

**CITY OF OAKLAND
COUNCIL AGENDA REPORT**

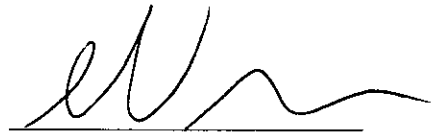
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TO: Office of the City Administrator
ATTN: Deborah Edgerly
FROM: Community and Economic Development Agency
DATE: FEBRUARY 22, 2005

RE: A PERIODIC INFORMATIONAL REPORT FROM THE OAKLAND
HOUSING AUTHORITY

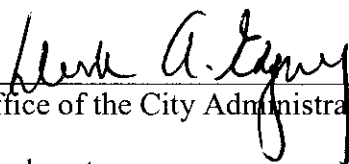
Attached for review is a periodic informational report on the current status, accomplishments and challenges of the Oakland Housing Authority.

Respectfully submitted,



DANIEL VANDERPRIEM
Director of Redevelopment,
Economic Development and Housing

FORWARDED TO
THE COMMUNITY AND ECONOMIC
DEVELOPMENT COMMITTEE:


Office of the City Administrator

Attachments

Item: _____
CED Committee
March 8, 2005



**Housing Authority
of the City of
Oakland, California**

EXECUTIVE OFFICE: 1619 HARRISON STREET
OAKLAND, CA 94612, (510) 874-1500

February 1, 2005

Deborah Edgerly
City Administrator
City of Oakland
One Frank Ogawa Plaza
Oakland, California 94612

Dear Ms. Edgerly,

I have been requested to provide a briefing to the City Council's Community and Economic Development Committee on current issues related to the Housing Authority of the City of Oakland. Enclosed with this letter is a brief written report and copies of several documents which are provided to assist the City Council by informing Council members of current programs, goals and accomplishments.

Please let me know if there are any questions that can be responded to in advance of my appearance at the committee meeting.

Thank you for your assistance.

Sincerely,

A handwritten signature in black ink, appearing to read "Jon Gresley".

Jon Gresley
Executive Director

HOUSING AUTHORITY OF THE CITY OF OAKLAND

Current status, accomplishments, and challenges:

Report prepared for the Community and Economic Development Committee –
Oakland City Council
January 31, 2005

Prepared by: Jon Gresley, Executive Director

Mission Statement of the Oakland Housing Authority:

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

The Oakland Housing Authority is the single largest provider of housing and housing related services in the City of Oakland. Through the public housing and Section 8 programs, approximately 14,000 families (33,300 individuals) are able to live in housing that is affordable. Over 80% of these families have incomes below 30% of the area median income (AMI). In fact, the great majority of families served by the Oakland Housing Authority have incomes below 20% of AMI. Only the public housing and Section 8 programs provide subsidy deep enough to adequately assist such extremely low income families. Without these two programs, many of these families would be without housing, would be doubled up in over-crowded and substandard conditions, or would be forced to pay more than they can afford for housing.

At a time when the federal government has discontinued authorizations of new Section 8 and new public housing units are no longer built, Congress continues to shrink the amount of funding for existing programs. Public housing operating subsidies and capital grants continue to be under-funded. In 2004, cuts in Section 8 funding caused repercussions throughout the country; but fortunately, Oakland escaped any loss of Section 8. However, in 2005, we have just learned that all housing authorities across the country will experience a 4% cut in Section 8 funds. (See further discussion of funding below.)

With this backdrop the Authority has had to adjust its routine public housing operations to down-size to remain fiscally responsible and has had to defer plans for capital improvements. (The Authority, in order to maintain essential services, has funded approximately half a million dollars in services from reserves in fiscal year 2004.) While we have not accomplished all that we would like, we do continue to make progress with a number of goals and new initiatives.

Since it has been more than a year since a presentation on the Oakland Housing Authority has been made to the Community and Economic Development Committee, a number of areas are highlighted in this report.

I. Board of Commissioners:

Board Chair – In June of 2004, Moses L. Mayne, Jr. was elected to serve as Chair of the Board of Commissioners for the two-year term, July 2004 to June 2006.

Board Membership – In October, 2004, Mayor Brown, with the approval of the City Council, appointed Ramon J. Terrazas, M.D. and Joe L. Brown to the Board of Commissioners. Dr. Terrazas was appointed to the four-year term that will expire June 30, 2008; and Mr. Brown was appointed to the senior resident two-year term expiring June 30, 2006. Other, continuing Commissioners include Alfred Lee, Robert J. Pittman, Jr., Jacqueline Taylor, and Richard E. Winnie.

II. New initiatives:

Homeownership – Authority efforts to encourage homeownership continue on multiple fronts.

- Seventeen (17) homes have been sold to former public housing residents, former Section 8 clients and other first-time homebuyers as a part of the Authority's Chestnut/Linden Court HOPE VI developments. Fifteen of these houses were constructed with the assistance of City of Oakland and Oakland Housing Authority funds. One additional house is expected to be sold in the coming months.
- Fourteen (14) town-homes are planned to be constructed as a part of the Authority's Mandela Gateway HOPE VI development near the West Oakland BART station later this year. As with the Chestnut/Linden Court homeownership program, these homes are jointly funded by the City of Oakland and the Authority.
- Currently, more than 160 Section 8 client families are preparing for homeownership through the use of their Section 8 vouchers. To date, four mortgage loans have been closed (and one is currently in process) to permit Section 8 clients to purchase homes in Oakland.

Family Self-Sufficiency and Employment – Since the program began over five years ago, 591 Section 8 families have participated in the Family Self-Sufficiency (FSS) Program. Under FSS, participating families set goals in areas such as education, training, and employment; and any increase in housing payment resulting from increased earnings is set aside in an escrow account. Upon attainment of goals, the escrow is made available to the family for homeownership down payment or other expenses. Nearly eighty (80) families have graduated, and of these, thirty (30) have purchased houses. Currently, 326 families are in the program with average escrow balances of \$4000. The highest family escrow balance exceeds \$18,000.

For Calendar year 2004, the Authority assisted 95 public housing residents (older youth and adults) to obtain employment. Employment was arranged through the Authority's network including the Mayor's summer job program, the Workforce Investment Board (WIB) partnerships and contractors doing business with the Authority.

Making Transitions Work - At the end of March 2004, the Oakland Housing Authority executed an agreement to participate in the Congressionally authorized "Moving to Work" demonstration program. Moving to Work (MTW) is a demonstration program of the U.S. Department of Housing and Urban Development (HUD) allowing a select few public housing authorities to test locally-designed housing and self-sufficiency strategies for low-income families. In Oakland, the program was given the name "Making Transitions Work."

The goals of MTW are to:

- Promote self-sufficiency among assisted families,
- Achieve programmatic efficiency and reduce the Authority's costs,
- Increase housing choice for low-income households.

The Authority is one of approximately 30 housing authorities selected to be an MTW agency. Starting July 1st, 2004, HUD granted OHA the authority to waive certain federal regulations for seven years so as to develop and administer programs and policies of OHA's own design. During the seven-year term of the agreement, the Authority will benefit from more flexible use of its federal funding while being granted the opportunity to adopt policies and practices designed to better meet the needs of our local community. At this early stage of our participation, we have only begun to consider options for local policy development. The Authority's activities, policy development and funding are outlined each year in an annual plan. Copies of our current annual plan are enclosed with this report.

Project-Based Contract Administration – A subsidiary non-profit corporation, created by the Authority, was recently selected by the U.S. Department of Housing and Urban Development to provide contract administration for project-based Section 8 at nearly 600 properties with nearly 40,000 units throughout northern California. To accomplish this work, the Authority formed *Californian Affordable Housing Initiatives (CAHI)* which, in turn, has partnered with a private, for-profit business. This enterprise began operation last summer and began administering the first batch of contracts on October 1, 2004. This enterprise has added a new business and thirty (30) new jobs to Oakland.

III. **Capital Improvements:**

Each year, the Authority receives a Capital Grant from the U.S. Department of Housing and Urban Development (see discussion of funding below).

Lockwood Gardens: Lockwood Gardens received our first HOPE VI grant which funded the replacement of the community building and the rehabilitation of the first of three phases. Phases II and III are being completed with Capital Grant funds. Phases I and II are now complete and phase III is in progress with expected completion later this year.

Scattered site Major Capital Improvements: With the completion of capital improvements and the revitalizations of most of the Authority's larger sites, the Authority is now turning to place emphasis on investment in its 254 scattered sites. (As noted below, the Authority has demolished a total of 307 apartments at Chestnut Court, 1114 14th Street, Westwood Gardens, and Coliseum Gardens, and is in the process of replacing all of these apartments. To date, the Authority has made comprehensive improvements to Campbell Village - 154 apartments, Peralta Villa - 390 apartments, Lockwood Gardens - 372 apartments, Palo Vista Gardens - 100 apartments, and a total of twelve scattered sites with 171 apartments). The three most recent of these scattered sites to have been renovated and re-occupied are:

- 5825 Canning
- 2202 Mitchell Street
- 2005 E. 21st Street

West Oakland Multi-Purpose Building: A new facility, which will house the west Oakland housing management functions, the Resident and Community Services Department and satellite offices for Facilities Management and Police along with space for community programs and activities is about to open at 935 Union Street.

Painting and landscaping of scattered sites during 2004: Not all sites require comprehensive modernization at this time. Continuing our efforts to paint and/or re-landscape scattered sites, the Authority undertook efforts at fourteen (14) scattered sites during 2004.

- Two scattered sites were painted and re-landscaped.
- Three sites were re-landscaped.
- Nine scattered sites were painted.

Physical needs assessment: The Authority is currently engaged in a comprehensive physical needs assessment of all sites. This assessment will provide the Authority with an up-dated description of existing conditions, needed and anticipated repairs, and cost estimates. Using this report, the Authority will be able to set priorities for the use of funds for capital improvements at the remaining scattered sites.

IV. **Public Housing Revitalization – HOPE VI:**

The Oakland Housing Authority has been quite successful in attracting HOPE VI grants. The most recent three grants, totaling \$57 million, have enabled the Authority to demolish 307 public housing apartments on four sites and replace them with larger, mixed-use, mixed-income developments. The Authority is investing \$12.6 million of its own funds to make these developments possible. Commitments from the City of Oakland for Chestnut Court, Mandela Gateway and phase I of Coliseum now total \$16.3 million for housing and \$3.8 for infrastructure. These investments have leveraged total development of \$136.4 million.

Chestnut Court: The HOPE VI revitalization of the Chestnut Court public housing development was completed in late 2003. This revitalization was undertaken in partnership with BRIDGE Housing Development Corporation and included the demolition of 77 apartments at the old Chestnut Court complex on West Grand Avenue between Chestnut and Linden and the demolition of a six-apartment complex at 1114 14th Street. All 83 apartments were replaced at either the original Chestnut Court site, or the new site owned by BRIDGE, Linden Court. Both sites are mixed-use and mixed-income. The 83 public housing apartments "float" within the total 151 apartments built in the new developments. In addition to the rental housing, retail and community space, the Authority and its partners, BRIDGE and EM Johnson, developed fifteen new affordable homeownership units. The City of Oakland has invested \$7.9 million in rental housing and homeownership funding in this \$45 million undertaking.

Mandela Gateway: The Authority's development partner, BRIDGE, has recently completed Mandela Gateway across from the West Oakland BART station. This new development of 168 affordable rental apartments and 20,000 square feet of retail commercial space replaces the 46 apartment Westwood Gardens which was demolished. The site was expanded to more than twice its original size by the acquisition of adjacent privately-owned and state-owned parcels to the east. When complete, this catalyst site will include 14 for-sale, affordable town homes. The City's investment in this \$57 million development is \$5.4 million.

Coliseum Gardens: In East Oakland, the Authority selected a partnership of East Bay Asian Development Corporation (EBALC), the Related Company and Chambers Construction to carry out the revitalization of the 178 apartment Coliseum Gardens. Following a joint planning effort with the City of Oakland and BART, the Authority's partners demolished the old Coliseum Gardens while the Authority has been acquiring adjacent parcels of land. With the land-swap for the 5-acre City park, the entire twenty-two acre redevelopment is planned for completion in a number of stages. A ground breaking for the 115 apartment first phase was held in June 2004 and construction is underway. Funding for the 146 apartment phase II has been identified and construction will begin later this year. When complete, the new development will include a new City of Oakland park, 15,000 square feet of community/retail space, approximately 450 affordable apartments (including 157 floating public housing units), and 28 homeownership town homes. Twenty-one (21) of the replacement public housing apartments are to be located off-site in the 65-unit Foothill Family Apartments across from Eastmont Mall. To date the City of Oakland has committed \$3 million for phase I and \$3.8 million in infrastructure. The phase I budget is \$34.4 million.

V. **Public housing community involvement:**

In recent years the Authority has been developing a strong working partnership with the Oakland Police Department's Neighborhood Service Coordinators (NSC). Authority staff often attends the NSC's Neighborhood Crime Prevention Council

(NCPC) meetings and consults directly with the NSC and NCPC when there is an issue with an OHA property. Every NSC in the city has a complete list of public housing properties in their neighborhood.

OHA staff also attends Service Delivery Systems (SDS) team meetings as a way to proactively partner with the City. SDS teams, as Council members are aware, are comprised of representatives from major City departments. These meetings have proven to be a valuable forum for OHA to address, and respond to, concerns about public housing properties as well as, on occasion, private properties with Section 8 contracts.

OHA attends many of the NCPC and SDS meetings regularly, and is always available to attend others on an as-needed basis. Currently, NSCs and SDS team leads contact OHA when attendance is requested, and an OHA manager attends the next meeting.

In 2004 the Authority worked in partnership with residents of public housing sites, and some NCPCs to sponsor ten (10) National Night Out events on the first Tuesday in August. The Authority arranged, through our community partners for 110 youth to attend summer camp and for over 140 seniors to receive one-on-one health assessments.

The Authority has also sponsored over fifty (50) community meetings aimed at assisting public housing residents to become positive contributors to their neighborhoods.

VI. **Police accreditation:**

Since 1999, the Oakland Housing Authority Police department (OHAPD) has been accredited by the Commission on Accreditation for Law Enforcement Agencies, Inc. (CALEA). Accreditation is a highly prized recognition of law enforcement professional excellence, and shows that OHAPD has met or exceeded all 444 of CALEA's standards.

Accreditation is for a three-year period. Therefore, OHAPD is due for its second re-accreditation currently. CALEA representatives returned to OHA in December 2004 to review OHAPD. They examined written materials, interviewed OHA residents and staff, and visited offices and other places where compliance can be witnessed. The representatives then convened an open meeting to take public testimony. All findings from this review were reported back to the CALEA Commission, which is expected to make a final decision on OHAPD accreditation this spring.

VII. **Funding:**

Federal operating subsidies and capital funds are determined by formula each year for all local housing authorities. However, Congress has not appropriated sufficient funds for the U.S. Department of Housing and Urban Development to provide each authority the full amount of funds to which it would be entitled.

Capital Funds: In 1993 capital funds peaked for the Authority at \$10.8 million. Due to inadequate appropriations, the Oakland Housing Authority has typically received less than \$9 million in recent years. (In 2004 the Authority received only \$8.4 million.) This short-fall (averaging \$1.2 million a year over the past eleven years) has resulted in the need to defer property improvements and rehabilitations. Fortunately, the Authority has attracted nearly \$83 million in HOPE VI grants benefiting four large sites and four scattered sites.

Public Housing Operating Subsidies: Operating subsidies have also been under-funded four of the past five years with subsidies typically reduced to 94.7% to 99.5%. The accumulated short-fall in operating subsidies represents a deferral in maintenance items or other services to Authority properties of approximately \$1 million over the past five years. Additionally, a recent national study of operating subsidies indicates that the Oakland Housing Authority formula has resulted in under funding of at least another \$4.5 million over the same five years.

Section 8 Funding: Through 2004, Section 8 funding has been adequate for Oakland. However, beginning 2005, we expect funding to be reduced. We have just received notice of a 4% reduction in funding for 2005.

VIII. **Challenges:**

Looking forward, the Authority is poised to undertake a program to improve our large inventory of scattered sites. Our ability to adequately treat the sites as rapidly as desired will necessarily be limited by federal funding. In the meantime, Authority managers will continue to work with neighborhood groups, NCPs, NSCs, and SDSs to address community concerns as they are identified. We expect to use our status as an MTW agency to modify administrative requirements to reduce bureaucratic burdens and shift resources of the Authority to more adequately provide property oversight.

Reductions in Section 8 funding mean that the Authority will have to choose between serving fewer families and serving the same number of families at a lower level of subsidy. Policy choices in this area will be considered by the Commission in the very near future.

Replacement of certain scattered sites and Tassafaronga Village remain on the Authority's agenda. Authority staff members are meeting with City of Oakland staff to determine whether there is an opportunity to develop a joint strategy to replace public housing in a more attractive model, allowing for on-site management while better integrating public housing into the larger community.

Attached are two items of general information related to the Oakland Housing Authority:

The attached *Fact Sheet* describes the size and budget of our current programs.

Our annual report for 2004, titled "*Growth and Change*" provides a description of the outcomes of our fiscal year that ended June 30, 2004.

OAKLAND HOUSING AUTHORITY

**MAKING
TRANSITIONS
WORK
(MTW)**

**ANNUAL PLAN
FY 2004/05**

MAKING TRANSITIONS WORK (MTW)

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EXECUTIVE SUMMARY

MTW Demonstration Program

The Moving to Work (MTW) Demonstration Program provides a unique opportunity for the Oakland Housing Authority (OHA) to explore and test out new and innovative methods of delivering housing and supportive services to low-income residents of Oakland. OHA and HUD executed an MTW Agreement on March 31, 2004, which defined the areas and parameters of OHA's flexibility under MTW. In order to tailor the demonstration program to Oakland, OHA has named our program "**Making Transitions Work**" (MTW).

Initial MTW Annual Plan for FY 2004/05

Each year OHA will develop an Annual MTW Plan to provide an overview of OHA and its programs and to describe the MTW initiatives and program or policy changes planned for that year. The initial MTW Annual Plan covers the planned activities for OHA's FY 2004/05 from July 1, 2004 to June 30, 2005.

MTW Activities Planned for FY 2004/05

Once the extent of the MTW Demonstration was confirmed to OHA by HUD, an assessment was made of all the proposed MTW initiatives. Issues such as urgency of need and staff capacity were considered. As OHA is committed to encourage stakeholder involvement in the development of new policies and programs, few new initiatives will be implemented the first year. The time will be used to investigate a number of important policy issues for possible implementation in subsequent years. With the understanding that situations may arise that could alter these assessments, the following MTW activities will be pursued or explored during the fiscal year:

- Adopt a consolidated Public Housing Operating and Capital Fund budget.
- Explore and possibly adopt a Section 8 block grant merging all eligible Section 8 vouchers into a single program with one set of rules and creating alternatives to existing HUD regulations.
- Utilize MTW budget flexibility authority.
- Explore and possibly revise investment policies.
- Explore and possibly adopt new Public Housing rent policies and recertification process.
- Explore and possibly adopt new Section 8 Family Payment Standard (rent) policies and recertification process.

- Explore and possibly adopt new Public Housing inspection protocols.
- Explore and possibly adopt new Section 8 inspection protocols.
- Explore and possibly adopt performance measures to replace portions of HUD's PHAS system.
- Explore and possibly adopt performance measures to replace portions of HUD's SEMAP system.
- Explore and possibly adopt methods to simplify and streamline the procurement process.
- Explore and possibly adopt methods to simplify the wage-rate monitoring process.
- Explore and possibly adopt local policies for the project-basing of Section 8.
- Explore and possibly adopt ways of simplifying the demolition and/or disposition approval process with HUD to see if the extensive time and effort needed to complete and submit repetitive information can be reduced or eliminated.
- Create alternative methods to develop affordable housing, replace public housing and coordinate development activities with the City of Oakland.
- Explore the feasibility of adopting alternative methods of reporting on Capital Improvements.

INTRODUCTION

A. Purpose

This initial MTW Annual Plan for FY 2004/05 provides OHA residents, the public and the U.S. Department of Housing and Urban Development (HUD) with the following:

- Provides baseline information on existing OHA programs prior to the start of the MTW demonstration.
- Identifies the areas of policy in which changes are likely to occur to these programs during the fiscal year ending June 30, 2005.
- Provides information on the adopted OHA Budget for FY 2004/05 for the period of July 1, 2004 through June 30, 2005.

B. Contents of the MTW Annual Plan Year 1

The basic format for this plan is defined by the MTW Agreement between HUD and OHA. Each of the following sections provides information on current and planned programs, policies, and issues. If changes to these policies are proposed in the future, a detailed comparison between the existing policy or rule and the proposed policy will be provided to all interested parties and will be fully considered along with any comments by the Board of Commissioners prior to adoption. Notice of any resulting policy changes will be provided to HUD and will be included in succeeding MTW Annual Plans.

C. Public Process

The Oakland Housing Authority is committed to ensuring that the community is involved in developing the MTW Annual Plan and the ensuing policy changes. On April 30, 2004, the Authority invited over 50 community stakeholders (legal advocates, representatives from the Mayor's and local council members offices, community-based organizations, development partners and others) to an MTW Orientation. During this meeting, opportunities under MTW and the MTW Annual Plan were discussed. The concepts were well received and many stakeholders expressed an interest in continuing to be involved in the process. The Authority is planning to develop several task forces to develop new policies under the MTW program for which the community stakeholders will be invited to participate.

On May 5, 2004, the Resident Advisory Board (RAB) met to discuss their role in the MTW process. While not an MTW requirement, the Authority has chosen to continue the RAB as resident input is a very important part of the process as it

provides another perspective, one that otherwise might be overlooked. The RAB members appreciated being involved in developing the first MTW Annual Plan and are looking forward to participating in the development of new MTW policies.

On May 12 and 13, 2004, the Authority met with local HUD officials from the San Francisco Regional Office to provide a brief orientation to MTW. While there are two other MTW housing authorities in the area, the Oakland program will be the largest and most inclusive. Abt Associates, our MTW monitor was also present at this meeting to discuss their role and MTW Annual Plan approval process.

The MTW Annual Plan may be amended pending any comments made at the public hearing and Commissioners actions. Any such amendments will be sent to HUD for approval and also kept in the Authority's MTW Files. The approved MTW Annual Plan will be posted on the Authority's website at www.oakha.org.

SECTION I HOUSEHOLDS SERVED

This section describes the number and characteristics of households being served by the Oakland Housing Authority (OHA) and the number and characteristics of those on OHA waiting lists at the beginning of the fiscal year. This section projects any changes to the totals during the fiscal year, provides an explanation for the anticipated changes and proposed actions under MTW.

A. Number and Characteristics of Households Being Served at the Beginning of the Fiscal Year on July 1, 2004

1. Unit Size

a. Public Housing

See Attachment I-A-1-a

b. All Section 8 in MTW

See Attachment I-A-1-b

2. Family Type (Families, Seniors and Persons with Disabilities)

a. Public Housing

See Attachment I-A-2-a

b. All Section 8 in MTW

See Attachment I-A-2-b

3. Income Group (<30%; 30%–50%; 50%–80% of Median Income)

Published 2004 Median Income Levels for Oakland, California

Family Size	30%	50%	80%
One	\$17,400	\$29,000	\$46,350
Two	\$19,850	\$33,100	\$53,000
Three	\$22,350	\$37,250	\$59,600
Four	\$24,850	\$41,400	\$66,250
Five	\$26,850	\$44,700	\$71,550
Six	\$28,800	\$48,000	\$76,850
Seven	\$30,800	\$51,350	\$82,150
Eight	\$32,800	\$54,650	\$87,450

a. Public Housing

Number of Public Housing Families and % of Median Income

Unit Size	< 30% Extremely Low Income	30% - 50% Very Low Income	50% - 80% Low Income
One	737	74	19
Two	685	190	53
Three	707	146	36
Four	113	23	2
Five	14	1	0
Not Entered	5	0	0

Also See Attachment I-A-3-a

b. All Section 8 in MTW

Number of Section 8 Families and % of Median Income

Unit Size	< 30% Extremely Low Income	30% - 50% Very Low Income	50% - 80% Low Income
One	2972	214	28
Two	3295	645	146
Three	2715	564	130
Four	610	110	11
Five	90	16	3
Six	10	4	0

Not Entered	3	0	0
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Also See Attachment I-A-3-b

4. Housing Type

a. Public Housing

Total Public Housing Units
3308

b. All Section 8 in MTW

Type of Unit	Voucher	Certificate	Mod Rehab	Total
Total	10,871	0	496	11,367

5. Race and Ethnicity of Head of Household

a. Public Housing

See Attachment I-A-5-a

b. All Section 8 in MTW

See Attachment I-A-5-b

B. Number and Characteristics of Applicants on Waiting Lists at the Beginning of the Fiscal Year on July 1, 2004

1. Public Housing

See Attachment I-B-1-a and Attachment I-B-1-b

Waiting List Issues and Proposed Actions:

The Authority's last Conventional Public Housing wait list opening was in the Spring of 2003. There are more than 3,500 applicants remaining on the wait list. With the limited number of available public housing units, there will be no

need to open the Conventional Public Housing wait list this year. Site-based wait lists are being used at the Authority's HOPE VI sites, and the Authority will consider establishing additional site-based wait lists.

2. All Section 8 in MTW

See Attachment I-B-2-a and Attachment I-B-2-b

Waiting List Issues and Proposed Actions:

The Authority expects its Section 8 program to be at a 101% utilization rate at the end of its FY 2004 fiscal year and to maintain a 98% to 100% utilization rate throughout FY 2005. The Authority expects to call few, if any, families from the Section 8 wait list over the next year. The Authority does not expect to open its wait list this year.

C. Number Projected to be Served at the End of the Fiscal Year on June 30, 2005

1. Public Housing

Total Public Housing Units
2905

2. All Section 8 in MTW

Type of Unit	Voucher	Certificate	Mod Rehab	Total
Total	10,653 - 10,871	0	496	11,149- 11,367

D. Narrative Discussion / Explanation of Change and Proposed Actions

1. Public Housing

This year the Authority will reoccupy 142 units of newly modernized public housing with the completion of Lockwood Gardens development, and 46 units with the completion of Mandela Gateway HOPE VI development. These

changes will increase the number projected to be served by the end of FY2005. There are no other significant changes in the public housing program this year.

2. All Section 8 in MTW

The Authority expects its Section 8 program to be at a 101% utilization rate at the end of its FY 2004 and to maintain a 98% to 100% utilization rate throughout FY 2005. The Authority does not expect any significant changes in its Section 8 program over the coming fiscal year.

SECTION II OCCUPANCY AND RENT POLICIES

This section provides information on occupancy policies governing eligibility, selection, admissions, assignment and occupancy of families, including the admissions policy for deconcentration of lower-income families and rent policies. The Oakland Housing Authority will begin the year using our existing ***Public Housing Admissions and Continued Occupancy Policy*** (attached as Attachment II-A) and ***Section 8 Administrative Plan*** (attached as Attachment II-B). Proposed and potential areas of policy revisions under MTW are described in this section.

A. Occupancy Policies

1. Eligibility

a. Public Housing

The Authority will review its current public housing occupancy policies, but anticipates no significant changes to be made this year.

b. All Section 8 in MTW

The Authority will examine using site-based lists and preferences for project-based units.

2. Selection

a. Public Housing

The Authority will review its current public housing Tenant Selection and Assignment Plan (TSAP), but anticipates no significant changes to the existing selection preferences this year.

b. All Section 8 in MTW

The Authority will explore utilizing separate wait lists for various programs/sites (e.g., targeted programs, project-based sites, etc.) and may allow skipping on its wait lists to select families by income and unit size. The Authority may alter its local preferences. The Authority will examine changing its income targeting requirements from the non-MTW mandate of 75% of new contracts at 30% or less of area median income.

3. Admissions

a. Public Housing

The Authority will review existing public housing admissions policies, but anticipates no significant changes this year. OHA is updating the Admissions and Continued Occupancy Policy to include income verification protocols as required by HUD.

b. All Section 8 in MTW

The Authority will consider increasing its upper income limit for program eligibility from 50% of AMI to 80%. OHA is updating the Administrative Plan to include income verification protocols as required by HUD.

4. Assignment

a. Public Housing

The Authority will review its current public housing Tenant Selection and Assignment Plan, but anticipates no significant changes to the existing assignment policies this year.

5. Occupancy

a. Public Housing

The Authority will review existing public housing occupancy policies, but anticipates no significant changes this year.

b. All Section 8 in MTW

The Authority will change its subsidy standards. The Authority will only affect families upon first entry or when they move.

6. Deconcentration

a. Public Housing

The Authority has 3 general occupancy public housing developments covered by the deconcentration rule. Currently, none of these developments have average incomes above or below 85% to 115% of the average incomes of all such developments. The Authority will continue to analyze these developments according to the deconcentration rule.

b. All Section 8 in MTW

The Authority may examine changing its income targeting requirements from the current mandate of 75% of new contracts at 30% or less of area median income. The Authority also may examine utilizing differing payment standards or subsidies for families in areas with differing rental costs as well as for those who port out to other housing authorities. The Authority may consider altering all elements of its portability policies, including the ability to port and the subsidy provided to families who port from the Authority's jurisdiction.

B. Rent Policies

a. Public Housing

The Authority may review all existing rent policies, and may consider various changes that simplify the reexamination process, encourage self-sufficiency, promote economic growth, provide stability to senior households and enhance administrative efficiencies.

b. All Section 8 in MTW

The Authority may explore changing all aspects of its method of calculating and providing subsidies (e.g., income exclusions and deductions, reporting requirements, the possibility of providing a flat subsidy, the possibility of providing a different subsidy to ports, etc.). The Authority may also examine any proposed changes to ensure they continue to promote programs such as Section 8 homeownership and FSS.

SECTION III CHANGES IN HOUSING STOCK

This section describes the number of public housing and Section 8 units provided by OHA at the beginning of the fiscal year and the number projected to be available at the end of the fiscal year. An explanation of projected changes and proposed actions under MTW are also included.

A. Number of Housing Units at the Beginning of the Fiscal Year on July 1, 2004

TYPE OF UNIT	VOUCHER	CERTIFICATES	MOD REHAB	PUBLIC HOUSING	TOTAL
TOTAL	10,871	0	496	3308	14,675

B. Number of Housing Units Projected for the End of the Fiscal Year on June 30, 2005

TYPE OF UNIT	VOUCHER	CERTIFICATES	MOD REHAB	PUBLIC HOUSING	TOTAL
TOTAL	10,871	0	496	3308	14,675

C. Explanation of Projected Changes and Proposed Actions

1. Public Housing

The Oakland Housing Authority has three mixed-finance HOPE VI projects, in varying stages of completion, which affect a total of 307 public housing units.

The Chestnut/Linden Court HOPE VI project was completed in 2003. There are a total of 83 public housing units being managed and maintained by the John Stewart Company (JSCO) in accordance with a HUD-approved Management Plan. The Developer/Partner of the Chestnut Linden Court project, Bridge Housing Corporation, (BRIDGE) employed JSCO. The 83 Chestnut Linden public housing units are included in two project numbers. The project number for the Chestnut Court site is CA003081 and includes 45 public housing units. The project number for Linden Court is CA003082 and it includes 38 public housing units. Public housing unit vacancies at the Chestnut Linden Court development are

filled using a site-based waiting list that is maintained by BRIDGE and JSCO. The public housing units will "float" throughout the development.

The Mandela Gateway (formerly Westwood Gardens) HOPE VI project will be re-occupied in late 2004 and/or early 2005. There are a total of 46 public housing units included in Mandela Gateway HOPE VI project. The 46 public housing units will be managed and maintained by JSCO in accordance with a HUD-approved Management Plan. The Developer/Partner of the Mandela Gateway project, BRIDGE, hired JSCO. The project number for the 46 public housing units at Mandela Gateway has not been established. Public housing units at Mandela Gateway will initially be offered to residents that were relocated from public housing. A site-based waiting list will be used to fill public housing units once the returning residents have been accommodated. The site-based waiting list will be maintained by BRIDGE and JSCO. The public housing units will "float" throughout the development.

The Coliseum Gardens HOPE VI project includes a total of 178 public housing units. The Coliseum Gardens project is being developed in phases. The Oakland Housing Authority will not manage the 178 public housing units that are being revitalized as part of the Coliseum Gardens HOPE VI project. The Developer(s)/Partner(s) will use a management company, which will be bound by a HUD-approved Management Plan, to manage and maintain the public housing units. A site-based waiting list will be used to occupy public housing units after former Coliseum Gardens residents have been provided with the opportunity to return (anticipated to begin in late 2005).

The Authority will reoccupy 142 units of newly modernized public housing this year with the completion of Lockwood Gardens development. These changes will increase the number projected to be served by the end of FY2005. There are no other significant changes in the public housing program this year.

b. All Section 8 in MTW

The Authority does not anticipate making any changes to the size of the Section 8 program during the fiscal year. The distribution between Moderate Rehabilitation and Voucher units may vary if there are any opt-outs during the fiscal year.

SECTION IV SOURCES AND AMOUNTS OF FUNDING

This section describes the sources and amounts of funding included in the consolidated MTW budget statement, the sources and amounts of funding outside the consolidated budget and the consolidated budget statement.

A. Source and Amount of Funding Included in the Consolidated MTW Budget

Under MTW, OHA has consolidated Public Housing Operating and Capital Fund funding into one unified budget. Following is the FY 2004/05 budget that was adopted by the OHA Board of Commissioners on May 24, 2004.

SOURCE:	AMOUNT
Dwelling Rental Income	\$9,538,000
Other Income	\$75,000
Public Housing Block Grant ¹	\$10,303,000
Capital Fund Block Grant	\$8,763,000
Investment Income ²	\$500,000
Total Consolidated MTW Budget	\$29,179,000
Notes:	
1. Due to expected HUD funding shortfall we expect to receive only 93% of the \$11,079,000 we are eligible for.	
2. Interest income transferred from Housing Choice Voucher and Local Fund programs to subsidize cost of Police Services in Low Rent Public Housing Program.	

B. Source and Amount of Section 8 Funding Not Included in the Consolidated MTW Budget

SOURCE:	AMOUNT
Housing Choice Voucher Subsidy ¹	\$146,182,700
Moderate Rehab Subsidy	\$3,664,200
Shelter Plus Care Subsidy	\$2,104,100
Investment Income	\$250,000
Investment Income Transfer ²	-\$250,000
Total	\$151,951,000
Notes:	
1. Program must maintain an average per unit HAP cost of	

no more than \$1,044 to achieve its lease-up goal. 2. Interest income transferred to Low Rent Public Housing Program to subsidize Police Services.	
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C. Source, Amount and Use of Special Purpose Funding Outside the Consolidated MTW Budget

SOURCE:	AMOUNT
Local Fund	\$300,000
HOPE VI Grants ¹	\$10,379,000
Capital Fund Program ²	\$10,978,000
Investment Income	\$250,000
Investment Income Transfer ³	-\$250,000
Total	\$21,657,000
Notes:	
1. Funding is primarily for Coliseum Gardens HOPE VI Project.	
2. Funding is primarily for the completion of Lockwood Gardens Phase III.	
3. Interest income transferred to Low Rent Public Housing Program to subsidize Police Services.	

D. Total Revenue Budget

SOURCE:	AMOUNT
Consolidated MTW Budget	\$29,179,500
Section 8 Funding not included in MTW	\$151,951,000
Special Purpose Funding not included in MTW	\$21,657,000
Total Revenue	\$202,787,500

E. Explanation of Projected Changes and Proposed Actions

1. Effect of Federal Budget Shortfalls:

Federal budget cutbacks in public housing funding may require the Oakland Housing Authority to reduce staff and maintenance improvements.

2. Investment Policy

Utilizing MTW authority, OHA proposes to explore the adoption of investment

policies consistent with California State law to replace HUD investment policies. The primary goal is to allow OHA the flexibility to invest its financial resources productively and efficiently, without a duplication of regulations.

3. Advance Monies From Local Fund

OHA may loan monies for public housing activities from the Local Fund to fund projects consistent with the goals of the agency such as land acquisition, public housing redevelopment and capital improvements. Such loans are to be repaid from future years consolidated public housing funds. Interest may be charged at the prevailing investment rate.

SECTION V USES OF FUNDS

This section describes the previous year expenditures by line item, this year's planned MTW expenditures by line item, a description of the changes in proposed activities and investments from the previous year, a discussion of the level and adequacy of reserves and proposed actions under MTW.

A. Previous Fiscal Year Expenditures by Budget Line Item

The Authority's first budget under MTW is being submitted for FY2004/05 covering July 1, 2004 to June 30, 2005. As the current year is not yet complete, the Authority will report its current fiscal year expenditures under normal, non-MTW, procedures.

B. Planned Expenditures by Budget Line Item and Proposed Actions

CONSOLIDATED MTW	FY 2005 BUDGET
Line Item:	
Administration & General ¹	\$9,993,000
Tenant Services	\$342,000
Utilities	\$2,524,000
Maintenance & Contracts	\$6,892,000
Police Services ²	\$1,038,000
Capital Projects	\$8,037,000
Capital Equipment	\$353,000
Total Expenditures	\$29,179,500
OTHER PROGRAMS	
Line Item:	
Administration & General ¹	\$11,599,000
Housing Assistance Payments	\$141,748,000
Tenant Services	\$273,000
Maintenance & Contracts	\$490,000
Police Services	\$307,000
Capital Projects	\$19,335,000
Capital Equipment	\$93,000
Total Expenditures	\$173,845,000
Note:	
1. Due to a 40% increase in workers compensation costs, Risk Management will be very proactive in initiating training and seek the closing of long outstanding claims.	
2. Police Services will aggressively expand its'	

fraud activities in an effort to create an additional funding stream.	
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C. Description of Changes in Proposed Actions and Investments by Budget Line Item from the Previous Year

The Authority's first budget under MTW is being submitted for FY2004/05 covering July 1, 2004 to June 30, 2005. As the current year is not yet complete, the Authority will report its current fiscal year expenditures under normal, non-MTW, procedures; and therefore cannot compare to a previous MTW budget.

D. Level and Adequacy of Reserves and Proposed Actions

Projected Reserves	Projected FY 2004	Projected FY 2005
Consolidated MTW	0.00	0.00
Other Programs:		
Housing Choice Voucher Admin Fee Reserves ¹	\$10,000,000	\$4,000,000
Moderate Rehab Admin Fee Reserves	\$1,800,000	\$1,800,000
Shelter Plus Care Admin Fee Reserves	\$500,000	\$600,000
Local Fund Reserves ²	\$5,700,000	\$4,000,000
Total Reserves	\$18,000,000	\$10,400,000
Note: 1. Reserves in Housing Choice Voucher Program will decrease due to commitment made to Coliseum Gardens HOPE VI Project. 2. Reserves in Local Fund will decrease due to the use of funds for capital projects.		

SECTION VI CAPITAL PLANNING

This section describes OHA's major capital needs and projects, estimated costs and proposed timetables for addressing these needs. This section also identifies planned capital expenditures, demolition and disposition requests and homeownership activities during the fiscal year ending June 30, 2005 and proposed actions under MTW.

A. Major Capital Needs and Projects, Estimated Costs and Proposed Timetables

1. Complete modernization of Lockwood Gardens Phase III – (142 units) - \$20,125,000 budget, construction schedule 10/03 – 5/05
2. Complete new construction of Peralta MPB, \$5,567,200 budget, construction schedule 4/03 – 9/04
3. Complete balconies and façade repairs 2202 Mitchell Street (7 units), \$162,000 budget, construction schedule 7/04 – 9/04
4. Complete balconies and façade repairs 565 45th Street (6 units), \$160,000 budget, construction schedule 7/04 – 9/04.
5. Currently performing Physical Needs Assessment on sites listed in the 5-Year Plan (see attachment VI-A). Once complete, the Authority we will explore priorities and timetables.
6. Repair elevators at the Administrative Office, 1619 Harrison Street.

B. Capital Expenditures

See Attachment VI-A for the 5-Year Plan. Budget figures for subsequent fiscal years will be available pending the final report from the Physical Needs Assessment.

C. Planned Demolition and Disposition Requests

OHA will explore ways of simplifying the demolition and/or disposition approval process with HUD to see if the extensive time and effort needed to complete and submit repetitive information can be reduced or eliminated.

The Authority may submit Demolition and Disposition Applications to HUD Special Applications Center for the following scattered site and family developments:

1. 624 Apgar Street (5 units);
2. 3025 Martin Luther King Jr. Boulevard (7 units);

3. 2509 77th Avenue (22 units); and
4. Tassafaronga (945 84th Avenue) (87 units) .

Such plans will be dependent on developing replacement strategies.

D. Planned Homeownership Activities

The Oakland Housing Authority has three mixed-finance HOPE VI projects. Each of the Authority's mixed-finance HOPE VI projects has a homeownership component. No HOPE VI funding is being utilized to develop homeownership units.

The Chestnut Linden Court HOPE VI project included the development of 18 affordable homes for first-time homebuyers. Seventeen homes have been sold to first-time homebuyers. By the end of 2004, the final Chestnut Court homeownership unit will be sold. The Authority records resale restrictions and retains the first option to purchase the homes in an attempt to keep them affordable and available to first-time homebuyers in the long-term.

The Mandela Gateway HOPE VI project includes the development of 14 affordable homes for first-time homebuyers. The Authority is providing predevelopment financing for the homeownership project but is not providing any permanent subsidy. The City of Oakland (City) and Federal Home Loan Bank Affordable Housing Project (AHP) are the main source of financing for the Mandela Gateway homeownership project. The City and AHP will place various restrictions on the homeownership units in order to keep the sales prices affordable and available to first-time homebuyers in perpetuity.

The Coliseum Gardens HOPE VI project includes the development of 32 homeownership units. The homeownership phase of the Coliseum Gardens project is in the planning stages. Financing sources and the affordability levels of the for-sale homes have not been determined.

The Authority will continue its Section 8 homeownership program. The Authority may make changes to its homeownership program in response to other proposed changes under the MTW program (e.g., changes in the method of calculating subsidy).

SECTION VII

MANAGEMENT INFORMATION FOR PUBLIC HOUSING UNITS

This section provides information on OHA management performance indicators for public housing units under OHA management at the beginning of the fiscal year on July 1, 2004.

A. Vacancy Rates

1. Vacancy Rates by Public Housing Site at the Beginning of the Fiscal Year on July 1, 2004

See Attachment VII-A-1

2. Issues and Proposed Actions

The Authority will have approximately a 2.7% routine (non-modernization) public housing vacancy rate at the beginning of the Fiscal Year for reoccupancy. With this limited number of routine vacancies, the Authority will continue to increase efficiencies in its leasing process to ensure that vacant units are leased to eligible families in the shortest period of time. Currently, 396 units are undergoing comprehensive modernization.

3. Target Rates by Property at End of Fiscal Year on June 30, 2005

The Authority's target will be less than 2% vacancy for all public housing sites by the end of the fiscal year on June 30, 2005.

B. Rent Collections

1. Percentage of Rents Uncollected at Beginning of Fiscal Year on July 1, 2004

The percentage of rents uncollected at the beginning of the fiscal year on July 1, 2004 is expected to be less than 3.5%.

2. Issues and Proposed Actions

The Authority will continue to analyze tenant accounts on a monthly basis. To preserve the tenancy, the Authority will continue to work with public housing families to help them develop better rent payment practices. In some cases repayment agreements will be considered as an alternative to eviction for failure to pay rent.

3. Targeted Percentage of Rents Uncollected at End of Fiscal Year on June 30, 2005

The targeted percentage of rents uncollected at the end of the fiscal year on June 30, 2005 is less than 3%.

C. Work Orders

1. Response Rates at Beginning of Fiscal Year on July 1, 2004

a. Percentage of Emergency Work Orders Within 24 Hours

100% of all Emergency Work Orders are planned to be completed within 24 hours.

b. Percentage of Regular Work Orders Within 30 days

100% of Regular Work Orders are planned to be completed within 30 days or scheduled in a program for completion.

2. Issues and Proposed Actions

The Authority is proposing to fully implement methods that will allow most work orders to be completed on first response.

3. Target Rates at End of Fiscal Year on June 30, 2005

The Authority will comply with UPCS during the inspection, issue work orders for the repairs, or defer the deficiency to the next years capital fund program.

D. Inspections

1. Description of Inspection Strategy

The Authority will continue to inspect at all available public housing units and buildings on an annual basis. Units and buildings that are vacant and undergoing comprehensive modernization through the Capital Fund or HOPE VI will not be inspected until they are ready for reoccupancy.

2. Percentage of Planned Inspections this Fiscal Year

The Authority will target 100% of all units and buildings that are occupied or are available for occupancy. Units and buildings that are vacant and undergoing comprehensive modernization through the Capital Fund or HOPE VI will not be inspected until they are ready for reoccupancy.

E. Security – Issues and Proposed Actions

The Oakland Police Department (OPD) is the primary law enforcement agency in the city including Authority-owned properties. The Oakland Housing Authority Police Department (OHAPD) is able to leverage the resources of a much larger municipal police agency. OHAPD Officers do not respond to emergency 911 calls or conduct lengthy investigations, and therefore are able to focus their time on community issues raised by Authority tenants and residents in neighborhoods surrounding Authority properties.

OHAPD officers have assisted with program integrity including investigating potential fraud in the Section 8 and public housing programs. OHAPD will continue to focus attention on crime related and other community issues which affect public housing tenants and Section 8 participants.

During the next year, OHAPD will focus on the following goals and objectives:

- Employ pro-active measures toward reducing crime on and around Authority-owned properties;
- Conduct regular crime analysis on calls for service to determine trends as well as types of calls OHAPD is receiving and adjust workload assessments and officer deployment accordingly;
- Continue to investigate fraud in the Section 8 and public housing programs;
- Increase resident involvement through community meetings and resident patrols;

- Continue to create safety brochures for public housing residents, Section 8 participants and Authority employees;
- Maintain national accreditation through the Commission on Accreditation for Law Enforcement Agencies (CALEA);
- Continue Police Athletic League (PAL) activities which includes camping trips and other outings with youth;
- Conduct emergency action plan drills and demonstrations at all Authority service facilities; and
- Conduct resident surveys and utilize the survey result information when developing patrol strategies.

SECTION VIII MANAGEMENT INFORMATION FOR MTW SECTION 8 UNITS

This section provides information on OHA management performance indicators for administering the Section 8 Program at the beginning of the fiscal year on July 1, 2004, notes issues and proposed actions that will affect the indicators and provides OHA's projected targets for the indicators for the end of the fiscal year on June 30, 2005.

A. Leasing Information

1. Percentage of MTW Section 8 Units Under Lease at the Beginning of the Fiscal Year on July 1, 2004

The Authority projects that 97.4% of Section 8 units will be under lease at the beginning of the fiscal year on July 1, 2004.

2. Percentage of MTW Section 8 Units Projected to be Under Lease at the End of the Fiscal Year on June 30, 2005

The Authority projects that 98% - 100% of Section 8 units will be under lease at the end of the fiscal year on June 30, 2005.

3. Plans Regarding:

a. Rent Reasonableness

The Authority is unlikely to make any changes in this area. However, OHA may examine changes in response to changes it makes in areas such as subsidy provision or in response to program funding changes.

b. Expanding Housing Opportunities

The Authority will continue its outreach activities. The Authority is likely to propose changes to the project-based program over the coming year. The Authority may expand eligible housing types under the program to include assisted living facilities and communities. The Authority may examine and change its income targeting requirements. The Authority also may examine utilizing differing payment standards

or subsidies for families in areas with differing rental costs as well as for those who port out to other housing authorities. The Authority may consider altering all elements of its portability policies, including the ability to port and the subsidy provided to families who port from the Authority's jurisdiction. The Authority is likely to propose changes to the project-based program over the coming year.

c. Deconcentration of Low-Income Families

The Authority may examine and change its income targeting requirements. The Authority also may examine utilizing differing payment standards or subsidies for families in areas with differing rental costs as well as for those who port out to other communities. The Authority will consider altering all elements of its portability policies and the subsidy provided to families who port from the Authority's jurisdiction.

4. Issues and Proposed Actions

The Authority will develop updated and effective reporting and monitoring systems in response to any program changes it makes. The Authority will explore methods of streamlining both the reporting requirements it has for Section 8 clients and what is reported to HUD. The Authority will explore block granting its Section 8 program.

B. Inspection Strategy

1. Description of Inspection Strategy:

a. Planed Inspections Completed (% this FY) by Category:

1. Annual HQS Inspections

Currently, 100%. However, the Authority may develop an alternative inspection methodology that would require less frequent inspections.

2. Pre-contract HQS Inspections

100%.

3. HQS Quality Control Inspections

Currently, the Authority will maintain a quality control schedule in accord with the standards set forth under HUD's SEMAP guidelines. However, the Authority may develop an alternative inspection methodology that would require a different number of quality control inspections.

b. HQS Enforcement

100% in cases of complaints and failed inspection items. However, the Authority may develop an alternative inspection methodology that would allow some items to be cross-certified by the Section 8 client and owner without a follow-up physical inspection by the Authority.

SECTION IX RESIDENT PROGRAMS

This section describes the community and supportive services programs available to OHA public housing residents and Section 8 participants. This section also describes issues and proposed actions for resident programs during this fiscal year.

A. Description of Programs and Activities

The Oakland Housing Authority mission includes the aim to support public housing resident and Section 8 participant self-sufficiency, civic involvement and economic development. Specifically, the Authority supports this endeavor through the following methods:

- Provide resource information, referral and enrollment assistance to community based services;
- Distribute and post job training and employment opportunities;
- Provide on-site orientations and workshops facilitated by partner agencies;
- Coordinate para-professional job training programs targeting seniors and young adults;
- Facilitate the HOPE VI and Section 8 Homeownership programs;
- Increase the Section 8 Family Self Sufficiency (FSS) program;
- Increase Section 3 job opportunities and training;
- Recruit and assist Section 3 resident businesses to obtain work on Authority contracts;
- Refer residents/clients to entrepreneurial training and support programs;
- Coordinate resident/client leadership training for participation in citywide civic activities;
- Provide HOPE VI Community and Supportive Services as provided by community based organizations;
- Provide staff support to resident community groups and resident councils;
- Staff the Resident Advisory Board;
- Organize site based resident programs and activities; and,
- Work in partnership with community-based organizations to ensure that Section 8 participants and public housing residents have equal access to self-sufficiency services and opportunities.

B. Issues and Proposed Actions

Authority programs and services will continue to assist residents and Section 8 participants to obtain employment, completion of education goals, completion of savings programs, civic participation, heightened awareness and improved lifestyle

toward positive mental and physical health, participation in life enrichment activities and homeownership. While the Authority and its partners have experienced reduced resources, Authority staff continues to provide resident programs and activities through the creative reorganization of services and programs, fund raising, and the establishment of new and unique community partnerships.

The primary issue that affects resident programs is the reduction in service funding and ensuring that Authority clients have the essential skills to compete in the ever-changing job market. To address this challenge, the Authority will consider and may adopt the following program enhancements:

- Identify and provide information for Section 8 participants and public housing residents to transition from governmental subsidies.
- Provide information and resources for Section 8 participants and public housing residents to develop career paths.
- Support Section 8 participants and public housing residents in becoming homeowners via the Section 8, HOPE VI, IDEA and other local Homeownership programs.
- Increase the number of participants in the Section 8 FSS program.
- Develop a public housing self-sufficiency incentive program.
- Provide regular training for Authority staff through non-profit resources to increase staff knowledge of workforce development, home-ownership and social service program skill sets.
- Enhance and support partnerships with community-based organizations that provide in-home supportive services.
- Develop a stipend paid resident job-training program. "Resident Ambassadors" will provide site based peer support for lease compliance and community building, as well as provide basic site maintenance. Resident Ambassadors completing the 1-year term will move into un-subsidized employment.
- Utilize Resident Leadership Volunteers as community sources for information referral regarding workforce development, self-sufficiency and social service programs.
- Co-author alternative funding proposals (non-government) with community based organizations and faith-based partners (also utilizing the Authority's non-profit foundation).

SECTION X OTHER INFORMATION REQUIRED BY HUD

This section provides documentation to HUD that OHA has complied with specific requirements of the MTW Agreement. Attached therefore are the following items:

A. OHA Board of Commissioners Resolutions and Required HUD Certifications

1. Board Resolution adopting the initial FY 2004/05 MTW Annual Plan
2. PHA Certifications of Compliance with MTW Plan Requirements
3. Board Resolution adopting the OHA FY 2004/05 Budget
4. Board Resolution approving subsidy request for FY 2004/05
5. Form HUD-50070, Certification for a Drug Free Workplace
6. Form HUD-50071, Certification of Payments to Influence Federal Transactions
7. Form SF-LLL, Disclosure of Lobbying Activities

B. Required Certifications and Other Submissions from Which OHA is Not Exempted by the MTW Agreement

None

B. Submissions Required for the Receipt of Funds

1. Form HUD-52723, Calculation of PFS Operating Subsidy
2. Form HUD-52722-A, Calculation of Allowable Utilities Expense Level
3. Form HUD-52673, Estimate of Total Required Annual Contributions
4. Form HUD-52663, Requisition for Partial Payment of Annual Contributions
5. Employee Allocation Certification
6. Form HUD-52837, CGP Annual Statement, Parts I, II and III

Housing Authority of the City of Oakland, California

1619 Harrison Street
Oakland, California 94612
(510) 874-1500

F a c t

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

- ⌘ Established on April 28, 1938.
- ⌘ Governed by seven-member Board of Commissioners appointed by the Mayor of the City of Oakland, with the approval of the City Council. Two members are residents of the Housing Authority.
- ⌘ Executive Director: Jon Gresley
- ⌘ Total operating budget of nearly \$203 million in FY 2004-2005.
- ⌘ Over \$142 million is expected to be paid to private landlords for Housing Assistance Payments in FY 2004-2005.
- ⌘ Obligated over \$103 million to date for FY 2004-2005 rehabilitation projects.
- ⌘ Oakland Housing Authority owns or provides rental assistance for a total of 14,935 units.

3,308 Conventional Units on 267 Sites (Housing Authority owned)

1,687 units at large developments
1,621 units at scattered sites

11,627 Section 8 Leased Housing Budgeted Units (rental assistance to private owners)

10,874 Vouchers
500 Moderate Rehabilitation
210 Shelter Plus Care units
18 Non-Federally Funded Units
25 Other Federally Funded Units

- ⌘ Budgeted staff of 313 in the following departments: Executive Office, Development, Facilities Management, Finance, Housing Management, Human Resources, Leased Housing, Management Information Services, Police, Resident & Community Services and California Affordable Housing Initiatives.
- ⌘ Police Department is CALEA accredited.
- ⌘ Processes approximately 51 requests per day for maintenance.
- ⌘ Customer Assistance line (24 hours): 874-1632
- ⌘ OHA Speakers Bureau available: please call the Executive Office at 874-1661. January 2005 (Rev)