Connector project.
- Contributing a subdivision infrastructure grant to the Coliseum Gardens Hope VI Project.
- Creating a new program to contribute to Neighborhood Improvement in the Project Area.

The Coliseum Redevelopment Project Area will use catalyst development projects, infrastructure and transportation investment and major transit village planning and investment to revitalize the Project Area. Additional public outreach to obtain community input for a new program to

support neighborhood capital projects has been conducted. In response to community input the Coliseum Area Redevelopment Project team has developed a new Neighborhood Improvement Program to support neighborhood capital projects for both residential and commercial districts of the Project Area. The new emphasis on neighborhood projects will complement the large scale project efforts and balance the investment pattern as well.

The leading indicators of blight in the Coliseum Redevelopment Project Area include obsolete and underutilized land, poor transportation circulation and connections, and lack of private investment. Staff plans to continue the strategies developed with the business and neighborhood communities in the Project Area to correct these blighting factors including:

- public expenditures to improve roadways and intermodal transportation opportunities,
- improve underutilized properties and incompatible uses by assisting with environmental assessments, clean-up, land assembly and screening,
- improve security in the Project Area, and
- stimulate private investment in the neighborhoods, commercial and industrial areas throughout the Coliseum Redevelopment Project Area.

V. HOW GOALS, OBJECTIVES, PROJECTS AND EXPENDITURES WILL FULFILL THE LOW/MODERATE INCOME HOUSING REQUIREMENTS

A. Implementation Plan Requirements

This Housing Component of the Implementation Plan is required by Article 16.5 of the California Redevelopment Law ("CRL") as contained in Sections 33000, *et seq.*, of the California Health and Safety Code. (All citations in this portion of the Implementation Plan are to the Health and Safety Code unless otherwise specified.)

The Housing Component presents those components of the Agency's intended program for the Project Area that deals with the expenditure of funds and activities relating to the production of housing at affordable housing cost to persons and families of low and moderate ("low-mod") income. Low income and moderate income are defined in the CRL by reference to Section 50093, which specifies the following income levels:

- Moderate income is defined as a household income from 80 percent to 120 percent of median income for the applicable household size (Section 50093);
- Low income is defined as an income from 50 percent to 80 percent of median income for the applicable household size (Section 50079.5); and
- Very low income is defined as an income less than 50 percent of median income for the applicable household size (Section 50105).

Affordable housing cost is defined in Section 50052.5 as shown in the following table. Housing cost for rental housing includes rent plus an allowance for tenant-paid utilities. Housing cost for owner-occupied housing includes principal, interest, insurance, taxes, utilities, homeowner association dues, and maintenance.

Definition of Affordable Housing Cost

Income Level	Rental Housing	Owner-Occupied Housing
Very Low Income	30% of 50% of AMI	30% of 50% of AMI
Low Income	30% of 60% of AMI	30% of 70% of AMI
Moderate Income	30% of 110% of AMI	35% of 110% of AMI, but no less than 28% of actual income

AMI = "Area Median Income," which is the Median Family Income, adjusted for family size, for the metropolitan area (Alameda and Contra Costa Counties combined), as determined by the U.S. Department of Housing and Urban Development

The CRL provides that, in addition to the removal of blight, a fundamental purpose of redevelopment is to expand the supply of low-mod housing (Section 33071). To accomplish this purpose, the CRL contains numerous provisions to guide redevelopment agency activities with regard to low-mod housing. These provisions divide a redevelopment agency's housing responsibilities into three major categories:

- The production and/or replacement of low-mod housing depending upon activities undertaken by an agency within its project areas;
- The set-aside and expenditure of specified amounts of tax increment revenue for the express and exclusive purpose of increasing and improving the community's supply of low-mod housing; and
- Preparing reports on how the agency has met, or preparing plans on how the agency will meet its responsibilities with regard to the first two items.

This Housing Component is part of the Agency's responsibilities under the third major category. Its contents address how the Agency's plans for the project area will achieve many of the housing responsibilities contained in the first and second major categories of Agency housing activities. Article 16.5 requires that the housing portion of an Implementation Plan address the applicable items presented in the list below:

1. Production of Housing Based on Activities in the Project Area:

- The requirement that, for certain project areas, at least 30 percent of all new and substantially rehabilitated dwelling units developed by a redevelopment agency over a 10-year period must be available at affordable housing cost to persons and families of low and moderate income, and must be occupied by these persons and families (Section

33413(b)(1)). At least 50 percent of these units must be available to very low income households.

- The requirement that, for certain project areas, at least 15 percent of all new residential units dwelling units developed within a project area under the jurisdiction of an agency by public or private entities or persons other than the agency over a 10-year period must be available at affordable housing cost to persons and families of low or moderate income, and must be occupied by these persons or families (Section 33413(b)(2)). At least 40 percent of these units must be available to very low income households.
- The requirement that, for certain project areas, at least 15 percent of all substantially rehabilitated units that have received agency assistance over a 10-year period must be available at affordable housing cost to persons and families of low or moderate income, and must be occupied by these persons or families (Section 33413(b)(2)(iii)). At least 40 percent of these units must be available to very low income households.
- The requirement that an agency must replace, on a one-for-one basis, all units destroyed or removed from the low and moderate income housing stock caused by agency activities in a project area, within four years of the destruction or removal (Section 33413(a)). Suitable locations must be identified for replacement housing units rehabilitated, developed or constructed pursuant to Section 33413(a), if the destruction or removal of low-mod units will result from a project contained in the implementation plan.

2. Set-Aside and Expenditure of Tax Increment for Housing Purposes:

- The requirement to set-aside at least 20 percent of tax increment revenue into a Low and Moderate Income Housing Fund to increase, improve, and preserve the community's supply of low-mod housing at an affordable housing cost (Sections 33334.2 and 33334.6).
- The proportional expenditure of Low and Moderate Income Housing Funds on moderate, low, and very low income housing and family housing (Section 33334.4).
- The transfer of housing funds to other public entities producing housing in the community (a possible outcome of the provisions of Sections 33334.12 et seq.).

3. Additional Requirements:

- Estimates of the balances and deposits into the Low and Moderate Income Housing Fund.
- A housing program identifying expenditures from the Low and Moderate Income Housing Fund.
- An indication of housing activity that has occurred in the project area.

- Estimates of housing units that will be produced in the project area for each of the various income categories.

B. Applicable Low and Moderate Income Housing Requirements

1. Applicable Housing Production Requirements

The date of adoption of the redevelopment plan, the existence of low-mod housing units, and the potential for residential development are the primary determinants of the legal and practical applicability of the various housing provisions of the CRL. Only the low-mod housing provisions applicable to the Coliseum Project Area are discussed below:

a. Replacement Housing Obligation:

In connection with the Coliseum Gardens project, which will be assisted by the Agency, 178 units of housing affordable to very low income households will be demolished. The Agency has adopted a Replacement Housing Plan that specifies that 167 units will be replaced with comparable new units to be built on the project site. An additional 11 units of replacement housing will be provided in the Mandela Gardens development, located at 1364 and 1420 7th Street in West Oakland.

b. Housing Production Obligation:

The Agency is required to comply with the housing unit production requirement of Section 33413(b). Subparagraph (1) of the Section requires that 30 percent of all housing units developed by the Agency be affordable to low-mod persons. The Agency does not plan to develop housing in the next five years, rather the Agency will assist in private sector affordable housing development. Thus, the Agency is not anticipated to incur any obligations under this provision of the CRL.

The Agency will assist the private sector in developing affordable housing and it is possible that there will be some residential infill within the Project Area that is not Agency-assisted. As a result, the Agency will need to create low-mod housing in order to comply with the provisions of subparagraph (2) of Section 33413(b). Subparagraph two requires that 15 percent of all housing developed in the Project Area (inclusive of restricted units) be low-mod housing. Of these low-mod units, at least 40 percent must be affordable to persons and families of very-low income.

To determine the number of units that must be developed in order to comply with this requirement, and to identify how much of this requirement will be satisfied by the activities included in this Implementation Plan, a brief review of past and anticipated housing development activity in the Project Area is presented below.

(1) Housing Construction Activity in the Project Area Prior to 2004:

From the inception of the Project Area in 1995 through 2004, 668 units of housing have been newly constructed or substantially rehabilitated. In addition to the affordable projects listed below, there have been a number of significant market-rate developments, including the 265-unit Durant Square project and the Fruitvale Transit Village, which included 37 market-rate units in addition to 10 affordable units.

(2) Estimate of Future Housing Construction Activity in the Project Area:

The Agency estimates that over the next 10 years, an additional 1,400 units will be developed in the Project Area, as follows:

Project Name	Units	Type	Year
Estuary Project	100	Families	2005
Ford St. Lofts	81	Families	2005
Coliseum Gardens	383	Families	2007
Coliseum Transit Village	502	Families	2009
Seven Directions	38	Families	2005
Fruitvale Transit Village	47	Families	2004
Derby Live/Work	34	Families	2005
Pulte Homes	365	Families	2006
Scattered Site Infill/Undetermined	215		
TOTAL	1,765		

(3) Estimated Number of Units Required for Housing Production Obligation

The Agency's housing production obligation is based on the number of units already constructed plus those units expected to be constructed in the next ten years. This will be a total of 2,433 units. At least 15 percent of the units (365 units) must be affordable to very low, low and moderate income households. At least 40% of those units, which equates to 146 units, must be restricted to very-low income households.

(4) How the Housing Production Obligation Will be Met

The following illustrates how the housing production obligations will be fulfilled:

Project Name	Units	Type	Year	Affordability Level			
				Very Low	Low	Mod	Above Mod
Allen Temple Gardens	50	Seniors	2001	49	0	0	1
Allen Temple Manor	24	Disabled or HIV/AIDS	2001	23	0	0	1
Coliseum Gardens Phase I	115	Families	2005	91	22	0	2
Coliseum Gardens Phase II	129	Families	2006	39	90	0	0
Coliseum Gardens Phase III	106	Families	2007	32	74	0	0
Edes Avenue Homes	26	Homeownership	TBD	0	26	0	0

Fruitvale Transit Village	47	Families	2004	3	7	0	37
Habitat for Humanity	3	Homeownership	2001	0	3	0	0
Habitat Village	40	Homeownership	2001	0	40	0	0
International Blvd Family Housing	30	Families	2002	4	25	0	1
Las Bougainvilleas	67	Senior	1998	67	0	0	0
Paul Wang (2003 DDA)	1	Homeownership	2004	0	1	0	0
Paul Wang II	2	Homeownership	2004	0	2	0	0
Paul Wang II	1	Homeownership	2004	0	1	0	0
Paul Wang II	1	Homeownership	2004	0	0	0	1
Seven Directions	38	Families	TBD	24	13	0	1
Stanley Avenue Apartments	24	Families	2003	23	0	0	1
TOTAL	704			355	304	0	45

Based on these projections, the Agency will exceed its production obligation, as shown below.

Housing Production Requirement	Very Low/Low/Moderate (15% of all production)	Very Low (40% of affordable units)
Total Units Required	365	146
Estimated Production	704	355
Total Surplus (Deficit) Units	339	209

It should be noted that all of the affordable units will be located in the Project Area and therefore can be counted on a one-for-one basis toward the production obligation. To the extent that more affordable units are produced than are required, the excess can be applied, on a two-for-one basis, toward production requirements in other Project Areas.

2. Applicable Provisions Regarding Low and Moderate Income Housing Set-Aside

a. Set-Aside of Tax Increment

The Agency must comply with the Section 33334.2 and 33334.6 requirement to allocate at least 20 percent of the gross tax increment to affordable housing activities. The set-aside is required to be deposited into a Low and Moderate Income Housing Fund created to hold the monies until expended.

However, the Redevelopment Agency has adopted a policy by resolution that 25 percent of all tax increment revenue from each project area be allocated to the Low and Moderate Income Housing Fund, if certain conditions are met. The projections of deposits into the Low and Moderate Income Housing Fund from the Coliseum Project Area that are included in the following section assume that the full 25 percent set-aside will be deposited into the Low and Moderate Income Housing Fund in each of the years covered by this Implementation Plan.

b. Proportional Expenditures of Housing Fund Monies

The Coliseum Project Area is subject to the Section 33334.4 requirement that the Agency expend Low and Moderate Income Housing Fund monies in accordance with an income proportionality test and an age restriction proportionality test. These proportionality tests must be met every ten years through the termination of the Project Area life. These tests do not have to be met on an annual basis.

(1) Very Low and Low Income Housing Expenditures

The income proportionality test requires the Agency to expend Low and Moderate Income Housing Funds in proportion to the housing needs that have been determined for the community pursuant to Section 65584 of the Government Code. The proportionality test used in this Implementation Plan is based on the 2000 Regional Housing Needs Assessment (RHNA) prepared by the Association of Bay Area Governments. Based on the 2000 RHNA for the City of Oakland, the Agency’s minimum required allocation for very low and low income expenditures, and maximum moderate income housing expenditures are:

Category	RHNA	Threshold
Very Low Income	2,238	At least 43%
Low Income	969	At least 19%
Moderate Income	1,959	No more than 38%
Total	5,166	

Section 33334.4 requires that at least 43 percent of the Low and Moderate Income Housing Fund monies from the Coliseum Project Area dedicated to projects and programs be spent on housing for very low income households. In addition, at least 19 percent of these funds must be spent on housing for low income households, and no more than 38 percent of the funds can be spent on moderate income households. However, the Agency is entitled to expend a disproportionate amount of the funds for very low income households, and to subtract a commensurate amount from the low and/or moderate income thresholds. Similarly, the Agency can provide a disproportionate amount of funding for low income housing by reducing the amount of funds allocated to moderate income households. In no event can the expenditures targeted to moderate income households exceed the established threshold amount.

The Agency will allocate Coliseum Low and Moderate Income Housing Funds in such a way that these percentages are met over the ten-year period from 2004 through 2014. In addition, the City and other entities may provide assistance for the construction of units affordable to very low and low income households that may also be counted toward meeting the requirements of Section 33334.4.

(2) Age Restricted Housing Expenditures

Section 33334.4 also requires that the Agency assist housing that is available to all persons, regardless of age, in at least the same proportion as the population under age 65 bears to the City's total population as reported in the most recent census of the United States Census Bureau. The 2000 Census indicates that 89.5 percent of the City's population is under 65 years of age. As such, at least 89.5 percent of the Agency expenditures on affordable housing projects from Low and Moderate Income Housing Fund monies from the Coliseum Project Area must be spent to assist projects that do not impose age restrictions on the residents. The following summarizes the allocation of Low and Moderate Income Housing Fund monies.

Age Category	Percentage of Funds
Senior	10.5% Maximum
Unrestricted	89.5%
Total	

The Agency will ensure that over the ten-year period from 2004 through 2014, not more than 10.5 percent of its expenditures on affordable housing projects from Low and Moderate Income Housing Fund monies from the Coliseum Project Area are for projects that exclusively serve seniors.

c. Transfer of Housing Funds to Other Providers

The Project Area is subject to the CRL provisions requiring the transfer of housing funds to other housing producers in the Oakland area in certain circumstances. Such transfers could possibly occur if the Low and Moderate Income Housing Fund contains "excess surplus." Excess surplus means any unexpended and unencumbered amount in a project area's Low and Moderate Income Housing Fund that exceeds the greater of \$1,000,000 or the aggregate amount deposited into the Low and Moderate Income Housing Fund during the project's preceding four fiscal years.

The Agency does not anticipate having an excess surplus during the current Implementation Plan cycle or throughout the subsequent remaining Coliseum Project life.

3. Housing Goals and Objectives of the Implementation Plan

The primary goal of the Agency is to comply with the affordable housing requirements imposed by the CRL in a responsible manner. The affordable housing activities identified in this Implementation Plan will explicitly assist in accomplishing the intent of the CRL in regards to the provision of low-mod housing.

The CRL establishes that certain housing expenditures, and preservation and production requirements, be attained during five and ten year increments. The housing production

requirement, if applicable, must be met every 10 years, while the proportionality tests must be achieved over the next 10 years, and then again through the end of the Project life. It is the Agency's goal and objective for this Implementation Plan to accomplish sufficient activity and expenditures over the Implementation Plan term, and through the remaining term of the Project, to comply with the applicable requirements.

4. Estimated Housing Fund Revenues and Expenditures

The following table presents the projected future deposits into the Low and Moderate Income Housing Fund from the Coliseum Project Area. As shown below, \$17,522,000 in revenues are projected to be available over the five-year term of this Implementation Plan.

**Estimate Housing Set-Aside Revenue
2004-2009
(\$'000s)**

Plan Year	Fiscal Year	Housing Set Aside
1	2004-05	\$3,367
2	2005-06	\$3,434
3	2006-07	\$3,503
4	2007-08	\$3,573
5	2008-09	\$3,645
Total		\$17,522

5. Anticipated Housing Program Activities

The Agency may assist in a variety of programs to increase, improve and preserve affordable housing in the Project Area or the City of Oakland, such as the following:

b. Production

The Agency can make loans and grants from the Low and Moderate Income Housing Fund to non-profit and for-profit developers for the new construction or rehabilitation of affordable housing. Loans can be made on a deferred payment and/or below market interest rate basis.

The Agency can also participate in land acquisition, land cost write-down, developer recruitment, credit enhancement, and other participation to cause affordable housing to be developed. This is normally accomplished after identification of a housing site, development of a housing concept, and issuance of a Request for Proposals for development of housing. Such affordable housing could be rental or ownership housing. The Agency may also acquire land and directly build housing.

c. Rehabilitation

The Agency may offer low-interest or no-interest loans or grants to assist low- and moderate income homeowners in making repairs to existing residences. Such repairs could consist of correcting health and safety violations, re-landscaping, and re-painting. This preserves the affordability of the housing and extends its lifespan, as well as improving the neighborhood. Additionally, such programs can be extended to owners of rentals properties to make repairs to affordable rental housing. In either case, covenants must be recorded to keep these properties affordable for the time period required by the CRL.

d. Affordability Assistance

The Agency may provide direct subsidies to lower the cost of producing housing or first-time homebuyer programs to assist very-low to moderate income families with mortgage assistance for the purchase of a home. The latter can take the form of a deferred loan with a low interest rate and equity sharing provisions. When the home is sold, the loan and equity share would be used to help another first-time homebuyer.

e. Preservation of Existing Affordable Housing

The Agency may offer loans, grants or other forms of investment to assist in the preservation of existing assisted housing that is otherwise threatened with conversion to market rate. Such assistance would be coupled with affordability restrictions of 55 years for rental housing and 45 years for owner-occupied housing.

6. Allocation of Housing Funds over Previous Implementation Period

While Agency housing set-aside funds are tracked individually for each project area, the funds from all of the Agency's project areas are combined into a single Low and Moderate Income Housing Fund. The Agency has made findings that affordable housing activities in any part of the City of Oakland are of benefit to all of the redevelopment project areas. As a result, Low and Moderate Income Housing Funds from the Coliseum Project Area may be used both inside and outside the Project Area. In addition, the City of Oakland also provides assistance from its own funds for the development, improvement and preservation of affordable housing.

The tables on the following page provides information for the period 1999-2004 regarding:

- the amounts of Low and Moderate Income Housing Fund monies utilized to assist units affordable to, and occupied by, extremely low income households, very low income households, and low income households, including units available to families with children; and
- the number, the location, and the level of affordability of units newly constructed with other locally-controlled government assistance and without Agency housing fund assistance and that are required to be affordable to, and occupied by, persons of low, very low, or extremely low income for at least 55 years for rental housing or 45 years for homeownership housing.

Redevelopment Agency Assisted Housing Activities Completed or Underway, 1999 - 2004

Project Name	Type	Year Built	Project Area	Number of Units at Each Affordability Level (2)				Agency Funding (1)
				Very Low	Low	Moderate	Above Moderate	
10211 Byron	Families	Underway	Central City East	TBD	TBD	TBD	TBD	\$ 386,550
1574-1590 7th Street	Families	Underway	West Oakland	TBD	TBD	TBD	TBD	\$ 136,846
2001 Linden Street	TBD	Underway	West Oakland	TBD	TBD	TBD	TBD	\$ 148,500
3701 MLK Jr.	Families	Underway	Broadway/ MacArthur/ San Pablo	TBD	TBD	TBD	TBD	\$ 109,510
5825 Foothill	Homeownership	Underway	Central City East	TBD	TBD	TBD	TBD	\$ 701,000
Adeline Lofts	Families	2002	West Oakland	31	6			\$ 70,179
Allen Temple Gardens	Seniors	2001	Coliseum	49			1	\$ 1,951,000
Altenheim Phase I	Senior	Underway	None	66			1	\$ 1,778,560
Calaveras Townhomes	Homeownership	Underway	None				28	\$ 3,858,500
Casa Velasco	Seniors	2003	Central City East	20				\$ 908,000
Chestnut Court Ownership	Homeownership	2003	Oak Center and none		15			\$ 1,727,000
Chestnut Court Rental	Families	2003	Oak Center		71		1	\$ 2,976,000
Coliseum Gardens Phase I	Families	Underway	Coliseum	91	22		2	\$ 1,500,000
Courtyards at Acorn	Families	2000	Acorn		87			\$ 604,500
CURA-North	Disabled or HIV/AIDS	2001	None	8				\$ 587,876
Drachma	Families	2003	West Oakland	19				\$ 1,712,000
Eastmont Court	Disabled or HIV/AIDS	Underway	Central City East	18			1	\$ 1,427,000
Edes Avenue Homes	Homeownership	Underway	Coliseum		26			\$ 2,075,000
Effie's House	Families	1999	None	4	16			\$ 225,000
Faith Housing	Families	Underway	West Oakland	TBD	TBD	TBD	TBD	\$ 689,598
Habitat Fruitvale Homes	Homeownership	2003	None		4			\$ 112,000
Habitat Village	Homeownership	2001	Coliseum		40			\$ 981,048
Horizon Townhomes	Homeownership	Underway	Central City East		4	10		\$ 1,767,000
Irene Cooper Terrace	Seniors	2000	Central City East	39			1	\$ 560,000
Lake Merritt Apartments	Senior	2004	Central City East	11	43		1	\$ 1,900,000
Leola Terrace II	Homeownership	Underway	Central City East		8			\$ 200,000
Lincoln Court	Senior	Underway	None	24	57			\$ 2,000,000
Linden Court Rental	Families	2003	West Oakland		78		1	\$ 3,224,000
Madison Lofts	Families	Underway	Central District	TBD	TBD	TBD	TBD	\$ 1,498,000
Mandela Gateway Ownership	Homeownership	Underway	West Oakland		8	6		\$ 1,146,100
Mandela Gateway Rental	Families	Underway	West Oakland	95	71		2	\$ 2,500,000
MLK MacArthur BART Sr.	Senior	Underway	Broadway/ MacArthur/ San Pablo	32			1	\$ 2,080,850
MLK Plaza Homes	Homeownership	2002	None		6	5		\$ 1,287,175
Mortgage Assistance Program	Homeownership	multiple	Citywide	51	225	11		\$11,000,000
Northgate Apartments	Families	2003	None	21	20		1	\$ 349,229
Oak Park Homes	Families	Underway	Central City East	16	18		1	\$ 3,419,000
Oak Street Terrace Senior	Senior	Underway	Central District	21	17		1	\$ 2,072,000
Oakland Point Limited Partnership	Families	2002	West Oakland	31				\$ 1,451,606

Project Name	Type	Year Built	Project Area	Number of Units at Each Affordability Level (2)				Agency Funding (1)
				Very Low	Low	Moderate	Above Moderate	
Palm Court	Homeownership	Underway	Acorn		12			\$ 855,400
Palm Villa	Homeownership	2003	None		78			\$ 6,725,000
Percy Abrams Jr. Senior	Senior	Underway	None	43			1	\$ 1,000,000
San Pablo Gateway	Homeownership	2000	Broadway/ MacArthur/ San Pablo		7	10		\$ 1,473,792
Santana	Families	2004	Central City East	30				\$ 713,000
Sausal Creek	Homeownership	Underway	None		9	8		\$ 2,329,000
Seven Directions	Families	Underway	Coliseum	24	13		1	\$ 3,289,000
Southlake Towers	Senior		Central District	26	103		1	\$ 445,300
Sylvester Rutledge Manor (North Oakland Senior)	Seniors	2003	West Oakland	64			1	\$ 2,551,750
Town Center at Acorn	Families	2000	Acorn	102	104			\$ 250,000
UniDev	Families	Underway	Citywide	TBD	TBD	TBD	TBD	\$ 25,000

(1) Agency Funding includes all funding provided from Low and Moderate Income Housing Fund over the life of the project. Some funding may have been provided prior to 1999.

(2) TBD = "to be determined" – specific affordability levels have not yet been established.

**Housing Units Newly Constructed in Redevelopment Project Areas,
Assisted With Locally-Controlled Government Assistance and
No Redevelopment Agency Housing Financing, 1999 – 2004**

Project Name	Type	Year Built	Project Area	Number of Units at Each Affordability Level (1)			
				Very Low	Low	Moderate	Above Moderate
Allen Temple Manor	Disabled or HIV/AIDS	2001	Coliseum	23			1
Bayporte Village	Homeownership	1999	Acorn		69	2	
Bishop Nichols Senior Housing (Downs)	Seniors	2003	Stanford/Adeline	16			1
Coliseum Gardens Phase II	Families	TBD	Coliseum	39	90		
Coliseum Gardens Phase III	Families	TBD	Coliseum	32	74		
Fruitvale Transit Village	Families	2004	Coliseum	3	7		34
Habitat for Humanity	Homeownership	2001	Coliseum		3		
International Blvd Family Housing	Families	2002	Coliseum and none	4	25		1
NCLT Homeownership Program	Homeownership	2003	West Oakland		4		
Paul Wang (2003 DDA)	Homeownership	2004	Coliseum		1		
Paul Wang II	Homeownership	TBD	Broadway/MacArthur				2
Paul Wang II	Homeownership	2004	Coliseum		2		
Paul Wang II	Homeownership	2004	Coliseum		1		
Paul Wang II	Homeownership	2004	Coliseum				1
Paul Wang II	Homeownership	2004	West Oakland		1		
Paul Wang II	Homeownership	TBD	West Oakland		1		
Paul Wang II	Homeownership	TBD	West Oakland				1
Pukatch Infill Project	Homeownership	TBD	West Oakland				4
RFP Site	Homeownership	TBD	West Oakland	TBD	TBD	TBD	TBD
RFP Site	Homeownership	TBD	West Oakland	TBD	TBD	TBD	TBD
Stanley Avenue Apartments	Families	2003	Coliseum	23			
Swans Market Housing	Families	1999	Central District		18		

(1) TBD = "to be determined" – specific affordability levels have not yet been established.