

**CITY OF OAKLAND
COUNCIL AGENDA REPORT**

FILED
OFFICE OF THE CITY CLERK
OAKLAND
2003 NOV 25 AM 9:11

TO: Office of the City Manager
ATTN: Deborah Edgerly
FROM: Director of Housing and Community Development
DATE: December 9, 2003

RE: **REPORT REGARDING (1) THE EVALUATION OF YEAR 2002-2003 COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAMS (2) REVIEW OF OAKLAND'S CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER) FOR COMMUNITY DEVELOPMENT BLOCK GRANT, HOME, HOUSING OPPORTUNITIES FOR PEOPLE WITH AIDS AND EMERGENCY SHELTER GRANT PROGRAMS PERFORMANCE FOR THE YEAR 2002-2003 (3) CHANGE IN USE AND SERVICES OF CONTRACT WITH SENECA CENTER AT OAK KNOLL; and RESOLUTION ALLOCATING AN ESTIMATED AWARD OF \$10,106,000 OF COMMUNITY DEVELOPMENT BLOCK GRANT FUNDS FOR FY 2004-2005 BETWEEN THE CATEGORIES OF HOUSING, ECONOMIC DEVELOPMENT, NEIGHBORHOOD PROGRAMS AND ADMINISTRATION; ALLOCATING AN ESTIMATED \$1,800,000 IN PROGRAM INCOME TO HOUSING AND ECONOMIC DEVELOPMENT ACTIVITIES; AND SETTING ASIDE \$300,000 FOR VIOLENCE PREVENTION SERVICES.**

SUMMARY

This report transmits to the City Council the evaluation report of the 2002-03 Community Development Block Grant (CDBG) activities, written by Gibson and Associates, and the annual Consolidated Annual Performance and Evaluation Report (CAPER) required by the Department of Housing and Urban Development (HUD). This report also contains the Mayor/City Manager's recommendation of the percentage allocation among eligible CDBG activities for the FY 2004-05 program year.

The evaluation report discusses the impact of programs funded with CDBG and includes a number of findings and recommendations to further enhance the CDBG programs and the future evaluation thereof. Exhibit A is a copy of the Executive Summary and Individual Project Synopses of the Evaluation Report conducted by Gibson and Associates. The full Evaluation Report is available on our website (www.oaklandnet.com/government/hcd) and copies are available for pick-up from Community and Economic Development Agency (CEDA).

As part of efforts to respond to the Gibson report recommending changes to the way housing services are provided, a Housing Related Services Request For Proposal (RFP) was included in the CDBG application. The RFP allocated \$400,000 to cover a range of services that provide

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direct assistance to tenants, including Landlord/Tenant Counseling, legal assistance, fair housing, etc.

The CAPER was submitted to HUD in October to comply with reporting requirements. That report also contains a description of the activities completed with grant funds during FY 2002-03. Exhibit B is a copy of The Narrative Regarding Annual Performance and The Housing and Homelessness Goals & Accomplishments of the CAPER. The full CAPER Report is available on our website and copies are available for pick-up from CEDA.

This report also recommends the allocation of CDBG funds, including program income, among program activities as provided for in the process noted here. The following proportional allocation, based on the FY 2003-04 CDBG grant of \$10,106,000, is recommended for FY 2004-05:

<u>Program Type</u>	<u>Percentage</u>	<u>Anticipated Allocation</u>
Housing	36%	\$3,616,340
Economic Development	24%	\$2,410,750
Neighborhood Programs	25%	\$2,563,010
Administration	15%	\$1,515,900

In addition to this allocation, \$1,800,000 in program income is anticipated to be generated from repayment of housing rehabilitation loans. Of this amount, it is recommended that 80% be allocated to housing activities and 20% to economic development activities.

In relation to the allocations listed above, there has been much discussion around targeting funding for specific services within the Neighborhood Programs allocations. While staff does not recommend adding an allocation requirement that will make the process more complex, the Mayor, City Manager and City Council have made violence prevention a priority for the City of Oakland. Therefore, \$300,000 will be set aside to address the area of violence prevention. A Request for Proposal/Qualification will be available at a later date requesting proposals for programs to provide services for violence prevention.

This report also provides information on the contract with Seneca Center for the provision of mental health treatment services at Oak Knoll. HUD has directed that, because the program to be located in the facility and the number of children to be served is different from that described in the initial funding proposal, information must be presented at a public hearing to make interested citizens aware of the changes and provide an opportunity for them to provide comments to the City.

FISCAL IMPACT

By adopting the allocation of funds as noted, the City Council will determine the proportional allocation of funds for the 2004-05 fiscal year and the activities eligible for funding.

In addition to allocating the new grant funds, the City Manager is recommending that the City Council act now to allocate program income. Inclusion of the allocation now will provide the CDBG review process with more up to date information on the funding available for programs.

The \$1,800,000 in program income is almost entirely derived from residential rehabilitation loan repayments. Smaller amounts come from servicing fees for loans. The amount is an estimate of what we expect to collect during the next fiscal year. If the amount is lower than estimated, the budgets for housing and economic development programs will be reduced.

By allocating \$300,000 to violence prevention programs, the funding available for housing (homeownership) and economic development programs will be reduced, which would require changes to the approved 2004-05 budget.

BACKGROUND

Each year, the City of Oakland receives federal grant funds under the Community Development Block Grant (CDBG) program and other programs. In June 2000 the City submitted to the U.S. Department of Housing and Urban Development (HUD) a Five Year Consolidated Plan for Housing and Community Development, outlining needs, priorities, strategies and proposed actions. Each year, the City prepares an annual action plan prior to the program year, and an annual performance report at the end of the program year. The City has also adopted a citizen participation plan describing the process for involving low and moderate income persons in the development of these plans.

The Community Development District Boards are the core of the citizen participation process and accountable to the Council members who are responsible for the development of procedures for district elections. The District Boards provide input and recommendations to the Citizen Advisory Committee (CAC), Mayor, City Manager and City Council on allocations. In the fall of 2003, the City Council members conducted their District Board member elections and are in the process of designating the Citizen Advisory Committee members. The CAC will receive the staff analysis of projects proposed for funding and with general citizen and District Board input, make recommendations to the Mayor/City Manager. The District Boards, the CAC and the City Council will have the benefit of the evaluations conducted when making decisions. As required by HUD, the City Council will hold two public hearings – one to review program performance and assess community needs (December 16, 2003), and one to review proposed program allocations and obtain additional public input on the proposed annual action plan. Final City Council approval of the annual plan and proposed allocations of funds for FY 2004-05 will occur at the second public hearing, to be held in May 2004.

The City Council has also mandated that programs funded by CDBG funds be evaluated for efficiency and effectiveness. For the past three years, these evaluations have been performed by an outside consultant, Gibson and Associates.

On November 12, 2003, the City Manager held a Community Development Block Grant Town Hall Meeting. The purpose of this meeting was to share with the community the results of the Gibson and Associates evaluation of the FY 02-03 CDBG projects and to gather input from the community on these issues in order to advise the City Council regarding program priorities after receiving citizen input.

The community made the following recommendations and comments around the CDBG program.

Evaluation

- Overall consensus from the Housing Providers that in this last evaluation of their programs there was not a true reflection of the services they provide and Gibson needs to do further research.
- When recommendations are made there should also be some type of implementation plan as a resource to utilize in completing the recommendations.
- There is a need to continue the dialogue around the collaboration of the Housing Related Services since there was not adequate time given.
- When parties collaborate to provide services, as Gibson has recommended, the core competency in providing the services can be lost, too many types of services end up with one agency that is not good at providing any of the services.
- Make sure the evaluation includes information from the clients who receive the services from the programs that receive CDBG funding.
- Need to look at the Section 8 Voucher Program, and identify the gatekeeper over this program.

CDBG Funding Priorities

- Need to develop funding streams that are service specific so that only the agencies who provide those services can apply for the funding.
- Look at the supply side of the services and use this as a basis for funding parameters.
- When developing Request for Proposals and allocating funding for housing, make sure there are also dollars allocated for social programs, parks and recreation, schools, etc.

CDBG Process

- There needs to be adequate staff to develop and process the contracts in a timely manner.
- Contracts should be written in a manner in which there is a way to hold the provider accountable for the services being provided.
- Financial information or any other pertinent information from the applicants should be provided to the District Boards for review prior to their presentation.

KEY ISSUES AND IMPACTS

The City's Consolidated Plan identifies substantial unmet needs for affordable housing, services for homeless families and individuals, economic development, and public services and neighborhood facilities. The City uses federal grant funds to address these needs. However,

these funds continue to be inadequate to address more than a fraction of the total needs. As a result, the annual Consolidated Plan process is used to set priorities among competing needs.

The Community Development Block Grant Program was restructured by the City Council in 2000. At that time, the Citizen Participation Plan was amended and a new structure for the District Councils was implemented. The City Council expressed particular concern about the efficiency and effectiveness of CDBG-funded programs, and directed staff to conduct annual program evaluations to ensure that scarce federal grant resources were being used to their maximum advantage.

PROGRAM DESCRIPTION

I. Status of Community Development District Boards

There are still seven CD District Boards with 15 members each. Some boards do not have a full complement of board members. Selection of the Chairperson and Vice-Chairperson is by appointment of the City Council member or through an election. The boards are receiving orientation, training, and results of the FY 02-03 evaluations, in preparation for making recommendations to the seventeen member Citizen Advisory Committee during the months of January and February 2004.

II. Seventeen Member Citizen Advisory Committee (CAC)

The Citizen Advisory Committee (CAC) role is to recommend to the City Manager which programs to fund from the CDBG Program. CAC recommendations will be made during the month of April 2004. Each Council Member, with the exception of the President who appoints three, is in the process of appointing two representatives to the seventeen member Citizen Advisory Committee.

During December 2003 and January 2004, the Committee will receive orientation and training, and obtain copies of the needs assessments, evaluation results and proposals in preparation for making recommendations to the City Manager.

III. Evaluations

The City contracted with the Oakland-based consulting firm of Gibson & Associates to conduct evaluations of 24 programs assisted with CDBG funds in FY 2002-03. These programs were those that had the highest finding levels, histories of unresolved issues or were newly funded in 2002-03. Attached is a copy of the Executive Summary and Individual Project Synopses of the evaluation report. Copies of the completed document are available for review in the offices of CEDA and the City Clerk and on the city's website. Every elected member of the seven CD District Boards has received a copy of the complete evaluation.

The scope of services for this evaluation includes:

1. An assessment of 24 programs funded through the 2002-03 Community Development Grant Program (CDBG). For 2002-03 this included a deeper scope in the evaluation by increasing the level of field research, client interviews and program observation;
2. An update on the implementation of recommendations made in prior year's evaluations.
3. An in-depth review of six programs that provide fair housing and other counseling and referral services to renters.

The report provides evaluations of specific programs carried out by the City and non-profit agencies and findings and recommendations regarding potential enhancements to the CDBG programs and the evaluation processes. In this year's evaluation, Gibson & Associates provide greater detail in the reports of each program's evaluation and presents the information in a variety of formats to make the report findings more accessible.

The evaluation provides twenty-seven General Findings; in the table below are those that are most significant. The evaluation also provides nine recommendations which are also included in the table, as well as a response from staff.

Findings
1. Housing rehabilitation programs repair unsafe conditions for the low-income homeowner and preserve the community's housing stock. CDBG programs rehabilitated 55 homes, but the cost ratio for the City-operated Home Maintenance and Improvement Program (HMIP) is high.
3. Two first-time homebuyer programs have performed well, assisting 83 mostly low-income Oakland residents to become homeowners and counseling approximately 100 others on predatory lending and managing mortgages in default.
4. Housing services for renters in Oakland receive only 7% of the overall CDBG housing funds. The city uses 56% of its HOME program resources to support renters.
14. Economic development programs are supporting job creation and retention in Oakland, but improved documentation of results is necessary.
15. CEDA's efforts to revitalize neighborhoods are yielding mixed results: Neighborhood Commercial (NCR) is widely recognized among merchants as effective in improving both the appearances and business environment in commercial districts; While proving extremely effective in many neighborhoods, the façade improvement program may require adjustments to increase effectiveness in the most distressed commercial areas.
17. All funded social service agencies have improved their data collection and reporting procedures as a result of the CDBG evaluation. Client satisfaction data gathering is also much improved and as a result project summaries are richer, more detailed and better able to answer City Council evaluation questions.
19. CDBG funds provide critical support services to Oakland families and individuals to address domestic violence and the absence of parental support.
21. CEDA has successfully addressed many problems noted in past year's evaluations: 1) contract language is consistent and objectives are measurable; 2) no funding delays occur once contracts are generated; 3) the client's low-moderate income status is documented; and 4) some performance measures for City programs have been aligned with more meaningful measures.

Recommendations	
1. Analyze and address the causes of the increasing delays in the HMIP. Make transparent the costs associated with HMIP and other CEDA Rehabilitation programs. Response: The delays in the HMIP are cyclical. The delays reported by Gibson were due to an increase in applicants that require an extensive amount of rehab work on their property and require the coordination of work by a number of contractors. However, in this current fiscal year there have been a number of completions of these projects reducing the number of delays. This year's CDBG application provides detailed information breaking down the cost of all CEDA Rehab programs.	
2. The Vacant Housing Program should continue its efforts to combine affordable and market rate units on these difficult blighted lots. Response: The Vacant Housing Program continues to receive CDBG funds and will continue its efforts to combine affordable and market rate units on difficult blighted lots.	
3. As both homebuyer programs have exceeded homeownership goals and demonstrated positive benefits for both clients and the community, they merit continued CDBG support. Response: The homebuyer program will continue to receive CDBG support and the program is looking at further ways to continue and improve the services to benefit both the clients and the community.	
4. Housing services to renters should continue, but restructure the services to consolidate the services, reduce administrative overhead, and to facilitate easier, less confusing entry points into the system. Fund one agency to provide fair housing services in Oakland to centralize services to reduce client confusion and assess difficulties. Response: A Housing Related Services Request For Proposal (RFP) was included in the CDBG application. The RFP allocated \$400,000 to cover a range of services that provide direct assistance to tenants, including Landlord/Tenant Counseling, legal assistance, fair housing, etc.	
5. Oakland Small Business Growth Center (OSBGC) and Oakland Business Development Corporation (OBDC) should increase efforts to document job creation and retention as well as other positive effects of their efforts on the community. Response: Staff has begun and will continue to work with the OSBGC and OBDC to increase their efforts to document job creation and retention, as well as the other positive effects their services have had on the community.	
6. NCR should explore alternatives for financing merchant contributions to the Façade Improvement Program in severely distressed commercial districts. It should also examine whether current City policy requiring removal of visible security features, such as iron gates and bars, should be relaxed in those areas. Response: NCR is exploring alternatives for financing merchant/property owner contributions to the Façade Improvement Program in severely distressed commercial districts that are designated Redevelopment areas. Property owners and business would be offered an enhanced matching grant at 2:1 (2=NCR and Redevelopment Contribution and 1=Applicant's Contribution). Also, staff works with each Façade Improvement Program applicant to explore alternatives to exterior mounted security bars, scissor gates and like devices. Applicants are encouraged to take a comprehensive approach to security that includes burglar alarm systems, security cameras, etc. and not to simply apply exterior barricades on their buildings making it unwelcoming to customers and negatively impacting the commercial district. Façade Improvement Program architects develop designs that offer a variety of ways to address security concerns.	
7. San Antonio Community Development Corporation's (SACDC) Technical Assistance Program should focus on business development issues such as financial and strategic planning, cash flow management, inventory management, and staffing. It should be marketed more aggressively to companies of a suitable size and sophistication level to utilize it. SACDC should develop a strategic and action plan to address the revitalization needs of San Antonio and work with the City to ensure that programs suitable to San Antonio merchants are available. Response: This agency did not receive CDBG funding for FY 2003-04. Based upon the	

recommendations from this evaluation and the District Boards, SACDC is developing a strategic plan.
8. Forward Evaluation Report references to the contract process to Moving Oakland Forward. Response: There has been a vast improvement in the contract process for CDBG. The contracts are now processed through the City approval within 30 days of receipt of all required documentation from the contractor. All contracts, except those where no documentation has been submitted, were processed by 10/31/03.
9. The City should continue the scope of current evaluation activities with the City Manager selecting another program cluster for in-depth review, maintaining the same criteria for selecting programs for project evaluations. Response: While the City would like to continue the scope of the previous evaluation activities to include another program cluster for an in-depth review, the budget for the year's evaluation service (\$100,000) does not allow for it. However, the evaluation services for this year do maintain the same criteria for selecting the programs for project evaluation and the same level of review for those programs receiving an evaluation. Eighteen programs will be evaluated and progress on recommendations from prior evaluation reports will be analyzed.

IV. The Consolidated Annual Performance and Evaluation Report (CAPER)

The Consolidated Annual Performance and Evaluation Report provides information on accomplishments in the City of Oakland, for the program year July 1, 2002 through June 30, 2003, in meeting goals set forth in the Annual Action Plan of the Consolidated Plan for providing affordable housing, supportive services for the homeless and persons with special needs, and non-housing community development. Exhibit B is a copy of The Narrative Regarding Annual Performance section of the CAPER.

The full CAPER includes narrative sections that provide a summary of the City's progress during the reporting period to address the City's stated housing and community development goals and objectives. The information corresponds to each priority area established in the Consolidated Plan published June 27, 2000. Specific information regarding investments and expenditures during the year, as well as specific accomplishments for individuals, is contained in the HUD Integrated Disbursement Information System (IDIS).

Housing and Homelessness

The Five Year Consolidated Plan established priorities and goals for addressing issues of affordable housing and homelessness. These are organized into seven key priority areas:

- Preservation/Expansion of the Supply of Affordable Housing
- Assistance to First-Time Homebuyers
- Housing Rehabilitation and Neighborhood Improvement
- Rental Assistance to Extremely Low Income Renters
- Prevention and Reduction of Homelessness
- Housing for Seniors and Persons with Disabilities
- Fair Housing

In FY 2002-03, 38 units of rental housing for families were completed, with 641 underway. There were 61 units of new ownership housing, with another 195 underway. A total of 160 existing affordable units were preserved, 75 are underway. An additional 82 units of housing for seniors or persons with disabilities were completed, with 154 underway. In cooperation with the Oakland Housing Authority, 307 units of public housing are in the process of renovation. Five year goals for preservation and expansion of the supply of affordable housing will be exceeded.

A total of 97 first-time homebuyers were assisted with the purchase of existing homes. Five year goals for this category will not be met, primarily because rapid increases in sales prices required an increase in maximum loan amounts starting two years ago, which has reduced the number of households that can be assisted.

Rehabilitation work was completed on 32 owner-occupied homes, and 21 are underway. Goals for this program will not be met, in part because of increased rehabilitation costs (especially as a result of costly new federal requirements for abatement of lead paint hazards), and partly because anticipated funding sources did not prove feasible. Minor and emergency repairs were completed on 190 properties; five-year goals for these activities are likely to be met.

With a few exceptions, annual goals for assistance to the homeless were met or exceeded, and most of the five-year goals will be exceeded.

Exhibit B also provides a table with details showing goals and accomplishments for FY 2002-03, and the five-year goals and cumulative accomplishments to date.

Economic Development

Economic development accomplishments for FY 2002-03 include the following:

- The National Development Council assisted in the structuring and approval of development of complex financing structures for approximately 8 projects.
- Business Development assisted 409 businesses to remain in Oakland, retained 4,984 jobs in Oakland, attracted 22 new businesses and created 516 jobs, many of which benefited low and moderated income residents and neighborhoods.
- The Neighborhood Commercial Revitalization (NCR) Program completed 50 façade improvement projects, assisted 800 businesses, provided assistance to 18 merchant associations, implemented 5 streetscape improvement projects in East Oakland, maintained baseline data for 15 NCR areas, and implemented the Main Street program to carry out 4 façade improvement projects in the Eastlake district and 7 façade improvement projects in the Fruitvale district.
- The Oakland Business Development Corporation (OBDC) approved 2 and funded 1 EEC Section 108 loan and approved 12 and funded 8 NEDF loans.

- The Oakland Small Business Growth Center provided technical assistance and business services to micro-enterprise businesses.
- The One Stop Capital Shop made \$2,700,000 in loans and created 77 new jobs, assisted 1,200 clients and sponsored more than 25 different business skills development workshops and seminars.

Public Services and Infrastructure (Neighborhood Improvements)

(A) Public Services

CDBG funds were used for 30 programs operated by 25 private, nonprofit agencies (“subrecipients”) that serve low- and moderate-income persons in the seven Community Development Districts of Oakland. In addition, 7 City-administered programs were funded. The activities are in the categories identified in the Strategic Plan for Non-Housing Community Development Needs contained in the Consolidated Plan for July 1, 2000 to June 30, 2005. The number of programs by category is as follows:

Anti-Crime	4
Employment Training	2
Hunger Relief	2
Senior Services	7
Social Services	2
Substance Abuse Intervention and Prevention	2
Youth Services	13

In addition, one of the subrecipient agreements was not implemented during FY 02-03 due to delay in submission of required data by the subrecipient. Also, because of staff reductions, the Office of Parks and Recreation’s Hip Hop Urban Dance Program and Technology Literacy Program were partially implemented in FY 02-03.

(B) Infrastructure (Neighborhood Improvements)

Consistent with the five-year strategy to meet the needs of low-and moderate-income Oakland residents, funds from the FY 02-03 grant were allocated to 3 private, nonprofit agencies to assist with affordable housing development, design and construction of a community activity center, leasehold improvements for a health care center, capital improvements to a multi-service community center; and commercial façade and street improvements. In addition, renovations were done to two (2) City-owned recreational facilities.

Additionally, the Elmhurst CD District recommended \$54,116 in FY96 CDBG funds to assist Seneca Center with architectural and engineering design costs as well as foundation and other improvements to convert an existing 14,000 square foot building on 8 acres at

Oak Knoll, the former Oakland Naval Medical Center. The initial proposal was for the building to house an educational and mental health treatment facility for two programs serving 174 seriously emotionally disabled (SED) children: the Building Blocks Program for children aged 4 to 6 years, 90-100% of them Oakland residents, located in a leased facility at 2370 Grande Vista place in the Fruitvale District; and the School Age Program for children in grades 1 to 12, 30% of them Oakland residents, located at 2275 Arlington Drive in San Leandro.

For several reasons the contract with Seneca Center has not yet been awarded. Because the location is not in a primarily low- and moderate-income area, an eligibility determination was required from HUD. The Department of the Navy did not approve Seneca Center's application for a public benefit conveyance until November 2001. Internal administrative changes delayed Seneca Center's identifying of the scope of the work.

Because it may be difficult for children and youth with special education needs and emotional and behavioral disabilities to meet the eligibility criteria for the CDBG Program, Seneca Center has proposed a change in the use of the funds. The facility would still house a mental health treatment program but would instead serve the 68 foster children enrolled in Alameda County's Project DESTINY, 54% of whom are placed in Oakland and/or have family of origin ties to Oakland. Removal of the children from their biological/relative homes is because of substantiated abuse/neglect issues, and all of them have serious emotional problems. They would, therefore, meet HUD's presumptive test for abused children.

Although the allocation for Seneca Center went through the review process by the citizen participation bodies and at the City Council public hearing in the development of the FY96 Annual Action Plan, HUD has directed that, because the program to be located in the facility and the number of children to be served are different from that described in the initial funding proposal, information must be presented at a public hearing to make interested citizens aware of the changes and provide an opportunity for them to provide comments to the City. The Elmhurst District Board will review the proposed change in use on December 15 and make a verbal report on the action taken to the City Council on December 16.

V. Request for Proposals (RFP) for FY 2004-05 Funds

The City's Request for Proposals for CDBG funding for FY 2004-05 was available during the week of August 1, 2003. The CDBG Office did a mailing of over 800 applications to individuals and/or organizations from the mailing list that is currently on file. This mailing list includes individuals and/or organizations previously requesting information from the CDBG Office, individuals who are currently serving on CDBG Boards for each District, all providers who are currently receiving CDBG Funding and Councilmembers and aides. The CDBG Application was available on the City of Oakland Website for anyone to download and complete. Also, there was an advertisement in the Oakland Tribune announcing the availability of the CDBG

Application. This advertisement included all the information on how to obtain an application via the City of Oakland Website or to call the CDBG Office and request a copy.

VI. *Proposed Allocation of FY 2004-05 Funds By Program Category*

The Department of Housing and Urban Development (HUD) has not yet notified the City of Oakland of its 2004-05 entitlement amount; however we do have a projected entitlement amount of \$10,106,000. Staff recommends the proportional allocation as follows with the provision that actual dollar amounts in each category may change once HUD notifies the City of its 2004-05 entitlement.

Program Area	FY 2003-04		FY 2004-05	
	Percent	Amount	Percent	Amount
Housing Programs	38%	\$3,816,340	36%	\$3,616,340
Economic Development	25%	\$2,510,750	24%	\$2,410,750
Public Service/Infrastructure	22%	\$2,263,010	25%	\$2,563,010*
Administration	15%	\$1,515,900	15%	\$1,515,900
Total	100%	\$10,106,000	100%	\$10,106,000

* This amount reflects the allocation of \$200,000 from Housing and \$100,000 from Economic Development to violence prevention programs.

In addition to this allocation, \$1,800,000 in program income is anticipated to be generated from repayment of housing rehabilitation loans. Of this amount, it is recommended that 80% be allocated to housing activities and 20% to economic development activities.

In relation to the allocations listed above, there has been much discussion around targeting funding for specific services within the Neighborhood Programs allocations. The concern that critical services needed in each district were not receiving adequate funding or any funding brought about this discussion on targeting funding. This year the services considered critical and designated as a funding priority are programs that provide services around violence prevention. The decision on whether or not to have funding specifically designated to certain services is a policy decision the City Council would need to make. Since adding an allocation requirement will further restrict the ability of District Boards to choose programs and will make the process more complex, we do not recommend implementation of any additional allocation formulas. However, since the Mayor, City Manager and City Council have set services for violence prevention as a funding priority, there is a recommendation that \$300,000 be set aside to address the area of violence prevention. A Request for Proposal/Qualification will be available requesting proposals for programs to provide services for violence prevention. In order to set the \$300,000 aside, there is a reduction of \$200,000 from the Housing allocation which will affect the ability to fund housing activities aimed at owner occupants such as

Rebuilding Oakland Together, Eden Council for Hope and Opportunity (ECHO) and others. There is also a reduction of \$100,000 from the Economic Development allocation which will affect the ability to fund Spanish Speaking Unity Council, Oakland Committee for Urban Renewal (OCCUR) and others. The \$300,000 set aside will increase the Neighborhood Programs allocation, since the funds will ultimately fund violence prevention which falls under that allocation category.

Also, as part of efforts to respond to the Gibson report recommending changes to the way housing services are provided, we recommend allocation of \$400,000 to cover a range of services that provide direct assistance to tenants, including Landlord/Tenant Counseling, legal assistance, fair housing, etc. A number of service providers have submitted individual proposals as part of a collaborative effort to provide tenant services.

There are a number of guiding principles around priorities for awarding CDBG funds. Each proposal submitted will receive a screening to determine that it is complete, to ensure compliance with federal eligibility regulations, to determine the reasonableness of cost and to ensure that each proposal addresses a City Council established priority need. The CD District Boards, the seventeen member CAC, as well as City staff, will utilize the results of the evaluation performed by the Evaluation Consultant; neighborhood commercial revitalization (NCR) efforts; affordable housing developments; and geographical balances in service delivery areas.

SUSTAINABLE OPPORTUNITIES

Economic: As noted in this report, a significant portion of CDBG funds is used to promote economic development, employment, public facilities and infrastructure for the benefit of low and moderate income communities.

Environment: Many activities funded by federal housing and community development grants address such issues as removal of blight, and abatement of environmental hazards such as lead-based paint and other building conditions. Housing rehabilitation and new construction programs encourage contractors to use green building techniques, including energy-efficient design, use of recycled building materials, and water-conserving fixtures and landscaping.

Social Equity: By definition, these programs are targeted to improving conditions for low and moderate income communities.

DISABILITY AND SENIOR CITIZEN ACCESS

Many of the grants and loans funded by federal housing and community development grant funds are used to provide housing, facilities and services for senior citizens and persons with disabilities. All new housing constructed with federal funds must provide accessibility features for persons with disabilities.

RECOMMENDATION

Based on the analysis in the 2000 Consolidated Plan and the above information, staff recommends that FY 2004-05 CDBG funds be allocated in similar proportions that were used for the FY 2003-04 programs, as follows:

<u>Program Type</u>	<u>Percentage</u>	<u>Anticipated Allocation</u>
Housing	36%	\$3,616,340
Economic Development	24%	\$2,410,750
Neighborhood Programs	25%	\$2,563,010
Administration	15%	\$1,515,900

It is further recommended that from the estimated program income of \$1,800,000, 80% is allocated to housing activities and 20% to economic development activities and that \$300,000 is set aside for violence prevention services with a RFP made available at a later date.

ACTION REQUESTED OF THE CITY COUNCIL

Staff requests that the City Council accept this report and approve the attached resolution providing allocations among program categories for fiscal year 2004-05 based on the FY 2003-04 allocation of \$10,106,000 and for the allocation of an estimated \$1,800,000 in program income and setting aside \$300,000 for violence prevention services.

Respectfully Submitted,



DAN VANDERPRIEM

Director of Redevelopment, Economic Development
and Housing

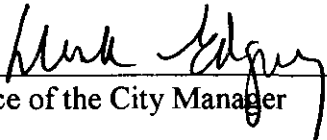
Prepared by:

Roy L. Schweyer, Director
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Michele Byrd, Manager
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Attachments

APPROVED AND FORWARDED TO THE
COMMUNITY AND ECONOMIC DEVELOPMENT
COMMITTEE


Office of the City Manager

OFFICE OF THE CITY CLERK
2003 NOV 25 AM 9:11

Davis

OAKLAND CITY COUNCIL

RESOLUTION No. _____ C.M.S.

INTRODUCED BY COUNCILMEMBER _____

RESOLUTION ALLOCATING AN ESTIMATED AWARD OF \$10,106,000 OF COMMUNITY DEVELOPMENT BLOCK GRANT FUNDS FOR FY 2004-2005 BETWEEN THE CATEGORIES OF HOUSING, ECONOMIC DEVELOPMENT, NEIGHBORHOOD PROGRAMS AND ADMINISTRATION; ALLOCATING AN ESTIMATED \$1,800,000 IN PROGRAM INCOME TO HOUSING AND ECONOMIC DEVELOPMENT ACTIVITIES; AND SETTING ASIDE \$300,000 FOR VIOLENCE PREVENTION SERVICES.

WHEREAS, the United States Department of Housing and Urban Development (HUD) will award an estimated \$10,106,000 of Community Development Block Grant (CDBG) funds to the City of Oakland for the 2004-2005 fiscal year; and

WHEREAS, in addition to this award, it is anticipated that \$1,800,000 in program income will be generated from repayment of housing rehabilitation loans; and

WHEREAS, the Mayor and City Council have made violence prevention a priority for the City; and

WHEREAS, the City Council has established the Citizens Advisory Committee to recommend programs for funding to the City Manager; and

WHEREAS, citizens have provided information about the needs that should be addressed by these funds; now, therefore, be it

RESOLVED: That the allocation of funds for the fiscal year 2004-2005 shall be as follows:

Housing	36%	\$3,616,340
Economic Development	24%	\$2,410,750
Neighborhood Programs	25%	\$2,563,010
Administration	15%	\$1,515,900

and be it

FURTHER RESOLVED: That 80% of program income be allocated to housing activities and 20% to economic development activities, and be it

FURTHER RESOLVED: That \$300,000 will be set aside from the Neighborhood Programs Allocation for violence prevention services with a Request For Proposal made available at a later date, and be it

**COMMUNITY & ECONOMIC
DEVELOPMENT CMTE**
DEC 9 2003

FURTHER RESOLVED: That the Citizens Advisory Committee is directed to recommend programs that provide funding in proportion to the low to moderate income population throughout the CD Districts.

IN COUNCIL, OAKLAND, CALIFORNIA, _____, 2003

PASSED BY THE FOLLOWING VOTE:

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

NOES-

ABSENT-

ABSTENTION-

Attest: _____
CEDA FLOYD
City Clerk and Clerk of the Council
of the City of Oakland, California



Executive Summary

Oakland allocated \$12.5 million¹ through the Community Development Block Grant (CDBG) program for fiscal year 2002/03. The overall goals of this federal program are to:

- Benefit people with low- and moderate-incomes
- Aid in the prevention or elimination of slums or blight, and
- Meet community development needs having particular urgency

Within those parameters, communities have wide latitude to tailor programs to address local conditions and needs. Accounting for 45% of the grant, Oakland's first priority was housing, including the development of affordable housing, rehabilitation of housing, rental assistance for low-income families, housing for seniors and other people with special needs, the prevention and reduction of homelessness, landlord-tenant mediation, and fair housing enforcement. Economic development programs, such as technical assistance to young businesses, façade improvement, and public benefit commercial loans to support business expansion and job creation and retention comprised 25% of the funds. Neighborhood/public service programs including anti-crime, employment training, hunger relief, senior services, substance abuse services, youth services totaled 18%. Last, the remaining 12% of CDBG funds were spent on administration.² To deliver 61 different projects, Oakland contracted with more than 40 community-based organizations and also funded City programs operated by Community and Economic Development Agency (CEDA) and other city agencies such as Oakland Parks and Recreation and Public Works.

As it has since 1999, Oakland selected Gibson & Associates (G&A) to evaluate the CDBG program comprehensively. Unlike previous years when every CDBG-funded program was evaluated, Oakland requested that G&A focus on the 24 programs that had the highest funding levels, histories of unresolved issues, or were newly funded in 2002-03. (See selection criteria in Section VI.) In addition, CEDA specifically asked for an in-depth review of six programs that serve renters and asked that for the 24 programs being evaluated, we deepen the scope of the

¹ The U.S. Department of Housing and Urban Development (HUD) granted the City of Oakland \$10,043,000 and the City contributed an additional \$2,466,443, primarily from loan repayments, loan interest, and reprogrammed funds.

² City of Oakland Consolidated Plan Action Plan, July 1, 2002 – June 30, 2003,

evaluation by increasing the level of field research, client interviews, and program observation. At the request of CEDA and the City Council, we are providing greater detail on the programs' operations and less on CEDA's administration of the CDBG grant and a variety of formats to make the report findings more accessible. As a result, three 'summary' tables were developed, one summarizing findings for all projects (below and in Section VII), another providing an update on all prior evaluation recommendations (Section V), and a Individual Project Synopses format used for all 24 projects evaluated providing a detailed summary of findings for each project (Section VII).

For each program, we answered five questions developed by the City Council and CEDA.

- Did the project maintain and report data adequate to evaluate their goals and objectives?
- Did the project deliver services as described in the goals and objectives?
- Did the clients benefit from services?
- Did the community benefit from services?
- How does the project leverage its fiscal resources?

In preparing answers to these questions, G&A evaluators met with program managers, usually on multiple occasions and observed the programs in operation. Evaluators attended workshops and seminars as well as events in the community that the programs organized or in which they were presenters or major participants. Evaluators also reviewed CDBG contracts, scopes of services, program data and files, and results of agency conducted client satisfaction surveys. Additionally, wherever possible we conducted direct interviews with clients to obtain an independent assessment of satisfaction. Individual program evaluations with one-page summaries are contained in Appendix A and are also available separately at the end of the project overview. Our comprehensive report on the six housing service programs for renters is in Appendix B.

II. Housing Development, Rehabilitation, and Service Programs

Finding #1: Housing rehabilitation programs repair unsafe conditions for the low-income homeowner and preserve the community's housing stock. CDBG programs rehabilitated 55 homes, but the cost ratio for the City-operated Home Maintenance and Improvement Program (HMIP) is high. Determining exact costs is difficult because several programs are paid through one pool of HMIP funds. Since January 2003, completion rates in HMIP have slowed dramatically, averaging an additional 100 days more over the same period a year ago.

HMIP, which is one of the largest CDBG programs with \$2.7 million in CDBG funding, is one of the most improved programs over the last four years. Its huge backlog of uncompleted projects and unprocessed applications, some of which had been pending for years, has been eliminated. Until recently, completion times for processing loan applications and the construction projects themselves had been decreasing consistently with client satisfaction rising. Although HMIP will meet its goals for generating applications and completing projects for 2002-03, we noted over the last six months an alarming increase in the time necessary for these critical tasks, a situation that if not remedied, will likely lead to backlogs once more.

Recommendation #1: Analyze and address the causes of the increasing delays in the HMIP. Make transparent the costs associated with HMIP and other CEDA rehabilitation programs. Consider a more intensive evaluation of CEDA-operated rehabilitation programs that assesses their strategic direction and compares them with best practices found elsewhere.

Finding #2: Affordable housing property development, especially on currently vacant or blighted lots, occurs slowly and to succeed requires flexible solutions and methods combined with a tough-minded goal-oriented approach. CDBG-funded programs had limited success this year and two of these programs, the Vacant Housing Program (VHP) and San Antonio Community Development Corporation (SACDC) have strategies and efforts that have not been successful and should be reassessed.

For 2002-03, only VHP delivered any affordable housing—21 units, of which one was a 17 unit senior development (Downs Memorial) on formerly vacant lots. The developer began work on 20 of these units in 1999. CEDA and that same developer have renegotiated a proposal presented originally in 1999 for 15 particularly vexing vacant lots. He will develop 22 homes on them, 16 of which will be “affordable.” The other six will be sold at market rates.

SACDC was unable to make any progress on two sites that it has been attempting to acquire or otherwise devise a development plan for at least three years. No written plans were developed, as called for in the SACDC objectives, to bring these properties to a decision point. A list of vacant or underutilized properties, another objective, lacked the required photos and necessary detail to be of value.

Recommendation #2: VHP should continue its efforts to combine affordable and market rate units on these difficult blighted lots. Private developers are searching for underutilized properties in Oakland and VHP should consider whether allowing market rate projects might be the best way to make progress. Affordable housing could be pursued in areas where these unusually challenging conditions are not present. VHP should seek an explanation of why the City Attorney has not pursued receivership cases pending for more than 8 months. SACDC's property development activities must be more sharply focused as well as having the flexibility and initiative to shift resources away from a particular property that cannot be moved forward. It must develop a plan for bringing its efforts on these two properties to resolution.

Finding #3: Two first-time homebuyer programs have performed well, assisting 83 mostly low-income Oakland residents to become homeowners and counseling approximately 100 others on predatory lending and managing mortgages in default.

Recommendation #3: As both these programs have exceeded homeownership goals and demonstrated positive benefits for both clients and the community, they merit continued CDBG support.

II.a. Housing Services for Renters at Risk in Oakland

At the request of CEDA, Gibson & Associates (G&A) analyzed the most effective ways to organize and deliver housing related services that target renters at risk, compared that with the cluster of housing services funded through CDBG in Oakland, and is making recommendations for improvements to Oakland's model. The full text of the report and supporting documentation is in Appendix B. CDBG funds (\$465,750 in 2002-03) six community based organizations to provide a variety of services.

As part of its report, G&A analyzed Oakland's rental market, conducted individual evaluations of the six Oakland CDBG-funded programs, and researched effective structures and practices found elsewhere in the U.S. G&A began by conducting an extensive literature review for best practices in fair housing and homelessness prevention. This review led to the identification of nine providers who were able to document outcomes related to housing stability and the prevention of homelessness in communities with comparable demographic and market conditions. G&A researchers then conducted a series of interviews with program staff from each agency.

Finding # 4: Housing services for renters in Oakland receive only 7% of the overall CDBG housing funds.³ The City uses 56% of its HOME program resources to support renters.

Finding # 5: Oakland's housing situation is extreme with rental rates that force tenants to pay too high a proportion of their income. Further, the rental market has a low vacancy rate with generally older housing in danger of deterioration owned by landlords who themselves are often financially unable to address rehabilitation needs.

Finding # 6: Based upon the research methods described above and in more detail in the full report, G&A has found that effective housing services:

- Are organized comprehensively—each agency provides more than one service component, but targets services clients who can benefit most**
- Set measurable standards and goals for increasing housing stability and track and report progress regularly**
- Find and maintain stable housing as a first step—often becoming brokers with landlords**
- Educate both tenants and landlords on rights and responsibilities**
- Perform comprehensive assessments of selected clients to identify and address the range or depth of needs**
- Help clients set long term goals, budget, plan, and gain access to additional services**
- Provide selective case management support to ensure housing stability**
- Monitor and follow-up with clients for six months or more**

Finding # 7: Current housing services for renters in Oakland are in high demand.

Finding # 8: Agencies are mostly meeting their CDBG contractual objectives.

Contractually established goals for the numbers of individuals to be served and units of services provided are being met and often exceeded. Even though these objectives are being met, any agency would have difficulty documenting the extent to which any of these services resulted in longer-term housing stability.

Finding # 9: Agencies providing housing services to renters do not document community benefits from services.

³ See Resource Allocation – Oakland CDBG Housing Funds section of appended report: *Housing Renters at Risk in Oakland: An Evaluation of CDBG – Funded Housing Services for Renters*, Gibson & Associates, May 2003.

Finding # 10: Agencies do not document client benefit nor collect the necessary client satisfaction data.

Client satisfaction data could demonstrate how clients' lives are appreciably improved as a result of the service being delivered. However, none of the programs collect an adequate sample, despite contractual requirements to do so.

Finding # 11: The delivery of housing services to renters is fragmented because so many agencies are involved, creating the following problems:

- Access is impeded*
- Administrative costs are increased*
- Limited client needs assessments are performed*
- Limited follow-up occurs*

Finding # 12: Funding for rental services is limited and little is targeted to cultivating relationships with landlords to increase willingness to rent to low-income residents.

Recommendation # 4: Housing services to renters should continue, but be restructured consolidating services, reducing administrative overhead, and facilitating easier, less confusing entry points into the system.

To reduce or eliminate the present fragmentation of services and the funding of multiple and duplicative administrative costs, G&A recommends that CEDA implement the following recommendations.

Recommendation 4.a. Fund one agency to provide fair housing services in Oakland.

Having two fair housing programs delivering nearly identical services to almost identical clients simply adds administrative overhead into this service component in addition to increasing the difficulty for clients to access.

Recommendation 4.b. Centralize services to reduce client confusion and assess difficulties.

One comprehensive agency with the responsibility to keep, update, and make accessible a comprehensive and accurate housing-related service referral list would reduce the inappropriate referrals occurring presently, providing its staff could master the subtleties of all the housing services.

Recommendation 4.c. Consider developing a Request for Proposal to fund a single "collaborative" or one agency to provide all five services currently available.

Recommendation 4.d. Consider increasing resources for rental assistance guarantees.

Rental assistance is a well-documented contributor to housing stability, and our interviews with model programs bore out the importance of rental assistance in the overall constellation of services.

Recommendation 4.e. Require outcome-oriented goals and objectives and tracking of a significant sample of clients to document effectiveness and expand the practice of conducting test calls to assess the ease of access to the point of entry to the appropriate housing services for each renter.

Recommendation 4.f. Develop and implement outcome-oriented program standards and approaches.

These standards should quantify the number of clients housed over a period time, compliance with dispute resolution agreements, rigor of fair housing investigations, quality of information and referrals, and standards for returning phone calls. Programs should be funded at a level that enables them to address these standards.

Recommendation 4.g. Creatively use CDBG programs and other initiatives to increase low-income housing in Oakland.

Programs such as the Access Improvement Program for the disabled could be marketed to landlords and housing rehabilitation programs extended to rental units. Programs that couple



tenant training in rights and responsibilities with incentives for increased landlord participation in the affordable rental housing market have shown good results, as have programs that link rehabilitation assistance to landlord commitments to continue to rent at rates affordable to low-income tenants.

Implementation of these recommendations will bring Oakland's assistance efforts in line with the most effective programs we found. They will maximize and focus resources in ways that will have the greatest potential for breaking the circle of crisis for some Oakland low-income tenants and ameliorating it for others.

III. Economic Development Programs

Complementing CDBG's housing efforts are activities to promote economic growth. The 2002-03 grant supports programs that address three economic development priorities articulated in the Consolidated Plan:

- Attract, retain, and expand job opportunities
- Revitalize neighborhood commercial areas
- Stimulate private investment to foster Oakland's business growth

Four of its primary CDBG efforts to accomplish these objectives are part of this evaluation: Neighborhood Commercial Revitalization (\$2,207,283); Oakland Business Development Corporation (\$315,000); Oakland Small Business Growth Center (\$225,000); and San Antonio Community Development Corporation (\$80,000). Among the outcomes from this year's efforts were 50 business façade improvements, 40 loans to businesses that lack access to traditional financial institutions, eight jobs created for low-income residents, and 137 people employed through the resident companies at the Oakland Small Business Growth Center.

Finding #14: Economic development programs are supporting job creation and retention in Oakland, but improved documentation of results is necessary.

Recommendation #8: Oakland Small Business Growth Center and Oakland Business Development Corporation should increase efforts to document job creation and retention as well as other positive effects of their efforts on the community.

Finding #15: CEDA's efforts to revitalize neighborhoods are yielding mixed results:

- **Neighborhood Commercial Revitalization (NCR) is widely recognized among merchants as effective in improving both the appearance and business environment in commercial districts, however, merchant associations would like more direct interaction with senior City executives.**
- **While proving extremely effective in many neighborhoods, the façade improvement program may require adjustments to increase effectiveness in the most distressed commercial areas.**
- **While performance may have been affected by delays in contract development, San Antonio Community Development Corporation's (SACDC) revitalization program performed inconsistently and must improve the delivery of its contracted services.**

NCR is meeting or exceeding objectives across a spectrum of activities and receives consistently high marks from merchant associations and façade improvement clients. NCR received overwhelmingly positive responses from clients who testified to the value of NCR staff support and the effects of the new façade on the neighborhood and their businesses. Across the city, NCR supports 15 merchant associations and estimates that it assists approximately 200 businesses each quarter through those activities. Five of the seven association members responding to a client satisfaction survey "strongly agreed" or "agreed" that business conditions had "dramatically" improved. The other two were "neutral."

Members of four associations asked that either senior CEDA managers or other managers, (e.g., from the planning commission), provide periodic briefings to merchant associations. We also recommended that City officials make time to visit merchant associations last year.

An amendment to the contract that NCR manages for San Antonio Community Development Corporation (SACDC) was not approved until December 6, 2002 for a program year that was to begin July 1, 2002. In part, the delay is attributable to time required to negotiate moving SACDC from a program start date of May 1, to a start date of July 1. An advance of a payment for one month of services was made to help 'bridge' services while the new contract was developed. SACDC asserted that despite this advance, delays in generating a contract

adversely affected its performance, as SACDC had neither authority nor adequate funds to undertake some of the activities in its scope of services. CEDA staff asserted that the delay in obtaining a contract should not have affected performance.

Even considering any possible impact resulting from the contract delays, SACDC's overall performance was weak in several critical areas. While SACDC achieved a few successes in restarting the merchant association, helping local businesses obtain loans, and initiating a tree-planting program, its business technical assistance program fell short of the numerical objective of 20 businesses assisted and with a few exceptions, addressed minor issues such as parking tickets. A multilingual business directory was not published and an ongoing street sweeping program was not implemented. A program to certify local businesses to bid on government procurement contracts failed to draw interest and no substitute initiative was developed.

Recommendation #9: NCR should explore alternatives for financing merchant contributions to the Façade Improvement Program in severely distressed commercial districts. It should also examine whether current City policy requiring removal of visible security features, such as iron gates and bars, should be relaxed in those areas. Senior City executives, especially those from CEDA and the Planning Commission, should make additional efforts to visit merchant associations during the year.

Recommendation #10: CEDA and NCR must deliver future contracts to SACDC in a timely manner. SACDC's Technical Assistance Program should focus on business development issues such as financial and strategic planning, cash flow management, inventory management, and staffing. It should be marketed more aggressively to companies of a suitable size and sophistication level to utilize it. SACDC should develop a strategic and action plan to address the revitalization needs of San Antonio and work with the City to ensure that programs suitable to San Antonio merchants are available.

Finding #16: Private investment is encouraged through these CDBG programs, though comprehensive documentation is not readily available.

Both Oakland Small Business Growth Center (OSBGC) and Oakland Business Development Center (OBDC) clearly encourage private companies to invest in Oakland, often in neighborhoods lacking important services. OBDC's clients, distributed throughout the City, include important services such as small restaurants, dry cleaners, bookstores, or hair salons. OSBGC clients are primarily located in its Hegenberger Road location, but are investing and



hiring to build their businesses so they may relocate in their own sites. Through NCR, facades are remodeled, streets improved, merchant associations created and nurtured, business improvement districts formed to address local issues, and blight reduced, all of which encourages investment. One of SACDC's successes this year was assisting a local business obtain a \$1.6 million rehabilitation loan for a property on International Boulevard.

IV. Social Service Programs

Even though social service programs account for only 18% of the total CDBG grant, the broad diversity of services provided makes general findings difficult. Housing and Community Development share a narrower range of program strategies and outcomes than social service programs that serve newborns to seniors, homeless individuals, elementary school children, new immigrants and individuals challenged by a range of disabilities and conditions. Services range from drop in library services, food distribution, tutoring, drug treatment, job training, and recreation. Such a breadth resists generalizations. Nevertheless, several attributes and trends warrant mention.

Finding # 17: All funded social service agencies have improved their data collection and reporting procedures as a result of the CDBG evaluation. Client satisfaction data gathering is also much improved and as a result project summaries are richer, more detailed, and better able to answer City Council evaluation questions.

Finding # 18: Social service programs generally leverage funds well to increase the value-added from their CDBG grant.

Finding # 19: CDBG funds provide critical support services to Oakland families and individuals to address domestic violence and the absence of parental support.

Finding # 20: Immigrant support services are providing critical assistance, but would benefit from increased focus in job training programs and better documentation of educational achievement.

Much can be said of the vast majority of social service agencies evaluated this year. While certainly areas exist in which most programs could improve their effectiveness, given the challenges posed by the populations served and the conditions under which community based agencies operate, the City should feel comfortable that the vast majority of its CDBG funds for social services programs are well spent.



V. CDBG Administration & Evaluation

The 2001-02 CDBG evaluation contained an extensive report on the City's administration practices. With the exception of contracting procedures, which continue to cause delays in project implementation, this year's evaluation did not focus on administration. Nonetheless, we note the following:

Finding # 21: CEDA has successfully addressed many problems noted in past year's evaluations: 1) contract language is consistent and objectives are measurable; 2) no funding delays occur once contracts are generated; 3) the clients' low-moderate income status is documented; and 4) some performance measures for City programs have been aligned with more meaningful measures.

In meetings with CEDA staff in June, researchers were told of several changes to the contract process that should reduce the delays in the future. Specifically, two-year contracts are being initiated, which will reduce the number of contracts being processed each year. In addition, changes are being made to the RFP to allow the proposal itself to serve as the contract scope of work. The number of signatures required on a contract has been reduced. Finally, Moving Oakland Forward has taken a leadership role in trying to find other ways to reduce the time required to process contracts.

Nonetheless, for the period being evaluated in this report, delays executing contracts were still prevalent. As the table that follows illustrates, far too much time was required to process contracts for the 2002-03 program year. Table I summarizes the amount of time taken to *develop, submit and obtain* approval of a completed contract to CEDA with all the appropriate attachments, assurances, scope of work, etc. Column 4 lists the number of days from the beginning of the program year (July 1) until a contract has been approved by the City. Column 5 lists the number of days it took for a contractor to submit appropriate and completed documents to process the contract through the City approval process. Column 6 lists the number of days required for the City to obtain all the required approvals for a completed contract. CEDA is to be commended for generating this data as it provides a valuable benchmark against which future progress can be measured.

Taken together, the entire process requires an average of 153 days, or almost five months for a 12-month program year. This time frame does not fully capture the time involved in developing contracts, as agencies are notified of funding earlier in the spring and begin developing their



contracts in May and June. This table, based on CEDA's information, does not include all the projects for which a contract was developed. Researchers were given differing interpretations of the causes of these delays. While acknowledging that the system is too complex and that the CDBG program lacks an adequate number of staff to process contracts expeditiously, CEDA staff also point to community based agencies that frequently submit documents incorrectly and/or fail to respond quickly to requests for clarification or revisions to contracts. On the other hand, representatives from community based agencies interviewed during May asserted that delays were most often the result of the City's complex contract requirements, unresponsive staff, and protracted bureaucratic processes. Interviews with agencies contracted through the Oakland Fund for Children and Youth indicated that they had little difficulty getting contracts processed.

Table 3: Summary of Number of Days from Start of Contract Year (July 1) until a contract has been approved (Column 4), the number of days from July 1 to required to submit a complete contract (Col. 5) and the number of days required by the City to move contracts through the signature process once a completed contract had been submitted.

Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6
Contractor	Years W/CDBG Funding	Contract Year Begins	Days Lapsed From July 1 Until Final Approval	Days Required by Contractors to Submit Complete Contract Paperwork	Days Lapsed from Rec't by CEDA To Final Approval
A safe place	Unknown	1-Jul-02	84	16	68
Alameda county comm. Food bank	12	1-Jul-02	158	101	52
Alameda county health care foundation	8	1-Jul-02	221	148	73
Alzheimer's services of the east bay	5	1-Jul-02	141	81	60
Bay area community services	3	1-Jul-02	107	78	29
Camp fire boys and girls	14	1-Jul-02	44	18	26
Castlemont culinary arts academy	First	1-Jul-02	Need Approval By City Council		
Castlemont teen center acquisition	First	1-Jul-02	Need Approval By City Council		
East bay central american refugee committee	First	1-Jul-02	141	105	35
Family violence law center	13	1-Jul-02	141	93	48
Fred Finch Youth Center	First	1-Jul-02	78	42	35
Contract being executed by public works and will require a memorandum of understanding					
Friends of Perata Hacienda Historical Park	Unknown	1-Jul-02			
Girls inc.	First	1-Jul-02	170	134	35
Grandparents and relatives as second parents	First	1-Jul-02	141	105	35
Healthy babies	3	1-Jul-02	272	246	26
International institute of the east bay	First	1-Jul-02	107	80	27
Jobs consortium	5	1-Jul-02	141	108	33
La clinica de la raza	Unknown	1-Jul-02	141	107	34
Laurel jujitsu	First	1-Jul-02	272	227	45
Law center for families	Unknown	1-Jul-02	189	108	81
Legal assistance for seniors	9	1-Jul-02	58	16	42
Life long medical	9	1-Jul-02	170	134	35
Oakland ReLeaf	First	1-Jul-02	Letter sent 1/22 and 2/4 specifying information required.		
Phase III	First	1-Jul-02	77	16	61
Project Re-Connect	10	1-Jul-02	134	73	61
Project Seed (6 Contracts)	19	1-Jul-02	182	17	165
San Antonio CDC	14	1-May-02	215	175	40
Requesting Contract put on pending status due to extended medical leave of Executive Director					
Schuman-Liles Clinic	First	1-Jul-02			
Spanish Speaking Citizens Foundation	Unknown	1-Jul-02	272	17	255
Sports4Kids	first	1-Jul-02	141	109	32
St. Mary's Center	5	1-Jul-02	154	116	38
The First Place Fund for Youth	First	1-Jul-02	107	84	23
United Indian Nations	First	1-Jul-02	238	207	25
Total Days			4,286	2,761	1,525
Average Days			153	99	54

On the surface, OFCY has a very similar task to that of CDBG, contracting with 56 community agencies and with funding of roughly the same amount as CDBG. However, it was outside the scope of work for researchers to conduct a detailed examination of why OFCY contracts are processed more quickly. There may well be good reasons why CDBG contracts take longer than OFCY, but G&A's research last year indicated that every other jurisdiction we reviewed processed contracts much more expeditiously. We recommend that CEDA and/or Moving Oakland Forward explore these issues. A more detailed discussion of the contract issue can be found on pages 54-61. It is recommended that City Council staff review these pages carefully.

Finding # 22: Despite CEDA efforts to improve the contract process, the time required to complete contracts is unnecessarily long and extremely complex, requiring an average of 5 months to fully process a contract. This is clearly the most serious problem CEDA management faces in administering the CDBG program and adversely affects program performance and CBO morale throughout.

Finding # 23: Under City regulations, no service is to be provided until an executed contract is in place, a regulation that is broadly ignored and tacitly acknowledged by City staff. Strict enforcement of these regulations would lead to the complete collapse of CDBG services in Oakland. No funds are paid to any of the CBOs until a contract is executed, creating annual cash flow crises, some of dire proportions, throughout the CBO community.

Finding # 24: Even agencies with many years of CDBG experience and whose contracts vary less than 5% in content from the content of previous years, have significant difficulty processing contracts.

Finding # 25: The number of department approvals in Oakland far exceeds the number required in other jurisdictions. Eight weeks required simply to route a completed contract through the approval process is unwarranted and unreasonable when compared with other public entities.

Finding # 26: The City has presented no reasonable justification for the complexity of the contracts, the number of signatures required, or the mounting disruptive delays. As researched and documented thoroughly in last year's evaluation report, other cities and public jurisdictions process contracts in a reasonable time frame. These jurisdictions are just as concerned about their liability and accountability.⁴

We fear that with cuts in CDBG administrative staffing, delays may become still more prevalent. The new CDBG Program Manager has made progress in documenting the time expended in the contract process and is clearly committed to making improvements, but so many departments outside her authority are involved in the process that expecting her alone to repair this system is unrealistic and unfair.

⁴ Ibid. pps. 30-35.

Recommendation # 11: Forward Evaluation Report references to the contract process to Moving Oakland Forward. We encourage Moving Oakland Forward to consider the following changes that would likely significantly improve the contract process:

- Meet with staff from with one or more of the public agencies that manage more efficient contracting processes (e.g. OFCY, City of Hayward, Alameda County Department of Social Services) to determine how process contracts more efficiently and more quickly and adopt appropriate procedures.
- Completely replace the current contract boilerplate with language common in other public jurisdictions.
- Ensure at least three weeks notice to agencies for any mandatory meeting relating to the application or contracting process.
- Eliminate at least four required signatures on CDBG contracts.
- Establish a system that reassigns CEDA staff (for one or two months) to review contract packets and provides any necessary support to ensure that contracts are processed within 60 days.
- Use the performance review process to identify benchmarks for how quickly contracts should be processed and approved, make specific individuals accountable for these benchmarks and reassign staff who consistently impede rather than expedite the contract process. At a meeting with CEDA staff reviewing a draft of this report, staff indicated that this step has been taken. We are encouraged by this development.
- Establish an 8-week City deadline to process and approve all CDBG contracts.

This Year's Evaluation

Since 1999 G&A has provided the City of Oakland with a comprehensive assessment of the CDBG program, including a thorough review of the administration and all of the funded projects. Based on feedback from City Council and CEDA, G&A pilot tested a new evaluation system for 2002-03.

Goals:

- Develop a more accessible format for presenting evaluation findings, recommendations, and the status of implementation of prior recommendations.
- Focus evaluations on a smaller sample of CDBG-funded agencies to provide more in-depth analysis of program activities.
- Recognize and address the needs of the different audiences (City Council, CEDA, Community Development District Boards and Individual Project Managers of CDBG-funded programs) for the evaluation.
- Integrate evaluation/monitoring functions, expanding the scope of the City's monitoring process to ensure sufficient review of projects that are not evaluated.



- Conduct one extensive evaluation of a cluster of related programs and services to assess how well they are delivered.

- Submit the evaluation and monitoring reports in June to allow information to inform the development of the next year's contracts, eliminating a year's gap between evaluation findings and contract generation.

Finding # 27: Changes in this year's evaluation have produced a more accessible evaluation report that also provides more client outcome data and richer project summaries. Yet, integration of evaluation and monitoring has not been fully realized and the monitoring process while significantly improved, does not as yet examine the quality of program operations or their impact on clients or neighborhoods.

Recommendation # 12: The City should continue the scope of current evaluation activities, with the City Manager selecting another program cluster for an in-depth review, maintaining the same criteria for selecting programs for project evaluations, and implementing Recommendation 13 below calling for quarterly meetings to review progress in the implementation of recommendations approved by the City Council. To maximize the impact of the evaluation, the evaluation should begin in July, something that has yet to occur.

Although progress was made in finding ways to integrate the evaluation and monitoring process, G&A does not believe that the CEDA monitoring process has advanced sufficiently to ensure that programs not being evaluated but operating below standards will be identified. The monitoring process remains largely focused upon verifying that City and HUD legal requirements regarding program policies and expenditures are met and that proposed services were delivered. As yet, monitoring does not examine the quality of program operations or the impact upon the clients or community.

As in past years, the evaluation contract was not implemented until over half of the program year had passed. This limits the time frame for evaluators to work with projects to be evaluated, limits the level of field research, and restricts the time available for conducting client interviews and program observation. It also limits the amount of time agencies have to produce data for the evaluators. As a result, this year well over half of the programs provided their data after the deadline stipulated in their scope of work. This compromises the quality of the evaluation.

VI. Individual Program Summaries



Most projects delivered services as proposed and adequately documented their service activities. Agency services range widely in their mission and activities and comparisons among most of them are frequently misleading. The comparisons are between the agency's performance and its own objectives. Please see Section VI for the one-page synopses of each project evaluated and the full evaluations in Appendix A for the details of the objectives, services provided, data collected, and client and community benefits established.

In **Table 2** below, a finding of "established" indicates that the client produced data that strongly indicates community or client benefit while "likely" under either "client" or "community" benefit suggests we received sufficient evidence that interventions and/or services of the type and quality being provided will likely result in positive outcomes. "Unknown" indicates that we do not have adequate current project year data to support the finding that the client group served by the project experienced benefits that are quantifiable. Our individual project reports specify the outcomes (benefits) to be expected and the preferred methods of tracking or documenting these outcomes. Frequently the number of clients served column contains a range. Many agencies deliver several types of services to different clients within the project. The minimum number listed reflects clients who receive the most intensive level of service. Table 2 presents a very general appraisal of how projects performed in relation to City Council evaluation questions. Section VII provides a more detailed, one-page analysis for each program that may prove more useful for assessing the degree to which a program has met its goals and objectives and achieved measurable client and community impact.

Agency Name	CDBG Funds 200-03	Data Reported	Services Delivered	Client Benefit	Community Benefit	Fiscal Resources Leveraged
ACORN Housing Corporation	\$30,000	Yes	Delivered	Established	Established	Yes
East Bay Central American Refugee Committee	\$34,000	Yes	Partially delivered	Short term benefits established	Likely	Yes
Lao Family Community Development	\$100,000	Yes	Exceeded objectives	Established	Established	Yes
Grandparents and Relatives as Second Parents	\$74,118	Yes	Delivered as proposed	Short term benefits established	Likely	Yes



Agency Name	CDBG Funds 200-03	Data Reported	Services Delivered	Client Benefit	Community Benefit	Fiscal Resources Leveraged
First Place Fund for Youth	\$73,725	Yes	Delivered as proposed	Short term benefits established	Established	Yes
Phase III. Substance Abuse Recovery Program	\$60,000	Yes	Exceeded objectives	Short term benefits established	Likely	Yes
Family Violence Law Center	\$54,912	Yes	Delivered as proposed	Short term benefits established	Likely	Yes
International Institute of the East Bay	\$32,000	Yes	Delivered as proposed	Likely	Likely	Yes
Girls, Inc. of Alameda County	\$48,500	Yes	Exceeded objectives	Short term benefits established	Likely	Yes
Life Enrichment Agency - Technical Literacy Program	\$17,143	Partial	Partially delivered	Likely	Likely	Yes
Community Development Corporation of Oakland	\$40,599	Yes	Delivered as proposed	Likely	Likely	Yes
CEDA - Home Maintenance Improvement Program	\$2,700,00	Yes	Partially delivered	Established	Established	Yes
CEDA - Vacant Housing Program	\$245,000	Partial	Few services delivered as proposed	Likely	Likely	Yes
Rebuilding Together with Christmas in April ⁵	\$50,000	Yes	Delivered as proposed	Established	Likely	Yes
CEDA - Neighborhood Commercial Revitalization	\$2,207,283	Yes	Delivered as proposed	Established	Established	Yes
ECHO- Rental Assistance Program	\$60,764	Yes	Delivered as proposed	Established	Likely	Yes
Center for Independent Living- Housing	\$99,750	Yes	Partially delivered	Likely	Likely	Unknown
Housing Rights, Inc.	\$60,000	Partial	Partially delivered	Unknown	Likely	Yes

⁵ In this project the major deliverable, (i.e., renovation of 20 private homes of Oakland seniors) was scheduled to occur after the evaluation research and data collection period, and so the client and community benefit was determined likely but indeed would, based on past performance, have been otherwise established.



Agency Name	CDBG Funds 200-03	Data Reported	Services Delivered	Client Benefit	Community Benefit	Fiscal Resources Leveraged
Sentinel Fair Housing	\$130,000	Yes	Delivered as proposed	Unknown	Likely	Yes
EDEN I & R - Housing	\$50,000	Yes	Delivered as proposed	Likely	Likely	Yes
East Bay Community Law Center – Housing	\$99,750	Yes	Exceeded objective	Likely	Likely	Yes
Oakland Small Business Growth Center	\$225,000	Yes	Delivered as Proposed	Likely	Yes	Yes
Oakland Business Development Corporation	\$315,000	Yes	Delivered as Proposed	Established	Established	Yes
San Antonio Community Development Corporation	\$80,000	Partial	Partially delivered	Unknown Minimal, at best	Minimal	Yes

VIII. Conclusion

Over the past four years of evaluation, Oakland can take pride in the significant assistance that CDBG-funded programs have rendered to the community. No single program can address, let alone remedy, all of the community's housing, economic development, or social service needs, but the programs now are clearly targeting priority issues. All the programs are much more highly focused on measurable objectives and outcomes than in 1999 and provide data to demonstrate their effectiveness. We have identified several critical deficiencies that require focused remediation efforts, primarily the City's contracting procedures and its structure for funding services to renters at risk. The issues are defined and concrete solutions proposed for further action.

Former Health, Education, and Welfare Secretary John Gardner noted:

Excellence is not a gift from the gods. It is a human trait that is acquired only by relentless training and ruthless self-assessment. We do not do a good job because we already have virtue or excellence. It's the other way around. We do a good job because we have met a whole range of standards, over and over again, and because we know how to tackle the task of meeting new ones. We are what we repeatedly do. Excellence is not a glamorous or singular achievement. It's a habit.



VII.a. Individual Project Synopses

This section contains a synopsis of each of the 24 CDBG projects evaluated in the 2002-03 year. Each of these summaries also is displayed as a "face sheet" appearing at the front of the individual project evaluation report in Appendix A. These one-page summaries were developed in response to City Council requests for a more accessible and abbreviated summary of program performance.

Agency	Project	Page
ACORN Housing	Homeownership Counseling, Education & Support	74
Center for Independent Living	Disabled Housing Search & Counseling	75
Community Development Corporation of Oakland	Acquisition & Rehabilitation, Vacant Lot Development & Community Fair Housing	76
CEDA	Home Maintenance & Improvement Program	77
CEDA	Neighborhood Commercial Revitalization	78
CEDA	Vacant Housing Acquisition & Rehab Program	79
East Bay Central American Refugee Committee	Youth & Family Enrichment Program	80
East Bay Community Law Center	Housing Advocacy Project	81
ECHO	Rental Assistance Program	82
Eden Information & Referral	Housing Outreach/Information Access	83
Family Violence Law Center	Domestic Violence Prevention Project	84
First Place Fund for Youth	Emancipation Training Center	85
Girls, Inc.	GIRLStart	86
Grandparents & Relatives as 2 nd Parents	Getting A Grip	87
Housing Rights, Inc.	Comprehensive Fair Housing Services	88
International Institute of the East Bay	Caregivers Job Training & Placement	89
Lao Family Community Development	Multilingual Homeownership Center	90
Life Enrichment Agency Oakland Parks & Rec.	Technology Literacy Program	91
Oakland Business Development Corporation	Small Business Lending	92
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Phase III	Substance Abuse & Recovery Program	94
Rebuilding Together	Rebuilding Together/Christmas in April	95
San Antonio Community Development Corporation	Small Business Neighborhood Commercial Revitalization	96
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**COMMUNITY & ECONOMIC
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ACORN Housing Corporation

ACORN Housing Corporation Agency	Homeownership Counseling, Education and Support Project	\$30,000 2002-03 Funding	Citywide Districts
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Project Description: Provides comprehensive housing counseling to first time homebuyers with low and moderate incomes

Evaluation Findings

Objectives	Services – Partially delivered two objectives, exceeded one	Data - Adequate to evaluate progress on goals an objectives	Client Benefit - Established	Community Benefit - Established
Assist clients to obtain loans; correct mortgage delinquencies; and overcome problems caused by predatory loans	<input type="checkbox"/> Provided 18 first – time homebuyer workshops for 159 clients	<input type="checkbox"/> Records of clients' finances, loan applications and approvals	<input type="checkbox"/> Clients interviewed reported that ACORN was instrumental in helping buy homes	<input type="checkbox"/> 65 families with low-incomes have been assisted in purchasing homes.
	<input type="checkbox"/> Provided delinquency and default counseling to ten people	<input type="checkbox"/> Documentation of predatory lending claims	<input type="checkbox"/> One third of the attendees at the homebuyers workshop were surveyed and uniformly reported that the workshops were helpful	<input type="checkbox"/> Homeownership brings stability and increased civic responsibility to a community.
	<input type="checkbox"/> Counseled 33 homeowners on ways to avoid predatory lending and obtain reasonable terms on financing	<input type="checkbox"/> Evaluator review of ten client files for verification of above documentation		<input type="checkbox"/> The community benefits when families who are subject to predatory lending and then housing loss, are protected from these practices
	<input type="checkbox"/> Counseled 26 recipients of predatory loans and assisted 6 people to refinance	<input type="checkbox"/> Sign-in sheets from homebuyer workshops to document attendance		

Evaluator's Recommendations:

- Consider devoting more resources to predatory lending where the objective was not met.
- Ensure that the physical space is quiet enough to conduct the workshops scheduled in it.
- Determine whether homebuyer program clients need more help understanding the home buying process and next steps.
- Survey client satisfaction with all service components, including the predatory lending counseling program.
- Routinely request client permission to disclose names to evaluator for interview.

Center for Independent Living

Center for Independent Living Agency	Disabled Housing Search & Counseling Project	\$99,750 2002-03 Funding	Citywide Districts
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Project Description: Assist "consumers" (clients) with disabilities to find or retain affordable and accessible housing.

Evaluation Findings

Objectives	Services - Partially delivered	Data - Adequate to evaluate progress on goals and objectives	Client Benefit - Likely	Community Benefit - Likely
Provide housing search & counseling services for persons with disabilities.	<input type="checkbox"/> Provided individual counseling for 230 individuals and 5 housing skills workshops per year.	<input type="checkbox"/> Client satisfaction feedback (questionnaire results) from 9% of clients <input type="checkbox"/> Project manager verbal report of 25 housing placements made	<input type="checkbox"/> Agency reported that 25 housing placements were made. <input type="checkbox"/> Client satisfaction information from 9% of those served documents a high level of satisfaction with quality of the staff and services provided by CIL staff.	<input type="checkbox"/> Historically, CIL has played a seminal role in introducing and getting national legislation passed for accessibility for people with disabilities and the East Bay is a community that is considered a model of accessibility as a result.
	<input type="checkbox"/> Provided transportation in the form of 36 trip vouchers.	<input type="checkbox"/> Monthly narrative summaries from the executive director of CIL	<input type="checkbox"/> 75% clients reported CIL helped them arrange an appointment with a landlord, look at potential housing and/or fill out a housing application	<input type="checkbox"/> Likely, an increased housing for persons with disabilities will result in a decrease in homelessness for this population.
	<input type="checkbox"/> Increased the collaboration with other agencies to increase available housing for clients with disabilities.	<input type="checkbox"/> Client files with names removed	<input type="checkbox"/> Consumers & landlords receive advocacy regarding their rights & responsibilities.	<input type="checkbox"/> Likely the community benefits from access to information and education
	<input type="checkbox"/> Increased community knowledge of CIL housing & independent living services through a variety of media and outreach activities.	<input type="checkbox"/> One-on-one telephone interviews with clients & site observation of housing "workshop"		

Evaluator's Recommendations:

- Continue collaboration with Eden I & R to share housing database resources and approach and to educate landlords about housing issues specific to the disabled community, including discrimination education and increasing the number of available wheelchair accessible units.
- Measure knowledge gained from housing skills workshops.
- Continue providing alternative formats for the CDBG client satisfaction survey, such as large print and/or Braille and making materials available in Spanish, Chinese and other languages spoken by clients.
- Work more intensively with disabled clients for whom housing search or housing discrimination based on disability is the presenting issue. Longer term tracking of clients where possible.

Community Development Corporation of Oakland

Community Development Corporation of Oakland	Acquisition and Rehabilitation, Vacant Lot Development, and Community Housing Fair	\$40,599	North Oakland Districts
Agency	Project	2002-03 Funding	

Project Description: The development of affordable housing and revitalization of neighborhood commercial districts.

Evaluation Findings

Objectives	Services - Delivered as proposed	Data - Adequate to evaluate progress on goals and objectives	Client Benefit - Likely	Community Benefit - Likely
Concentrate housing development efforts on smaller vacant lots or those with severely dilapidated structures	<input type="checkbox"/> Developing eight to ten units of housing in Oakland	<input type="checkbox"/> Detailed records are maintained on all project activities. They include: extensive files of applications for financing and regulatory approvals by the City and State of California.	<input type="checkbox"/> The project will likely benefit Oakland's low- and moderate - income residents who eventually inhabit the affordable housing units.	<input type="checkbox"/> The community will benefit from the completion of these housing development projects, which will otherwise not have occurred.
Improve three Oakland properties that could lead to the development of 10-12 units of housing	<input type="checkbox"/> Developing two additional single family dwellings	<input type="checkbox"/> Records of exhibitors and number of attendees of Housing Fair	<input type="checkbox"/> The project is on track with the development efforts of these affordable housing units.	<input type="checkbox"/> When housing becomes available in a neighborhood, it often leads to the "synergistic" effect of the upgrading of other properties in that neighborhood.
Provide general public with information about resources such as: housing, banking, schools, emergency food and first - time home buying	<input type="checkbox"/> Funded and organized the North Oakland Community Housing and Information Fair with 22 exhibitors and attended by over 100 people			

Evaluator's Recommendations:

- Continue to pursue the acquisition of the adjacent vacant lots to the properties currently being developed, to increase the number of housing units by 33.
- Continue to explore the feasibility of additional financing through joint venture partners and Section 202 grants from HUD and/or tax credits

Home Maintenance Improvement Program

Community and Economic Development Agency	Home Maintenance Improvement Program	2.7 million 2002-03 Funding	Citywide Districts
Agency	Project		

Project Description: This program makes loans and provides hiring and management services of contractors to rehabilitate the homes of seniors and disabled residents of Oakland.

Evaluation Findings

Objectives	Services - All but one service delivered as proposed	Data - Adequate to evaluate the progress on goals and objectives	Client Benefit - Established	Community Benefit - Established
Originate 60 loan applications Assess project viability for eligible loan applicants and provide full written evaluation within 30 days	<input type="checkbox"/> HMIP exceeded the number of loan applications received and processed (82 loans as of March 2003, vs. a projected 60). <input type="checkbox"/> HMIP determining project viability and found 37 to be feasible.	<input type="checkbox"/> Records of loan applications and approvals maintained and verified by the evaluator	<input type="checkbox"/> 35 homeowners will have dangerous safety and unhealthful conditions in their homes ameliorated.	<input type="checkbox"/> Preserving the quality of the housing stock in areas where the most vulnerable residents live
Complete 35 home rehabilitation projects	<input type="checkbox"/> HMIP is on track, having completed 28 rehabilitation projects by March 31, 2003.	<input type="checkbox"/> Records verifying income levels of loan recipients <input type="checkbox"/> Before and after photographs	<input type="checkbox"/> These homeowners (i.e., seniors and people with disabilities) with low incomes will be able to remain in their homes.	<input type="checkbox"/> Enabling seniors with low incomes to avoid the need for expensive assisted living residences
Maintain an average of 180 days or less between loan closing and project completion	<input type="checkbox"/> The average number of days between loan closing and project completion is 308, a third longer than projected.	<input type="checkbox"/> Records of loan application processing schedule and time between loan approval and project completion	<input type="checkbox"/> 90% of clients surveyed rated the staff support from HMIP positively.	<input type="checkbox"/> Perhaps enhancing housing values in surrounding community
Survey client satisfaction	<input type="checkbox"/> A good sample of clients (between 33 - 50%) was surveyed for their satisfaction.	<input type="checkbox"/> Results of client satisfaction survey reported	<input type="checkbox"/> Most clients were extremely pleased with the construction work in their homes.	<input type="checkbox"/> Perhaps stimulating neighbors to improve their properties

Evaluator's Recommendations: The City's goals for this program, considering its cost, should be threefold: 1). Operate the program as efficiently as possible; 2). Maximize the dollars that reach the residents in need; and 3). Minimize the administrative costs. In order to do this G & A recommends:

- Reduce the project completion times to the goal of 180 days from final loan approval.
- Explore the use of software to simplify writing construction specifications.
- Remove the administrative costs for programs (other than HMIP) from the HMIP budget to allow for a clear assessment of each project's efficiency and effectiveness relative to its cost.
- City Council and senior CEDA executives review HMIP performance regularly
- Have a more thoroughgoing analysis of HMIP, reviewing other similar projects, interviewing key informants, and determining how it measures against the most effective practices for this type of project
- Continue to collect client satisfaction data, perhaps through periodic focus groups or interviews with clients.

Neighborhood Commercial Revitalization

Community and Economic Development Agency (CEDA) Agency	Neighborhood Commercial Revitalization (NCR) Project	\$2,207,283 2002-03 Funding	Citywide Districts
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Project Description: NCR attempts to remove blight and improve the physical appearance of property within fifteen of Oakland's commercial districts.

Evaluation Findings

Objectives	Services - 100% delivered as proposed.	Data - Adequate to evaluate progress on goals and objectives	Client Benefit - Established	Community Benefit - Established
Overcome obstacles to economic revitalization in 15 business districts in Oakland	<input type="checkbox"/> On track to complete 50 façade improvements by June 30, 2003 <input type="checkbox"/> Provided technical assistance to 18 merchant associations	<input type="checkbox"/> Status report on implementation of façade improvements	<input type="checkbox"/> 80% Façade improvement clients were surveyed - very satisfied with services	<input type="checkbox"/> Merchant associations believe that business and physical climate of neighborhoods improved
Stimulate strategic partnerships with business, property owners, and community organizations	<input type="checkbox"/> Monitors implementation of five streetscape improvement projects in East Oakland	<input type="checkbox"/> Merchant meeting agendas and promotional material. <input type="checkbox"/> Contracts for activities on improvement projects	<input type="checkbox"/> Telephone interviews with evaluator - businesses improved	<input type="checkbox"/> More vibrant retail sector leads to improved use of local goods and services
Reduce blight and improve physical appearance of property within districts	<input type="checkbox"/> Developed and monitored contracts to provide assistance to small businesses including cost-free architectural design	<input type="checkbox"/> Status memo on technical assistance to Business Improvement Districts	<input type="checkbox"/> 50% of merchants were surveyed - very satisfied	<input type="checkbox"/> Growing businesses provide employment opportunities and tax revenues
	<input type="checkbox"/> Leveraged funding for Fruitvale and Eastside Main Street improvements <input type="checkbox"/> Provided technical assistance to five Business Improvement Districts <input type="checkbox"/> Coordinated two planning/design studies	<input type="checkbox"/> Shopping profile data <input type="checkbox"/> Urban planning studies <input type="checkbox"/> Before - after photos <input type="checkbox"/> Client satisfaction - 2 surveys		<input type="checkbox"/> Façade renovations in one are inspiring to neighbors to do the same

Evaluator's Recommendations:

- City staff participate in merchant association meetings.
- Explore additional financing in neighborhoods where economic recovery is slow.
- Re-examine requirement to remove exterior security features in neighborhoods where security features are warranted.
- Examine complaints about payment and processing delays.
- Continue data collection and evaluation of project implementation.

CEDA Vacant Housing Acquisition and Rehabilitation Program

Community and Economic Development Agency Agency	Vacant Housing Acquisition and Rehabilitation Program Project	\$245,000 2002-03 Funding	Citywide Districts
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Project Description: Providing gap financing, transfer lots to private developers, and seek court-appointed receivers to rehabilitate the most difficult blighted vacant properties in Oakland.

Evaluation Findings

Objectives	Services – Many services were not able to be delivered as proposed	Data – Partial data available to evaluate progress on goals and objectives	Client Benefit – Likely	Community Benefit – Likely
Generate 35-50 applications for gap financing and approve loans for 20 – 30 units by June 30, 2003	<input type="checkbox"/> Applications for gap financing have not been processed as outlined in the objective. Three applications have been submitted. The program did not attract many applicants.	<input type="checkbox"/> Status of project activities written up within memos	<input type="checkbox"/> Oakland residents will eventually inhabit renovated or constructed housing that is affordable.	<input type="checkbox"/> This year 17 of the proposed 30 units of housing on formerly vacant or blighted lots were improved.
Continue existing Receivership program with the goal of 30 properties improved	<input type="checkbox"/> Receivership objective was partially met. By June 5, 2003 there were 17 units in five structures under construction and four additional units being rehabilitated after court proceeding. <input type="checkbox"/> A partnership formed in 1999 with a private developer will yield 21 housing units.	<input type="checkbox"/> Data not organized by project objective	<input type="checkbox"/> There are 17 units of affordable housing under construction in what were vacant or blighted lots.	<input type="checkbox"/> The units delivered this year by private developer in coordination with this project, increased the community's affordable housing stock.
Approve the establishment of Community Land Trust, with developers placing 25 – 30 units under construction	<input type="checkbox"/> Land Trust has been established, but took more time than expected and no construction on property has begun as of June 5, 2003.	<input type="checkbox"/> Data delivered in June, months after due date for evaluation, making it impossible to follow-up with site visits or interview developers	<input type="checkbox"/> There were an additional 21 housing units (16 "affordable" housing units) delivered through a partnership between CEDA and a private developer.	

Evaluator's Recommendations:

- Reassess the viability of both gap financing and private sector rehabilitation programs as the incentives do not appear sufficient to achieve the objectives.
- Determine why cases referred to City Attorney for receivership court action are awaiting filings 8 – 13 months later.
- Consider blending affordable and market rate housing in setting housing development objectives.
- Provide evaluators requested data during the evaluation period.
- Provide status report to evaluators organized by objective.
- Maintain and provide reports of every property successfully returned to the community.

East Bay Central American Refugee Committee

East Bay Central American Refugee Committee	Youth & Family Enrichment Program	\$34,000	Fruitvale/San Antonio Districts
Agency	Project	2002-03 Funding	

Project Description: Provide youth/family resources, emergency food, and employment development assistance for Latino immigrants and other community members in need.

Evaluation Findings

Objectives	Services -- Partial	Data -- Available to evaluate progress on goals and objectives	Client Benefit -- Likely, short term benefits established	Community Benefit -- Likely, short-term benefits established
Provide enriching activities for children/youth & families	<input type="checkbox"/> Weekly meetings for 40-60 youth held including; Soccer, academic tutoring, art classes, ESL (English as a Second Language)	<input type="checkbox"/> No school records were available at this time to document improved graduation rates or academic performance.	<input type="checkbox"/> Parent feedback indicates CRECE services decrease children's risk-taking behavior. Other possible benefits include leadership skills, improved academic performance.	<input type="checkbox"/> Nutritional stability provided by the food distribution program and free health care screenings may possibly result in a less demand for emergency medical and other social services.
Increase access to vital information/resources (i.e. health, education, housing, employment, immigration, ESL)	<input type="checkbox"/> Health care presentations made	<input type="checkbox"/> List of participants, youth/parent interviews, program flyers, photos, sign-in sheets. <input type="checkbox"/> 100% of youth/parents report services met their needs.	<input type="checkbox"/> Families with very low-income with access to food distribution programs will have more available resources to pay their rent. They are therefore, less likely to become homeless.	<input type="checkbox"/> Staff reports that "There's a lot of networking and people getting to know other families, community building, and the community is proud that they take care of themselves."
Increase food stability of clients	<input type="checkbox"/> Emergency Food distributed to 140 families each week	<input type="checkbox"/> Food distribution statistics, focus group results, client satisfaction survey results, USDA monthly summary reports.	<input type="checkbox"/> 100% of clients report increased food stability. <input type="checkbox"/> 100% of participants report they (& their families) benefit from services	<input type="checkbox"/> Possible increased employment or long-term educational/social outcomes
Increase employment opportunities for clients	<input type="checkbox"/> The sewing project was delayed due to limited space at current location. A sewing teacher was hired in April 2003. 15 clients enrolled in the class.	<input type="checkbox"/> Employment placement summary, results of interviews conducted with workers/employers, copies of ads placed in the East Bay Express, sewing class sign-ins.	<input type="checkbox"/> Short-term work provided income for 15 workers. No data available to determine long-range outcomes.	

Evaluator's Recommendations:

- Collect feedback and outcome data (especially educational & employment outcomes).
- Continue to explore ways to diversify and increase funding.
- Should additional funding be secured services could be expanded (i.e. additional field trips, arts/cultural programs, community social events, and more days of academic tutoring.)
- Explore with the young people, how to better meet their needs for transportation and what new project activities could be added which would be responsive to youth's self-stated needs (i.e. sex education, current events, substance abuse prevention, gangs, learning how to get into college and learn about specific college opportunities. With better outreach the project could expand academic tutoring to other youth who need help.
- Continue its efforts to recruit tutors from local colleges.
- Continue to work with its participant's schools and teachers to document academic improvement.
- Consider providing additional job training (i.e. gardening, childcare, house cleaning), more jobs, higher paying jobs, someone in the office, full-time and more advertisements in local papers promoting the availability of workers.
- Consider recruiting a bilingual social worker or family counselor available at the weekly food distributions.

East Bay Community Law Center/Housing Advocacy Project

East Bay Community Law Center Agency	Housing Advocacy Project Project	\$99,750 2002-03 Funding	
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Project Description: Provide legal advice and assistance to no/low-income people with housing issues.

Evaluation Findings

Objectives	Services - Yes, services met and exceeded projections.	Data - Sufficient to evaluate progress on goals and objectives	Client Benefit - Likely.	Community Benefit - Likely.
Operate the Housing Advocacy Project to provide housing legal services to multiple sites in Oakland.	<input type="checkbox"/> Tenant workshops for 326 clients/year	<input type="checkbox"/> Client satisfaction data from 115 AC partnership clients & 13 CDBG client satisfaction surveys. <input type="checkbox"/> Fliers for monthly workshops <input type="checkbox"/> Police officer training outline.	<input type="checkbox"/> Interviews with a very limited (10%) number of clients suggest a high level of benefit and satisfaction with services.	<input type="checkbox"/> EBCLC proposes to benefit the community by helping clients, at risk of eviction and homelessness to maintain their housing.
Assist low-income residents of Oakland in becoming more healthy, secure, productive and hopeful by helping them remain in safe, affordable and decent housing.	<input type="checkbox"/> Operate Low Income Eviction project at the AC courthouse for 485.	<input type="checkbox"/> Intake forms <input type="checkbox"/> Monthly reports to CEDA <input type="checkbox"/> Articles & press releases <input type="checkbox"/> Client demographic information	<input type="checkbox"/> Information from 26% of clients served at the courthouse reveal satisfaction with services at the time they delivered.	<input type="checkbox"/> Likely, individuals & families with access to the legal system are less likely to be displaced from their homes and require social services that assist the homeless.
Answer incoming calls "in-person."	<input type="checkbox"/> Provide direct legal representation for 73 clients/year.	<input type="checkbox"/> One-on-One interviews with ten clients.	<input type="checkbox"/>	<input type="checkbox"/> Providing equal access to the law for low-income clients. <input type="checkbox"/> Protect rights of those with low-income in danger of homelessness.
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Provide opportunity /experience for law students to understand & serve the needs of those with low incomes.

Evaluator's Recommendations:

EBCLC has historically been able to track service delivery (i.e. the type of services and number of clients it serves) more readily than it has been able to track outcomes. As mentioned above, the agency is currently in the process of developing a new database that will enhance the collection and reporting of outcome data. This effort is strongly encouraged for purposes of evaluation and program design and delivery.

- Continue development of database for tracking and reporting information.
- Collect client satisfaction surveys from all clients served whenever possible and at minimum a 30% sample.
- Ask all clients if they would be willing to agree to speak with evaluators if requested.

ECHO Rental Assistance Program

ECHO Agency	Rental Assistance Program Project	\$60,764 2002-03 Funding	Citywide Districts
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Project Description: The Rental Assistance Program provides rental guarantees and other assistance to renters who are at risk of losing their housing.

Evaluation Findings

Objectives	Services - Delivered services and exceeded most objectives	Data - Data was sufficient to evaluate progress on goals and objectives	Client Benefit - Established	Community Benefit - Likely
Provides counseling, rental deposit guarantees to secure housing or assist with eviction prevention, follow-up after housing placement, credit references and collection	<input type="checkbox"/> Provided pre-screening for 619 tenants with low income, slightly below target on objective <input type="checkbox"/> Placed rental guarantees for 98 households - on target or may exceed objective	<input type="checkbox"/> Screening document reviewed	<input type="checkbox"/> Clients are able to maintain housing for at least several months - six months (as ECHO tracks these outcomes)	<input type="checkbox"/> Rental assistance is associated with long-term housing stability
Provides 98 rental assistance guarantees	<input type="checkbox"/> Provided information and referrals for 435 households - exceeded objective	<input type="checkbox"/> Updated demographic statistics on clients reviewed	<input type="checkbox"/> Survey respondents say the program met their needs and staff was knowledgeable	<input type="checkbox"/> This project is likely preventing homelessness, the human and financial costs of which are very high
	<input type="checkbox"/> Provided support counseling for 274 households, exceeded targeted objective	<input type="checkbox"/> Client satisfaction survey of 15% of clients (30% would be better)		
	<input type="checkbox"/> Provided two public service announcements about program	<input type="checkbox"/> Client interviews with 12 clients by evaluator		

Evaluator's Recommendations:

- Establish a system to collect client satisfaction data from at least 30% clients, on an annual basis.
- Ask clients routinely for permission to be interviewed by independent evaluator.
- Collect outcome data on guarantee recipients six or more months after the approval, to assess the impact of this service on overall client housing stability.

Eden Information & Referral/Housing Outreach & Information Access

Eden Information & Referral	Housing Outreach/Information Access	\$50,000	Citywide
Agency	Project	2002-03 Funding	Districts

Project Description: Maintain and increase access to permanent, subsidized transitional and temporary housing for low-moderate income in order to maintain stability, mental health and physical health of individuals & families.

Evaluation Findings

Objectives	Services - Delivered as proposed, on track for completion	Data - Adequate to evaluate progress on goals and objectives	Client Benefit - Likely	Community Benefit - Likely
Assist low-income individuals and families to find and retain stable housing that will contribute to their self-sufficiency and improved quality of life.	<input type="checkbox"/> Increased the number of HUD eligible Oakland residents contacting the agency for information and referrals regarding stable & affordable housing by 250.	<input type="checkbox"/> Database - client intake samples for clients in search of housing <input type="checkbox"/> Database housing information (Intake information about landlords with available units)	<input type="checkbox"/> It is currently undocumented whether the information provided by EDEN I & R led clients to housing, temporarily or long-term. <input type="checkbox"/> 98% of those in search of housing report they received the help they needed & information was better than that they received elsewhere	<input type="checkbox"/> It is likely the community benefits when homeless and/or near homeless families and individuals are better able to locate affordable housing & are potentially stably housed.
Conduct outreach activities to identify property owners in order to increase the pool of affordable housing.	<input type="checkbox"/> EDEN has exceeded the number of available units it proposed to add to its database by 250%.	<input type="checkbox"/> December 2002 monthly monitoring report	<input type="checkbox"/> At risk, homeless, or near-homeless clients (often with domestic violence victims and/or have health problems such as HIV) are assisted in their search for temporary and/or long-term housing.	<input type="checkbox"/> Community based organizations have access to the housing data for the clients they serve.
	<input type="checkbox"/> Identified and educated property owners to increase the pool of affordable/available housing. <input type="checkbox"/> Added 450 new housing units to housing database. <input type="checkbox"/> Conducted outreach activities to identify property owners in order to increase the pool of affordable housing.	<input type="checkbox"/> Referral statistics from FY July 2001-June 2002 for the housing I & R service: CHAIN, Cal WORKS & Work Solutions phone lines <input type="checkbox"/> Documentation (materials & presentations) regarding outreach activities to landlords	<input type="checkbox"/> Other benefits may include referral to necessary social services (i.e. legal assistance, medical & psychiatric support services).	<input type="checkbox"/> Landlords are also educated about the need for lower move-in costs and subsidized housing programs and other barriers low-income renters face.
	<input type="checkbox"/> Answer main phone number (510) 537-2710 in person during regular business hours.	<input type="checkbox"/> Documentation regarding service delivery was more than adequate, however, follow up information on the status of clients' housing status was not sufficient to know the actual outcome these services have on the community.	<input type="checkbox"/> 82% of landlords listing properties rated the service as very satisfactory.	

Evaluator's Recommendations: Given that homeless and near homeless people are indeed a very challenging group to track for follow-up we recommend that this agency think creatively about collection of outcome data for the its clients. One Information and Referral agency has its clients "register" for the receipt of counseling and information, and that entails a commitment to update contact information. Incentives, such as a raffle with a prize of for grocery vouchers, movie passes, etc. could be arranged for clients who return a more detailed status and satisfaction survey that includes information on the three, six month and twelve - month status of clients and their families.

- The agency should modify its goals and objectives to include follow-up with clients to determine outcomes of their housing search.
- Continue to set and implement high standards for "quality control" over the referrals they make.
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With additional funding Eden should make efforts to:

- Administer an overall survey of landlords listing with EDEN I & R to ask if they have tenants who came to them through EDEN I & R.

Family Violence Law Center

Family Violence Law Center Agency	Domestic Violence Prevention Project Project	\$59,911 2002-03 Funding	West Oakland North Oakland Districts
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Project Description: Provide legal and emotional support services to women and children who are the victims of domestic violence.

Objectives	Services - All services delivered as proposed	Data - Sufficient to evaluate progress on goals and objectives	Client Benefit - Short-term client benefits established	Community Benefit - Likely.
Reduce incidence of repeat domestic violence for 90% of clients	<input type="checkbox"/> Provided legal clinics	<input type="checkbox"/> Weekly clinic summary <input type="checkbox"/> Intake forms <input type="checkbox"/> Schedule of appointments <input type="checkbox"/> Database tracking <input type="checkbox"/> Observation of service delivery <input type="checkbox"/> Client satisfaction information from 50% of clients	<input type="checkbox"/> 94% of clients do not experience repeat violence by abuser.	<input type="checkbox"/> Likely services such as these result in decreased crime, homelessness, unemployment and less the need for expensive publicly funded emergency medical and police interventions.
Provide counseling, legal information and referrals. Assist clients to pursue legal remedies	<input type="checkbox"/> Provided direct legal representation		<input type="checkbox"/> 100% satisfaction with staff & services	<input type="checkbox"/> Women with low-incomes gain equal access to the legal system.
Provide advocacy for clients with law enforcement agencies and family court	<input type="checkbox"/> Provided referrals to other necessary social services to 200 clients	<input type="checkbox"/> Referral list	<input type="checkbox"/> Clients with low-income benefit from legal services they might not be able to afford otherwise.	
Provide services for a total 200 clients	<input type="checkbox"/> Provided counseling & support groups for clients	<input type="checkbox"/> Summary of support group attendance <input type="checkbox"/> Sign-in sheets <input type="checkbox"/> Database summary	<input type="checkbox"/> Community counseling and referral may help to break cycle of domestic violence & contribute to reduced homelessness for victims and their children.	

Evaluator's Recommendations:

- Continue to evaluate and implement client feedback (i.e. moving to a more convenient location near public transportation lines).
- Continue to follow-up on clients via telephone and mail every six months to determine their status regarding domestic violence and need for ongoing services and share this information with CDBG evaluators. The agency's six-month follow-up is a valuable tool that could be used to *more consistently* collect evaluation data. Clients could be offered the opportunity to sign a release form consenting to speak with evaluators at the time of this check in as well.

First Place Fund for Youth

Eastlake/San
Antonio, Central
East Oakland,
Central Oakland,
North Oakland
Districts

First Place Fund for Youth
Agency

Emancipation Training Center
Project

\$73,725
2002-03 Funding

Project Description: Provides specialized support services for foster care youth, including: emancipation planning, housing assistance, life skills workshops, financial assistance, case management and counseling.

Evaluation Findings

Objectives	Services – Services delivered as proposed	Data – Sufficient data to evaluate progress on goals and objectives	Client Benefit – Yes, short-term client benefits established.	Community Benefit – Established
Reduce homelessness & housing instability among former foster youth	<input type="checkbox"/> Provided housing resources & search assistance	<input type="checkbox"/> Database reports and feedback survey for supported housing program participants	<input type="checkbox"/> Clients believe the services provided by this project result in a smoother and more successful transition from foster care to independence.	<input type="checkbox"/> Clients are more likely to find/maintain stable housing (i.e. reduced homelessness) than foster youth without access to these services.
Increase rate of high school graduation or GED completion among youth exiting the foster care system	<input type="checkbox"/> Emancipation Specialist services delivered to 25 youth <input type="checkbox"/> Emergency utility assistance delivered to 24 youth	<input type="checkbox"/> Client case management files summary from the database, including goals & notes for each client. Client names were removed to protect confidentiality	<input type="checkbox"/> Increased in housing stability – tracked upon client's exit from project	<input type="checkbox"/> Improved educational and employment for participants (i.e. increased financial independence and employment stability).
	<input type="checkbox"/> Transportation service delivered to 48 youth <input type="checkbox"/> Food assistance delivered to 30 youth	<input type="checkbox"/> Copies of utility bill assistance, utility assistance & food assistance request forms <input type="checkbox"/> Database report	<input type="checkbox"/> Improved academic achievement and educational outcomes – tracked upon client's exit from project	<input type="checkbox"/> Possible reduction in domestic violence and other criminal activities amongst participants.
	<input type="checkbox"/> Recreational activities & community center resources and referrals	<input type="checkbox"/> Sign-in sheets <input type="checkbox"/> Intake and service request forms	<input type="checkbox"/> Clients report "stabilization" of their lives, improved decision-making skills and feeling a "sense of community" and belonging.	

Evaluator's Recommendations:

- Continue use of database that tracks both programmatic inputs and youth outcomes.
- Continue use of former clients as volunteers to help with screening process for new clients.
- Explore new ways to encourage maximum client participation in both voluntary and mandatory activities.

Girls' Inc.

Girls, Inc. Agency	GIRLStart Project	\$48,500 2002-03 Funding	Central East Oakland Districts
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Project Description: GIRLStart is a daily, after-school and summer literacy intervention program for "at-risk" first and second graders, at Lockwood Elementary School in East Oakland.

Evaluation Findings

Objectives	Services - Service delivery exceeded projections	Data - Adequate to evaluate progress toward goals and objectives	Client Benefit - Short-term benefits established	Community Benefit - Likely.
Increase academic achievement and self-esteem for 10 "at risk" first & second grade girls	<input type="checkbox"/> Provided after-school literacy/educational enrichment program at Lockwood Elementary School. (i.e. homework assistance, special art/literacy projects)	<input type="checkbox"/> Student/Parent/Teacher survey & interviews for 40% of participants	<input type="checkbox"/> GIRLStart improved reading/academic ability, and increase girl's confidence and self-esteem.	<input type="checkbox"/> It is likely the community benefits when teachers are supported in their classroom and when schools with low performance levels are provided with free academic support for students at-risk.
Improve reading skills for 95% of participants based on Lockwood's reading level benchmarks		<input type="checkbox"/> Assessments and evaluation of student performance from participant's classroom teachers (using "Open Court" scoring) to establish a benchmark for each individual for participants	<input type="checkbox"/> Though less quantifiable, a positive impact on participants' attitude towards school and learning is also indicated.	<input type="checkbox"/> GIRLStart provides a safe place for participants to be after school and during the summer, while their parents are working.
Clients will have a more positive attitude towards school and learning			<input type="checkbox"/> GIRLStart activities are grounded in youth development principals known to be conducive to positive peer relationships, the development of community, heightened abilities of the youth to take positive risks, the formation of friendships and positive conflict resolution.	<input type="checkbox"/> GIRLStart provides an enriching environment for children from families with low income that might not be able to afford such activities for their children.

Evaluator's Recommendations:

- Collect standardized test data from OUSD and Lockwood School necessary to document the impact of its reading literacy intervention.
- Continue to collect feedback from parents and teachers.
- Make every effort to hire bi-lingual group leaders to assist participants who receive their education in Spanish.
- Continue staff training and development (i.e. intensive training on literacy skill instruction, behavior management, youth development, best practices and other relevant topics).
- Continue to collect academic data on student performance from classroom teachers.

Grandparents & Relatives as Second Parents

Grandparents & Relatives as 2nd Parents Agency: Getting a Grip Project Central East Oakland, Elmhurst Districts

\$74,118 2002-03 Funding

Project Description: Provides peer support and services for grandparents and other "skipped generation" relative caregivers.

Objectives	Services - Services delivered as proposed	Data - Sufficient to evaluate progress on goals and objectives	Client Benefit - Short Term benefits established	Community Benefit - Likely
<p>Provide support services that empower 22 grandparents and relative caregivers with the tools to cope with the challenges and stress of parenting traumatized children or young relatives</p> <p>85% of support group members will attend 75% of group meetings.</p>	<p><input type="checkbox"/> Provided support group meetings, health education workshops, parenting education workshops, crisis and peer counseling</p>	<p><input type="checkbox"/> Sign-in sheets</p> <p><input type="checkbox"/> Workshop evaluation form</p> <p><input type="checkbox"/> Support Group Schedule</p> <p><input type="checkbox"/> Upcoming events memo to participants</p> <p><input type="checkbox"/> Buddy System By-Laws memo to participants</p>	<p><input type="checkbox"/> Clients report learning tools to better cope and receiving help unavailable elsewhere.</p> <p><input type="checkbox"/> Clients report the project contributes greatly to their ability to successfully parent their grandchildren.</p>	<p><input type="checkbox"/> National statistics suggest this form of kinship care is becoming commonplace & nearly 2.4 million (or more) grandparents in the United States are raising their children's children.</p>
<p>85% of support group members will receive four hours of health education</p> <p>85% of support group members will receive four hours of parenting education.</p> <p>85% of clients will rate supportive services as very helpful.</p>	<p><input type="checkbox"/> Provided information and referral services to 178 callers through telephone Warmline</p> <p><input type="checkbox"/> Provided overnight respite activity & social activities</p>	<p><input type="checkbox"/> Annual Support Group Survey, Annual Survey of Problems Facing Support Group Members, WarmLine and Office Intake Form</p> <p><input type="checkbox"/> Grant Results Report for Peer Support Program for Custodial Grandparents of At-Risk-Children (from the Robert Wood Johnson Foundation Website)</p>	<p><input type="checkbox"/> 96% of clients stated that GRP helped them to better understand their grandchild's behavior.</p> <p><input type="checkbox"/> 83% of clients report reduced levels of stress.</p> <p><input type="checkbox"/> 88% of clients report GRP workshops help them take better care of themselves.</p>	<p><input type="checkbox"/> May promote more stable and healthy families.</p> <p><input type="checkbox"/> May reduce need for some social services for grandparents & the children they are raising.</p>
<p>85% of clients will rate supportive services as very helpful.</p>	<p><input type="checkbox"/> Focus group conducted by evaluator</p>	<p><input type="checkbox"/> 100% of clients were satisfied with the overall services they received.</p>	<p><input type="checkbox"/> Children with stable family environment likely experience better educational outcomes.</p>	
<p>Evaluator's Recommendations:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Continue to focus resources on its plan to develop a more diverse funding base <input type="checkbox"/> Collect data that will document the long-term impact of services (i.e. how long do children successfully remain with their grandparents?) What are the educational and personal outcomes for children raised by their grandparents?) <input type="checkbox"/> Continue to survey the grandparents needs for referrals to outside counseling and respite <input type="checkbox"/> Provide additional activities for older children <input type="checkbox"/> Continue to be responsive to clients and explore ways to create a support group environment that meets the needs of all. 				

Housing Rights, Inc.

Housing Rights, Inc. Agency Comprehensive Fair Housing Services Project \$60,000 Citywide
 2002-03 Funding Districts

Project Description: Housing Rights, Inc. provides housing counseling and investigates housing discrimination complaints from people with disabilities and families with children. The agency also educates Oakland residents about fair housing rights and responsibilities.

Evaluation Findings

Objectives	Services - Delivered as proposed	Data - Partially available to evaluate progress	Client Benefit -- Unknown	Community Benefit - Likely
Provide counseling and investigate discrimination complaints for people with disabilities and families with children.	<input type="checkbox"/> Provided housing counseling to 260 people	<input type="checkbox"/> Detailed case files are maintained but were not made available for evaluator to review for verification	<input type="checkbox"/> There was too little information to determine client benefit. Of the nine people interviewed by the evaluator, positive feedback was given about the services received.	<input type="checkbox"/> Education about enforcement of fair housing laws benefits the broader community
Provide community education on fair housing rights and responsibilities	<input type="checkbox"/> Investigated 21 fair housing cases, exceeding objective	<input type="checkbox"/> Client satisfaction data was sparse - only three clients filled out questionnaires	<input type="checkbox"/> One client reports HRI helped him find a lawyer; another reported HRI helped obtain moving expenses from his landlord. One client asked HRI for help obtaining a Section 8 Certificate, but there were none; another testified to the benefits of the education on rent laws.	<input type="checkbox"/> As landlords and tenant become knowledgeable about their rights and responsibilities, disputes are less likely to occur or erupt into legal action
	<input type="checkbox"/> Provided education and outreach as proposed	<input type="checkbox"/> Evaluator contacted 9 people who gave positive feedback on the services they received, but this constitutes 4% of the clients counseled.		
	<input type="checkbox"/> Conducted targeted outreach to schools as proposed			

Evaluator's Recommendations:

- Survey a minimum of 30% of clients (those receiving counseling and complaint investigation) for their satisfaction with the services.
- Review response system to telephone calls, and set standards for returning calls and e-mails, measure performance.
- Set goals and standards for documenting the knowledge to be gained in workshops or counseling sessions and measure it systematically.
- Obtain client permission routinely to talk to independent evaluator
- Set standards for rigor of investigation to gather evidence in fair housing complaints and perform internal monitoring to see that they are followed.

International Institute of the East Bay

International Institute of the East Bay Agency: Caregivers Job Training & Placement Project West Oakland Districts
 Funding: \$32,000 2002-03

Project Description: Provide English language classes and childcare career development/job placement and for immigrant and refugee women.

Evaluation Findings

Objectives	Services – Services delivered as proposed	Data - Adequate to evaluate progress on goals and objectives	Client Benefit - Likely	Community Benefit – Likely
Provide job training/employment services & career development workshops (career & personal development for 16 low-income immigrant and refugee women.	<input type="checkbox"/> Provided 20 hours/week of vocational training (i.e. childcare, English language classes & professional development workshops)	<input type="checkbox"/> Client intake/case files <input type="checkbox"/> Job placement records for past two years <input type="checkbox"/> Attendance records	<input type="checkbox"/> Clients unanimously report increased childcare skills, learned new culture, find employment and improved English.	<input type="checkbox"/> IIEB services may reduce the number of immigrants needing public assistance.
Improve clients' ability to function in a new culture, increase clients' English language skills & help clients improve their self-esteem.	<input type="checkbox"/> Provided job placements- Graduation had not yet occurred; therefore no job placement information was available at the time of this evaluation	<input type="checkbox"/> English assessment test results	<input type="checkbox"/> Other benefits are likely but not possible to quantify at this time (i.e. vocational training leading to increased employability and wage earning potential; emotional support from peers and teachers; improved English language skill; improved ability to function in a new culture and increased self-esteem).	<input type="checkbox"/> Project staff reports the community benefits from approximately 2,000 hours of donated labor provided by clients who work as interns at local childcare centers. The quality of childcare at these facilities may increase due to the presence of IIEB interns.
75% of clients will complete the project.		<input type="checkbox"/> Graduation records were unavailable at the time of the evaluation. However project is on track.		<input type="checkbox"/> May increase the number of immigrants who are able to function more comfortably and effectively in their new home.
Provide internship & job referral.		<input type="checkbox"/> Client satisfaction survey/focus group results from 100% of participants <input type="checkbox"/> Internship evaluations <input type="checkbox"/> Quarterly employment service summary <input type="checkbox"/> Job placement information was unavailable at the time of the evaluation		

Evaluator's Recommendations:

- Though many of the participants have limited English language skills they expressed a desire for other types of career training with greater earning potential. Therefore, IIEB should actively explore the possibility of offering these new types of career training that would lead to more profitable careers. (i.e. nursing, cooking/baking, computer skills, janitorial skills, elder care).
- Compile and review internship placement evaluation data in order to clearly understand successful patterns of learning and to better assess how well their students are able to apply knowledge their classroom learning in the workplace.
- Focus on securing new sources of funding training to accommodate additional clients and their changing needs in the current job market.
- Continue conducting intake interviews and English language assessments as a baseline for evaluation of client progress, convening focus groups and surveying client satisfaction.

Lao Family Community Development

Lao Family Community Development Agency: Multilingual Homeownership Center Project Districts Two and Five - Citywide Districts

2002-03 Funding: \$100,000

Project Description: The Center is new and provides comprehensive homeownership education and assistance to limited-English-speaking and low-to moderate-income households in Oakland.

Evaluation Findings

Objectives	Services - All delivered beyond contractual obligations	Data - Adequate to evaluate progress on goals and objectives	Client Benefit - Established	Community Benefit - Established
Homeownership for clients (mostly low- and moderate-income Asian immigrants who speak little or no English) is the ultimate objective	<input type="checkbox"/> Outreach activities exceeded projections <input type="checkbox"/> Home buying workshops were conducted and exceeded projected numbers of attendees (over 332 people attended as of March, 2003). <input type="checkbox"/> Counseling on home buying to 112 people (exceeded projection of 50 people) was provided.	<input type="checkbox"/> Confirmation of home purchases by banks. <input type="checkbox"/> Records of workshop attendees.	<input type="checkbox"/> 17 Oakland residents purchased homes in Oakland this year. <input type="checkbox"/> Six homeowners refinanced their homes.	<input type="checkbox"/> Housing and neighborhood stability through increased homeownership
Loan pre-approvals occurred for 31 people as of March 2003, exceeding projection of 20.	<input type="checkbox"/> Loan pre-approvals occurred for 31 people as of March 2003, exceeding projection of 20.	<input type="checkbox"/> Number of outreach brochures distributes.	<input type="checkbox"/> Six homeowners received help to avoid "predatory lending practices."	
Follow-up with client to the home purchase stage was done with 14 clients (exceeding projection of 8 clients).	<input type="checkbox"/> Follow-up with client to the home purchase stage was done with 14 clients (exceeding projection of 8 clients).		<input type="checkbox"/> Client satisfaction surveyed with large sample of clients, results of which were universally positive.	

Evaluator's Recommendations:

- Continue aggressive marketing, and consider a wider variety of outreach strategies.
- Review and revise method of collecting client satisfaction data, to be less "mediated" by the project staff.

Life Enrichment Agency

Life Enrichment Agency/Oakland Department of Parks & Recreation
 Agency _____ Technology Literacy Program _____ \$17,000 _____ West Oakland Districts
 Project _____ 2002-03 Funding _____
 Project Description: Provide elementary and middle school students with access to computers and computer literacy tutoring/instruction at two Oakland Recreation Centers.

Evaluation Findings

Objectives	Services - Partial, Delivered at 50% of sites.	Data - Partial. Data available for 50% of sites.	Client Benefit - Likely	Community Benefit - Likely.
Provide computer literacy tutoring and instruction to ten people each at two Oakland Department of Parks and Recreation Center sites.	<input type="checkbox"/> Served an average of 10 students per month at Poplar Recreation Center	<input type="checkbox"/> Sign-in sheets, client feedback & client interviews from Poplar Recreation Center.	<input type="checkbox"/> 50% of clients report they benefited from services, which met their needs and improved computer skills.	<input type="checkbox"/> Provides a safe, educational and wholesome after-school environment for its clients.
Install a computer lab at DeFremery Recreation Center	<input type="checkbox"/> Served an average of 5 students per month at DeFremery Recreation Center	<input type="checkbox"/> No data available from DeFremery Recreation Center at the time of this evaluation. Service delivery was delayed.	<input type="checkbox"/> 50% of clients report staff is knowledgeable, respectful and that they would recommend the project to others.	<input type="checkbox"/> Other community benefits are possible to achieve but difficult to quantify. They include a reduction in violence, crime, delinquency, gang involvement, littering and drug use.
	<input type="checkbox"/> Computer lab installation delayed due to need for infrastructure upgrade	<input type="checkbox"/> No data is currently available to assess whether this new project achieves its goals (i.e. academic enrichment, skill building, and improved self-esteem).		
		<input type="checkbox"/> Questionnaires & interviews with clients, parents & staff.		

Evaluator's Recommendations:

- Work with schools and churches to increase the community's awareness of this project and increase enrollment (at minimum) to projected levels.
- Determine potential infrastructure problems (i.e. expensive electrical re-wiring of older buildings) prior to the allocation of resources to that site.
- Revise goals and objectives to suit each site's unique characteristics. If the project is to function a "drop-in" service with individualized tutoring, the proposal should accurately reflect that.
- Survey client satisfaction of all project participants, their parents and teachers throughout the project year.
- Track academic performance, which will require closer collaboration between project staff and teachers. Perhaps telephone interviews or informational meetings could be conducted to help gauge the impact of the project on the participant's academic performance.
- Administer pre and post/tests to measure acquisition of skills. These tests should be administered at the beginning and end of each session.

Oakland Business Development Corporation -- Small Business Lending

Oakland Business Development Corporation (OBDC) Agency _____ Small Business Lending Project _____ \$315,000 2002-03 Funding _____ Citywide Districts _____

Project Description: OBDC administers three loan programs designed for companies that lack access to the traditional capital markets, with an overall goal of stimulating commercial development in Oakland.

Evaluation Findings			
Objectives	Services - Likely to be delivered or exceeded	Data - Sufficient to evaluate this project	Client Benefit - Established
Administer the NEDF loan program for short-term loans up to \$25,000 and long-term loans up to \$60,000	<input type="checkbox"/> 83% of NEDF loans processed - several more likely by June 30, 2003 <input type="checkbox"/> 70% of Micro Loans processed but objective could be met.	<input type="checkbox"/> Evaluator interviews with 12 clients. <input type="checkbox"/> Client satisfaction survey of 10% of clients.	<input type="checkbox"/> Counseling results in good loan applications. <input type="checkbox"/> Clients surveyed agreed that OBDC met their needs, was courteous, prompt, improved their business skills. <input type="checkbox"/> Businesses have survived and remained competitive as a result of OBDC. <input type="checkbox"/> Jobs have been created in businesses.
Administer Micro Loan program for short and long-term loans up to \$10,000	<input type="checkbox"/> EEC loan objective, loan servicing on city loans, and provision of workshops likely not to be met due to late authorization by City.	<input type="checkbox"/> Case files for all loans reviewed by evaluator.	<input type="checkbox"/> Eight low-income jobs have been created.
Assume responsibility for EEC Loan program	<input type="checkbox"/> Marketing commercial loans to businesses exceeded objectives. <input type="checkbox"/> Exceeded objective to package and fund SBA loans. (28)	<input type="checkbox"/> Records of marketing and community presentations kept and reviewed by evaluator. <input type="checkbox"/> Hours of counseling and technical assistance records reviewed.	<input type="checkbox"/> The technical assistance provided by OBDC has resulted in responsible business planning and entrepreneurship.
Evaluator's Recommendations: <ul style="list-style-type: none"> <input type="checkbox"/> Continue marketing for the EEC and perform analysis of industries and businesses offer greatest potential for business growth. <input type="checkbox"/> Consider raising the number of loans and lowering the amount for loans in the SBA program. <input type="checkbox"/> Continue aggressive marketing to raise the number of quality loan applications received. <input type="checkbox"/> Increase the response rate to client satisfaction survey to 30% of clients. <input type="checkbox"/> Update and verify job creation data. 			

Oakland Small Business Growth Center

Oakland Small Business Growth Center Small Business Incubator \$225,000 Citywide

Agency Project 2002-03 Funding Districts

Project Description: This Center provides assistance to small businesses, including low-cost office space, entrepreneurial training, and other forms of technical assistance.

Evaluation Findings

Objectives	Services - Delivered as proposed	Data - Adequate to evaluate progress toward service delivery objectives	Client Benefit - Likely	Community Benefit - Short term benefit established
Enable small and growing businesses to become self-sustaining within two or three years.	<input type="checkbox"/> Provided office space for 17 businesses and seven "executive partners" <input type="checkbox"/> Provided monthly seminars on business practices <input type="checkbox"/> Provided 87 hours of management and technical assistance to partners	<input type="checkbox"/> Monthly progress reports documented seminar activities, technical assistance, marketing and advertising <input type="checkbox"/> Report of occupancy status on numbers and types of businesses at center <input type="checkbox"/> Interviews by evaluator of participants in seminars <input type="checkbox"/> Records of additional grant solicitations, resolution of rent arrearage paid by the City	<input type="checkbox"/> Business owners interviewed report benefitting from OSBGC. <input type="checkbox"/> Two of the businesses 'graduated' from the Center to a larger space and are likely to continue to increase both revenue and employment over time.	<input type="checkbox"/> OSBDC fosters small business growth in Oakland with its concomitant economic and tax generation and increased employment. <input type="checkbox"/> The Center's partners currently employ 137 people, an estimated 80% of whom are low income. <input type="checkbox"/> The Center's partners currently generate \$22.6 million in revenue.

Evaluator's Recommendations:

- Consider expanding seminars to include areas where businesses are typically weak (e.g., strategic planning, managing inventory and growth, budgeting and financing).
- Quantify the Center's goals and objectives.
- Survey client satisfaction and develop an evaluation plan to include interviews with client, past and present.
- Develop a method to document longer term status of businesses, to determine if they have become self-sustaining within two or three years as proposed by the Center.

Phase III Substance Abuse and Recovery Program

Phase III Agency: Substance Abuse & Recovery Program \$60,000 2002-03 Funding West Oakland Districts

Project Description: Provide residential, faith-based, substance abuse rehabilitation services in West Oakland.

Evaluation Findings

Objectives	Services - Services exceeded objectives	Data - Sufficient to evaluate progress on goals and objectives	Client Benefit - Short-term benefits established.	Community Benefit - Likely
Assist 25 substance abusers and former substance abusers to overcome their abuse and reintegrate into the community.	<input type="checkbox"/> Provided residential treatment and support services for 25 clients.	<input type="checkbox"/> Case files for 60 clients <input type="checkbox"/> Class sign-in sheets <input type="checkbox"/> Referral forms <input type="checkbox"/> Client evaluation forms	<input type="checkbox"/> Clients remain clean & sober while residing in a supportive environment.	<input type="checkbox"/> Long-term benefits to the community depend on the clients' ability to maintain sobriety and live productive lives after leaving Phase III.
80% of clients will rate services as effective or very effective.		<input type="checkbox"/> Client interviews, opinion/feedback questionnaires	<input type="checkbox"/> 100% of clients report benefits (i.e. community, camaraderie, support, role models, empowerment activities and a "sense of hope")	<input type="checkbox"/> May help to reduce drug addiction, crime and homelessness in West Oakland.
60% of the clients will graduate from the program and be working or full time students.		<input type="checkbox"/> Graduation Programs & Certificates certifying satisfactory completion of the Phase III were not yet available at the time of this evaluation.	<input type="checkbox"/> Staff reports that, after one year with Phase III, all clients have a three month exit plan and are either working or in school full-time.	<input type="checkbox"/> Provide a "referral hub" for community members in need of substance abuse information and services.
40% of clients will remain clean and sober for six months after completion of program.		<input type="checkbox"/> No substance abuse relapse rates or information documenting employment is available for current or past clients at this time.		<input type="checkbox"/> Clients are encouraged to "give back" to the community as part of their recovery.

Evaluator's Recommendations:

- Collect and document outcomes for clients who have graduated from the program.
- Schedule phone interview at 6 and 12 months to see if former clients are still employed and/or in school and free from substance abuse. This would confirm a reduction in drug addiction and other long-term benefits for clients (i.e. better employment outcomes, improved family relationships, housing stability).
- With substantial additional funding Phase III could add staff (i.e., licensed in-house medical diagnostic and referral staff) for clients' immediate medical/psychological needs.
- Explore client suggestions for program expansion including: additional sports, physical exercise programs, additional N.A. and A.A. meetings; more meetings at the residential facility, more meetings and more staff/counselors for the women, more job development services, more field trips and recreational/social activities, more reading/academic tutoring, more fresh food included in meals.

Rebuilding Together

Rebuilding Together Agency: Rebuilding Together/Christmas In April Project \$50,000 Citywide Districts
 2002-03 Funding

Project Description: Use volunteer resources to repair and renovate low-income, elderly/senior owner occupied homes and other nonprofit facilities in Oakland.

Evaluation Findings

Objectives	Services -Service delivery was on target.	Data- Adequate to evaluate progress on goals and objectives.	Client Benefit - Likely	Community Benefit - Likely
Improve the safety, property retention & ability to remain in homes for low-income senior and disabled Oakland homeowners	<input type="checkbox"/> Solicited sponsors, recruited volunteers, processed applications to homeowners and referral sources	<input type="checkbox"/> Database report/assignment of resources documenting the total number clients impacted by the rehabilitation of the community agency sites <input type="checkbox"/> List of 2002/03 sponsors <input type="checkbox"/> List of 2002/03 volunteers <input type="checkbox"/> Documentation of volunteer trainings- including date, number of volunteers and location <input type="checkbox"/> Schedule of weekend work in April	<input type="checkbox"/> Likely clients' homes will be safer & injuries will be prevented.	<input type="checkbox"/> Likely will improve the appearance of neighborhoods & reduce blight.
Improve the appearance of neighborhoods and reduce blight	<input type="checkbox"/> Reviewed applications, homes, informed homeowners of their status, trained house captains	<input type="checkbox"/> Before and after photos from previous years <input type="checkbox"/> Rehabilitation data was not yet available for 2002-2003 due, as final workday had not yet occurred at the time of the evaluation.	<input type="checkbox"/> Likely clients will be able to retain their property.	
Provide rehabilitation work for 20 individual households and 3 community-based organizations	<input type="checkbox"/> Scheduled workdays for rehabilitation work for April	<input type="checkbox"/> No data is yet available to document clients' homes will be safer, injuries will be prevented & clients will be able to retain their property. However, anecdotal comments from last year's clients suggest safety is increased.	<input type="checkbox"/> Based on the fact that the service delivery is on track, and based on previous year's outcome data, there is every reason to believe that the clients of the 2002-03 services will benefit from the renovations and rehabilitation of their properties.	
Evaluator's Recommendations:	<input type="checkbox"/> Contact information for last year's clients (16 homeowners & 3 community based organizations).			
<input type="checkbox"/> Document the outcomes of its physical improvement work.	<input type="checkbox"/> Collect data that will document long-term increase in safety/injury prevention and the exact nature of unsafe conditions corrected by the work, property retention and number of clients who are actually able to age "in place" as a direct result of the services they receive. <input type="checkbox"/> Continue to explore new ways to increase and diversify funding by exploring new public, private and foundation support that might allow for program expansion.			

San Antonio Community Development Corporation

San Antonio Community Development Corporation Agency	Small Business Neighborhood Commercial Revitalization Project	San Antonio District District Breakdown
	\$80,000 2002-03 Funding	

Project Description: Strengthen the San Antonio -- Fruitvale area's attractiveness for investment, provide technical assistance to local businesses, and coordinate the community development efforts in this district.

Evaluation Findings

Objectives	Services - Partially achieved and hampered by late contract	Data - Partially available and sufficient to evaluate this project	Client Benefit - Unknown	Community Benefit - Minimal
Provide counseling to new businesses	<input type="checkbox"/> Business assistance activities partially completed. Two businesses received financing and one other won a local procurement contract	<input type="checkbox"/> E-mails from Executive Director describing efforts and tracking implementation on all objectives	<input type="checkbox"/> Businesses interviewed believed that a program like SACDC is an important resource in the community, even if the help it provided to them was small	<input type="checkbox"/> Sidewalk sweeping program began late and was not sustained.
Advance commercial development on three specific properties and serve as an information clearinghouse for the status of vacant or underutilized sites	<input type="checkbox"/> Property development activities were seriously hampered by the delay in receiving contract (8 months). However there are other significant barriers, (i.e., need for seismic retrofit) to development	<input type="checkbox"/> Evaluator conducted telephone interviews with eight clients, reviewed client satisfaction data, observed merchant workshop. However, the number of clients surveyed for satisfaction exceeded the number of clients recorded in the database, so the results are very difficult to interpret.	<input type="checkbox"/> Little progress has been made on property development objectives over the last three years	<input type="checkbox"/> No documentation for property development activities
	<input type="checkbox"/> Conducted 17 of the proposed 20 preliminary assessments of needs for financing and TA by San Antonio area businesses	<input type="checkbox"/> Written MOU on specific property sites remain uncompleted <input type="checkbox"/> List of vacant or underutilized properties does not define why properties are on the list or provide pictures as outlined in the objective	<input type="checkbox"/> Attendees at the Financial Resource Workshop were pleased	<input type="checkbox"/> Tree planting programs appear to be underway and will likely improve the neighborhoods.
	<input type="checkbox"/> Technical assistance workshop on special topics related to small business growth held and attended by 14 businesses	<input type="checkbox"/> Documentation was delivered long after agreed-upon deadlines	<input type="checkbox"/> Client satisfaction survey was not implemented reliably	

Evaluator's Recommendations:

- Property development activities need a sharper focus, and the project should shift resources away from properties that cannot be advanced.
- Both Miller Avenue housing development site and Library require strategies leading to resolution.
- Analyze reasons why the contract was delayed eight months.
- Focus the Technical Assistance program on business development issues.

Sentinel Fair Housing

Sentinel Fair Housing Agency Fair Housing Services Project Citywide Districts
 \$130,000 2002-03 Funding

Project Description: SFH provides comprehensive rental property owner and tenant counseling, mediation, and fair housing counseling and enforcement services in Oakland.

Evaluation Findings

Objectives	Services - Delivered as proposed	Data - Sufficient to evaluate progress on goals and objectives	Client Benefit - Unknown	Community Benefit - Likely
Conduct fair housing education, counseling and investigations in connection with rental, sales, mortgage lending and insurance discrimination complaints.	<input type="checkbox"/> Provided intake, counseling and investigation of 58 complaints (as of March 2003) <input type="checkbox"/> Tested ten cases of alleged discrimination <input type="checkbox"/> Provided 15 language and culturally specific community meetings	<input type="checkbox"/> Monthly reports on education and outreach efforts <input type="checkbox"/> Detailed case files are maintained, but not available for evaluator to review	<input type="checkbox"/> Insufficient data to determine this <input type="checkbox"/> No records of dispute resolution agreements made available, or results of fair housing investigations <input type="checkbox"/> Four client satisfaction questionnaires were collected from the clients receiving core services. This is less than 10% of the clients surveyed, too few draw any conclusions	<input type="checkbox"/> It is likely that both landlords and tenants become more knowledgeable about their rights and responsibilities and that disputes are less likely to occur <input type="checkbox"/> It is likely that habitability issues in rental units are remedied, and deterioration of multifamily housing stock halted
	<input type="checkbox"/> Provided case management and dispute resolution of 291 cases <input type="checkbox"/> Provided 12 fair housing law training sessions and disseminated 1200 pieces of educational material	<input type="checkbox"/> Evaluator interviews with clients <input type="checkbox"/> Client evaluations of three workshops	<input type="checkbox"/> SFH surveyed attendees of workshop 98% of whom rated SFH highly <input type="checkbox"/> Individual clients interviewed believed the program and staff served them well <input type="checkbox"/> G & A independent phone test calls revealed that telephone access to service is poor	<input type="checkbox"/> When a tenant is able to remain in an affordable apartment as a result of SFH services, the community goal for providing and retaining affordable housing is supported

Evaluator's Recommendations:

- Collect more client satisfaction data.
- Review current response system to telephone inquiries to ensure that phone calls are returned.
- Set standards for obtaining dispute resolution agreements in writing, and do compliance checks six months hence to see that these agreements are kept.
- Set goals and standards for documenting knowledge to be gained at workshops.
- Obtain client permission routinely to talk to independent evaluators.
- Set standards for rigor of investigations to gather sufficient evidence in fair housing complaints and perform internal monitoring to see that they are met.

PART I:

NARRATIVE REGARDING ANNUAL PERFORMANCE

Narrative A: Non-Housing Community Development

Resources used for economic development, public services and infrastructure activities included Community Development Block Grant (CDBG), Community Services Block Grant (CSBG), U.S. Department of Agriculture/Head Start, Economic Development Initiatives (EDI), HUD 108 Loan Guarantees, Job Training Partnership Act, State Gas Tax, State Library Grant, Local Tax Revenues and Oakland Redevelopment Agency.

1. Funds Made Available During Program Year

Federal Resources for Non-Housing Community Development Activities

PROGRAM
<p>a. <u>Community Development Block Grant</u></p> <p>The City received \$10,043,000 in Community Development Block Grant funding, plus program income of \$1,987,193. In addition, \$479,250 in unused CDBG funds reallocated from prior grant years were used to augment the funds allocated for public service and economic development. The total funding received from all these sources is \$12,509,443.</p>
<p>b. <u>Community Services Block Grant</u></p> <p><i>The City received \$788,847 in CSBG funds to provide community service programs.</i></p>
<p>c. <u>Head Start</u></p> <p><i>The City's Office of Health and Human Services received \$14,121,285 to provide child care and tutorial programs.</i></p>
<p>d. <u>Department of Agriculture/Healthy Start</u></p> <p><i>The USDA provided \$366,060 to fund lunch programs for children in the Head Start program.</i></p>

State Resources for Non-Housing Community Development Activities

PROGRAM
<p>a. <u>Job Training Partnership Act (JTPA)</u></p> <p>This Federal grant provides Citywide information on job opportunities and job training providers and provides support to Redevelopment Agency projects. The City received approximately \$7,961,776.</p>

Local Resources for Non-Housing Community Development Activities

PROGRAM

a. General Fund

The City's general fund provides job placement services to Oakland residents. Job training agencies including those funded under JTPA and CDBG refer their clients to the "Hire Oakland" program for job placement. The Port of Oakland operates a similar program for its Port tenants.

The employment component of the City's Contracting and Employment Services placed Oakland residents on City construction contracts.

The Port of Oakland's Employment Resources Development Department (ERDP) placed unemployed and underemployed Oakland residents with Port tenants including positions with the International Longshoremen's & Warehousemen's Union.

b. Redevelopment and Private Investment

The City's primary redevelopment area, the Central District, represents a substantial public investment. Funds will be available to implement redevelopment. The investment will leverage additional associated private investments. Several construction projects have been completed or are underway.

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**COMMUNITY & ECONOMIC
DEVELOPMENT CMTE**

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2. Economic Development

Economic development activities are expected to result in jobs for residents of low-and moderate-income areas in Oakland.

Activities

(A) Business Development Program

The Business Development Program is a part of the City of Oakland's Community and Economic Development Agency, Economic Development Division. Business Development staff is responsible for implementing programs that retain and attract businesses and increase employment throughout the City of Oakland's Community Development Districts. Business Development staff accomplishes these goals by serving as the point of entry for prospective and existing businesses seeking capital, workforce, energy efficiency programs, training and technical assistance, business incentives and real estate products (site location assistance, environmental services, etc.) and permit streamlining. Business Development coordinates business retention, expansion and attraction efforts and oversees the development and implementation of Oakland's retail attraction strategy. A contract with the Oakland Commerce Corporation (OCC), a non-profit technical assistance provider, supplements staff resources, specifically with industrial business outreach and job retention. This contract is not funded using CDBG funds.

(B) Neighborhood Commercial Revitalization

The Neighborhood Commercial Revitalization (NCR) Program is a part of the City of Oakland's Community and Economic Development Agency, Economic Development Division. NCR staff is responsible for implementing programs to improve the physical and economic condition of targeted commercial corridors throughout the City of Oakland's Community Development Districts. NCR staff utilizes the framework of the National Trust for Historic Preservation's Main Street Program to develop revitalization strategies for neighborhood commercial districts. The multi-pronged Main Street approach focuses on Organization, Design, Promotion, Economic Restructuring and Cleanliness/Safety. The following activities are implemented by NCR staff based on the Main Street approach:

- Organization- staff works to organize property owners and merchants to address problems that adversely affect the viability of the commercial district and to coordinate the delivery of city services.
- Design- staff implements the Commercial Property Façade Improvement Program that offers architectural design assistance and matching grants to rehabilitate and improve the façade of commercial buildings. Urban design concept plans for pedestrian and streetscape improvements are developed to create business and pedestrian friendly environments along high trafficked corridors.
- Promotion- staff assists merchant associations to plan and implement events to promote shopping in NCR areas. NCR co-sponsors festivals, develops business directories and

supports the City of Oakland's Shop Oakland campaign which promotes shopping in Oakland.

- Economic Restructuring- staff developed and maintains a database of economic conditions in NCR target areas. The database includes land uses, zoning, property ownership, list of businesses, retail sales and property taxes, vacant properties list, ½ and 1 mile demographic information, etc. This information is used to identify locations for perspective new businesses and development projects, business attractions, market analysis and to identify trends.
- Cleanliness and Safety- the relationship between the appearance of an area and public safety is emphasized by staff to merchant and community groups. Working with merchants associations and community organizations NCR staff coordinates cleanup events on commercial corridors. Staff also coordinates with Code Compliance to reduce the number of blighted properties with the Façade Improvement Program. Education and outreach are the principle activities of this initiative.

(C) One Stop Capital Shop (OSCS)

The OSCS is a multi-service center that provides personalized technical and financial assistance to small business owners to attract, retain and expand Oakland's economic base. This is accomplished by providing business skills training, technical support and financing to develop and implement successful business strategies to capture and multiply the benefits of Oakland's expanding local economy. The mission is accomplished through operating an Entrepreneurial Skills Development, Technical Assistance, Business Financing, coordinating Service Delivery with other CEDA business service units, leveraging the City's limited resources by promoting the investment of public and private sector financial institutions, and coordinating service delivery with business service organizations in the private sector. OSCS administers several CDBG and HUD Section 108-funded loan programs and works in cooperation with the U.S. Small Business Administration, private lenders and technical assistance service providers to deliver its services.

(D) Oakland/Berkeley Recycling Market Development Zone (RMDZ)

The Oakland/Berkeley Recycling Market Development Zone (RMDZ) program offers a targeted loan fund and intensive technical and market development assistance to firms that use recycled materials in their production process. The RMDZ encompasses all of the industrial zoned land in Oakland and Berkeley, with Oakland accounting for 90% of the manufacturers in the Zone.

Economic Development Activities and Accomplishments

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Business Development Citywide</p>	<p>Business Development activities; provides management technical, referral, energy efficiency and financial assistance to retain and increase employment and develops and implements Oakland's retail attraction strategy.</p>	<p>Assist 200 businesses to remain in Oakland; retain 1,200 jobs; attract 40 new businesses and create 2,000 jobs.</p>	<p>Assisted 409 businesses to remain in Oakland, retained 4,984 jobs in Oakland, attracted 22 new businesses and created 516 jobs, many of which benefited low and moderate income residents and neighborhoods.</p>
<p>National Development Council Citywide</p>	<p>The National Development Council (NDC) is a national consulting firm that provides technical assistance to eligible neighborhood and small business clients of the Community and Economic Agency. NDC is an integral advisory resource to CEDA's OSCS when considering complex financing structures for HUD-108 finances projects. NDC will be an important advisor to OSCS and NCR when developing financing structures for projects developed under N-Prep.</p>	<p>Assist OSCS staff with approximately 4 projects when considering complex financing structures</p>	<p>NDC has assisted staff as an integral advisory resource with review and development of complex financing structures for approximately 8 or more projects.</p>

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Neighborhood Commercial Revitalization</p> <p>Specific NCR Target Areas</p>	<p>NCR staff works with businesses, property owners, community groups in 15 NCR areas to improve the physical and economic condition of the commercial district. The is accomplished through the collection and analysis of baseline economic data; organizing and assisting merchant associations; implementing the <i>Commercial Property Façade Improvement Program</i>; designing and constructing streetscape improvement projects; assisting with the establishment of Business Improvement Districts (BIDs); developing business directories and other materials to promote shopping and to market NCR areas as locations for new businesses and investors..</p>	<p>Complete 40 façade improvement projects; Provide assistance to 15 neighborhood merchant associations; Assist in the establishment of 1 new BID; Assist in the renewal and reauthorization of the 4 existing BIDs; Monitor the implementation of 6 streetscape improvement projects and Maintain baseline economic data for 15 NCR areas.</p>	<p>Completed 50 façade improvement projects; Provided assistance to 18 merchant associations, provided information to approximately 200 small businesses a quarter; Assisted in the establishment of the Lakeshore/Lakepark BID and the reauthorization of the Montclair and Rockridge BIDs and facilitated the City Council acceptance of the Fruitvale BID annual report; Monitor implementation of five streetscape improvement projects in East Oakland where more than \$18 million of public funds are being invested and Maintained baseline data on 15 NCR areas.,</p>

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Eastlake and Fruitvale Main Street Specific NCR Target Areas	<p>NCR works with the East bay Asian Local Development Corporation (EBALDC) and Spanish Speaking Unity Council (Unity Council) to coordinate revitalization activities in the Eastlake and Fruitvale NCR areas. Eastlake and Fruitvale are designated California Main Street areas. Main Street utilizes a four pronged approach to revitalize older commercial districts including; Organization, Promotion, Design and Economic Restructuring. EBALDC and the Unity Council coordinates with NCR staff to implement the façade improvement program merchant organizing and public improvement projects.</p>	<p><u>Fruitvale Main Street:</u> Coordinate with NCR to complete 8 façade projects; coordinate with NCR to install public art in commercial districts; organize Annual Dia de Los Muertos and Cesar Chavez festivals; update the Fruitvale business directory and provide assistance to merchant associations.</p> <p><u>Eastlake Main Street:</u> Conduct outreach activities to merchants for city sponsored projects; coordinate 8 meetings of the Eastlake Merchants Association during contract term; coordinate meetings of Main Street committees; coordinate with NCR to market façade improvement program and provide translation services as needed; coordinate with City staff and property owners to resolve code compliance issues; organize and implement 1 festival event in the Eastlake district.</p>	<p><u>Fruitvale</u> Completed 7 façade improvement projects, coordinated the painting of a mural on 35th Avenue, installed 8 new mosaic planters and facilitated the completion of designs for decorative street banners; organized Cesar Chavez Day of Service and Learning Festival and 7th Annual Dia de los Muertos Festival and provided organizational development assistance to the Foothill-Fruitvale Merchants Association.</p> <p><u>Eastlake</u> Conducted outreach to merchants for Eastlake Streetscape project and Façade Improvement Program; coordinated meetings of the Main Street committees; coordinated with NCR on the completion of 4 façade improvement projects; facilitated merchant association meetings and provided leadership training; developed a multi-lingual business directory; coordinated with City staff and City Council office to resolve issues associated with problem properties and uses in Eastlake; organized the 2002 Eastlake Unity Festival and assisted in organizing the East Bay Festival.</p>

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Oakland Business Development Corporation 519 17th Street targeting is Citywide</p>	<p>OBDC is a primary referral for OSCS clients requesting loans of less than \$100,000. The funds being requested through their application for contract provides OBDC to continue this type of lending, to provide loan packaging assistance, and to offer one-on-one management and technical assistance in connection with revolving loan funds.</p>	<p>Provide 12 NEDF loans and 6 EEC Section 108 loans. Technical and referral assistance to eligible clients</p>	<p>Approved 2 and funded 1 EEC Section 108 loans. Approved 12 NEDF loans and funded 8 of them. Technical and referral assistance to eligible clients.</p>
<p>Oakland Small Business Growth Center</p>	<p>Development and operation of a small business, attraction and retention program, the Small Business Growth Center</p>	<p>Provide management of the operation of the City's small business incubator project.</p>	<p>The incubator provided technical assistance and business services to micro-enterprise businesses.</p>
<p>One Stop Capital Shop 519 17th Street targeting is Citywide</p>	<p>OSCS provides owners of small businesses and entrepreneurs in Oakland with training, resources and information to assist in the success of their small businesses. The OSCS also provides direct commercial business loans for the purpose of business expansion, attraction and retention with the goal of creating jobs for Oakland residents. Businesses located in one of Oakland's three Enhanced Enterprise Communities (EEC) of West Oakland, East Oakland, and San Antonio/Fruitvale are also eligible to apply for specifically designated low interest business financing programs.</p>	<p>Intake assessment and technical assistance to 1,000 clients; workshop classes to over 600 individuals; fund loans up to \$3 mm; increase employment opportunities and newly create 100 jobs for low-to-moderate income Oakland residents; oversight management of the Oakland Business Development Corporation, Small Business and Growth Center, Ultimate Staffing Services and the implementation of a Neighborhood Property Redevelopment Program (NPRReP) coordinating with the Neighborhood Commercial Revitalization (NCR) unit.</p>	<p>The OSCS has assisted over 1,200 clients. Approximately 600 individuals attended one or more of 25 different business skills development workshops and seminars offered by business consultants and owners.</p> <p>The EEC Revolving Loan Fund made \$2.7mm in loans to businesses that created 77 jobs for low-to-moderate income Oakland residents. Staff provided oversight and management of the Oakland Business Development Corporation, the Oakland Small Business Growth Center, Ultimate Staffing Services and the National Development Council.</p>

**ENHANCED ENTERPRISE COMMUNITY REVOLVING LOAN FUND
(PROVISIONS FOR BUSINESS ASSISTANCE)**

ACTIVITY NAME	DESCRIPTION OF ACTIVITY	CATEGORY OF RESIDENTS	PROGRAM AND RESOURCES	ONE YEAR GOALS	ACCOMPLISHMENTS
New Oakland Cattle Company	EEC Funded	Benefit low-moderate income residents	HUD 108 EEC: \$375,000 HUD EDI: \$150,000	To assist applicant to expand business operations.	Provided working capital for livestock purchase (herd expansion). Loan is fully approved but not yet funded.
United Market	EEC Funded	Benefit low-moderate income residents	HUD 108 EEC: \$145,000 EEC EDI: \$105,000	To assist applicant to expand business operations.	Loan fully approved but not yet disbursed.
Upland Sports Group	EEC Funded	Benefit low-moderate income residents	HUD 108 EEC: \$ 99,999	To assist applicant to expand business operations.	Approved and disbursed. Loan for professional level (racing) bicycle supply shop.
Nellie's Restaurant	EEC Funded	Benefit low-moderate income residents	HUD 108 EEC: \$ 95,000	To provide funds to expand business.	Loan approved but not yet funded.

3. Public Services and Infrastructure(Neighborhood Improvements)

(A) Public Services

In keeping with the goals established by the Oakland City Council and the Five-year Consolidated Plan Strategy, the City of Oakland allocated FY02-03 funding for public service activities to be carried out through 30 subrecipient agreements with 25 private, nonprofit agencies that serve low- and moderate-income persons in the seven Community Development Districts of Oakland. In addition, 7 City-administered programs were funded. The activities are in the categories identified in the Strategic Plan for Non-Housing Community Development Needs contained in the Consolidated Plan for July 1, 2000 to June 30, 2005. The number of programs by category are as follows:

Anti-Crime	4
Employment Training	2
Hunger Relief	2
Senior Services	7
Social Services	2
Substance Abuse Intervention and Prevention	2
Youth Services	13

One of the subrecipient agreements was not implemented during FY02-03. The agreement for Oakland ReLeaf/Urban Forestry Program (in the Youth Services category) has been delayed pending submission of required data by the subrecipient.

Because of staff reductions, two of the City administered activities were partially implemented during FY02-03.

- The Office of Parks and Recreation/Hip Hop Urban Dance Program is underway and has served 10 of 136 youth.
- The Office of Parks and Recreation/Technology Literacy Program is underway and has served 227 of 240 youth.

(B) Infrastructure (Neighborhood Improvements)

Consistent with the Five-year Strategy to meet the needs of low- and moderate-income Oakland residents, funds from the FY02-03 grant were allocated for 3 private, nonprofit agencies to assist with affordable housing development, design and construction of a community activity center, leasehold improvements for a health care center, capital improvements to a multi-service community center; and commercial façade and street improvements. In addition, renovations were done to two 2 City owned recreational facilities.

CDBG Infrastructure (Neighborhood Improvements) and Public Services (summary)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Anti-Crime <ul style="list-style-type: none"> ▪ <i>A Safe Place</i> ▪ <i>Family Violence Law Center</i> ▪ <i>Laurel Jujitsu-American Judo & Jujitsu Federation</i> ▪ <i>Law Center for Families</i> 	Domestic violence prevention Legal assistance Crisis counseling Support services Self-defense skills Anger management training Outreach and education	808 individuals	901 individuals
Employment Training <ul style="list-style-type: none"> ▪ <i>International Institute of the East Bay</i> ▪ <i>Jobs for Homeless Consortium</i> 	Employment training and placement	91 individuals	92 individuals
Hunger Relief <ul style="list-style-type: none"> ▪ <i>Alameda County Community Food Bank</i> ▪ <i>CEDA Supplemental Hunger Program</i> 	Food purchase & distribution	64,369 individuals	87,497 individuals
Seniors <ul style="list-style-type: none"> ▪ <i>Aging, Health & Human Services/Senior Companion Program</i> ▪ <i>Alzheimer's Services of the East Bay</i> ▪ <i>Bay Area Community Services</i> ▪ <i>Grandparents & Relatives as Second Parents</i> ▪ <i>Legal Assistance for Seniors</i> ▪ <i>Life Long Medical Care-Over 60 Health Center</i> ▪ <i>St. Mary's Center</i> 	Case management Information & referral Needs assessment Counseling & support services In-home companion services Legal services Day care Outreach & education Medical & social services Hot meals Respite for caregivers	5,232 individuals	3,128 individuals
Social Services <ul style="list-style-type: none"> ▪ <i>East Bay Central American Refugee Committee</i> ▪ <i>Library Services/Golden Gate Library Computer Lab</i> 	Computer training Family support and assistance	3,935 individuals	2,148 individuals
Substance Abuse <ul style="list-style-type: none"> ▪ <i>Healthy Babies Project</i> ▪ <i>Phase III</i> 	Residential and day treatment Support services Referrals	90 individuals	87 individuals

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Youth <ul style="list-style-type: none"> ▪ Alameda County Health Care Foundation ▪ Camp Fire Boys & Girls ▪ Girls Inc. of Alameda City ▪ La Clinica de la Raza-Fruitvale Health Project ▪ Life Enrichment Agency/ Safe Passages Home ▪ Oakland ReLeaf ▪ Parks & Recreation/Drum and Percussion Academy ▪ Parks & Recreation/Poplar Hip Hop Urban Dance Program ▪ Parks & Recreation/Technology Literacy Program ▪ Project Re-Connect ▪ Project SEED (6 contracts) ▪ Sports4Kids ▪ The First Place Fund for Youth 	<p>Work experience and career preparation</p> <p>Case management</p> <p>Tutoring and academic assistance</p> <p>Cultural and life enrichment</p> <p>Computer instruction</p> <p>Health care</p> <p>Tree planting and care</p> <p>Sports and fitness programming</p> <p>Housing search assistance</p> <p>Counseling and support services</p> <p>Recreational activities</p> <p>Safety monitoring</p>	13,994 individuals	13,653 individuals
Neighborhood Improvements (Infrastructure) <ul style="list-style-type: none"> ▪ Friends of Peralta Hacienda Historical Park ▪ Parks & Recreation/Bushrod Recreation Center Basketball Court Lighting ▪ Parks & Recreation/Bushrod Recreation Center Storage Shed ▪ Spanish Speaking Citizens' Foundation ▪ Schuman-Liles Clinic 	<p>Community activity center design and construction</p> <p>Improvements to recreational centers</p> <p>Improvements to multi-service center</p> <p>Improvements to health center</p>	5 Facilities	3 Facilities

* City Administration projects

Narrative B: Fair Housing

Summary of the Analysis of Impediments to Fair Housing

The City of Oakland's Community and Economic Development Agency completed an Analysis of Impediments to Fair Housing (AI) in 1997. (A revised AI is under development. Preparation of this update was deferred until 2000 Census data was available that would allow for an analysis of more recent demographic data than was available for the 1997 AI.) The following narrative is a summary of this analysis.

Oakland is a City with considerable ethnic and racial diversity. It is also a City with a large number of minority and low-income households that face particular problems securing decent housing, as do families with children and persons with disabilities. Patterns of racial clustering and segregation are readily identifiable, suggesting that discrimination continues to be a serious problem and an impediment to fair housing choice.

Information provided by fair housing organizations provides additional evidence of discrimination, as revealed in both individual complaints and systemic fair housing audits.

The most significant barrier to fair housing, however, is the lack of affordable housing. Because minorities are more likely than non-minorities to be low-income, the housing problems of low-income people are most acutely experienced by minority households. The lack of funding and suitable sites for the development of new affordable housing thus serves to limit fair housing choice.

Adding to the difficulty of providing affordable housing is a rising sentiment of opposition to the development of new assisted rental housing. This opposition, while based on fears of safety, traffic congestion, and reduced property values, is often based on misperceptions of the type of housing that is proposed and by stereotyped impressions of the characteristics of the households that will occupy the housing.

Discrimination in lending is also a problem, as revealed by the analysis of rates of mortgage loan approvals and denials reported in annual data collected under the Home Mortgage Disclosure Act.

To some extent, City zoning and land use practices may also act as a barrier to housing choice for some persons with disabilities.

Actions Taken to Overcome Impediments to Fair Housing

The narratives and table on the following pages summarize actions taken in the 2000-2001 program year to overcome impediments to fair housing. The table identifies impediments described in the AI and specific actions taken to remove those impediments.

Actions to Affirmatively Further Fair Housing

1. The City and Redevelopment Agency require that all projects that receive public assistance, whether funded with federal or non-federal funds, comply with the City's Affirmative Fair Marketing guidelines. A copy of these guidelines is included in each year's Consolidated Plan Action Plan.
2. In response to two complaints regarding discrimination against persons with disabilities and compliance with federal accessibility requirements, in 2000 the City and HUD entered into a Voluntary Compliance Agreement (VCA). During the 2002-03 program year, the City developed a plan for marketing accessible units to people with disabilities who require accessible features as part of the Voluntary Compliance Agreement (VCA). Input was received from the Oakland Mayor's Commission on Persons with Disabilities which includes representatives of local organizations serving people with disabilities, such as the Center for Independent Living and Community Resources for Independent Living. The City has received verbal approval from HUD for this plan.
3. Efforts to increase private lending activity in minority areas through community reinvestment efforts.

The City continues to be an active participant in efforts to ensure that lenders comply with their obligations under the Community Reinvestment Act. The City has a linked-banking ordinance that limits the City's banking business to lending institutions that are meeting community credit needs.

4. Efforts to improve housing conditions and housing opportunities within areas of minority concentration through the use of targeted investment of federal resources.

The City's lending programs for rehabilitation of owner-occupied housing are targeted to the seven Community Development Districts, which have the highest concentrations of minority households.

To provide greater housing opportunities for minorities, the City gives higher ranking to applications to develop new housing in areas with low concentrations of poverty, which are also areas with lower concentrations of minorities.

Fair Housing Activities

IMPEDIMENT ACTION RESPONSIBLE ORGANIZATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Community Opposition to the Siting of Affordable Housing</p> <p>Community Outreach and Education</p> <p><i>East Bay Housing Organizations</i></p> <p><i>Non-Profit Housing Association of Northern California</i></p>	<p>Affordable housing tours, presentations, public education</p>	<p>Promote greater awareness of need for and benefits of affordable housing.</p>	<p>The City participated in a number of activities designed to increase public awareness of the need for affordable housing and public acceptance of new housing developments. The City provided assistance to East Bay Housing Organizations for its annual Affordable Housing Week, which included tours, presentations and similar activities.</p>
<p>Discrimination Against Persons with Disabilities</p> <p>Education, counseling, investigation and advocacy</p> <p><i>Center for Independent Living Housing Rights</i></p>	<p>Provide housing services and housing-rights counseling to persons with physical and mental disabilities</p>	<p>Facilitate access to housing for low-income persons with disabilities</p> <p>Provide information, referrals, counseling and/or accessible van rides to 250 people with disabilities</p>	<p>Provided housing search counseling services were to 389 individuals. Provided information and referral sources to 325 individuals. 339 individuals made phone calls seeking advice. 359 individuals were provided with discrimination counseling. 65 of these individuals received technical assistance, and 145 were referred to legal services or housing advocacy organizations. 52 contacts were made to agencies informing them of CIL's services. 8 van or cab services were arranged. 19 media contacts were made; 18 public speaking engagements were made; and 1,346 flyers were distributed.</p>

IMPEDIMENT ACTION RESPONSIBLE ORGANIZATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Discrimination in Rental Housing General Tenant Issues with Disparate Impact on Minorities Counseling, education and advocacy <i>East Bay Community Law Center</i></p>	<p>Provide free legal assistance with housing related problems</p>	<p>Tenant workshops, telephone and in-person counseling to 400 people, and information distribution</p>	<p>Held 22 tenant workshops. Counseled 607 individuals through the Low Income Eviction Project. Provided 95 individuals with legal representation.</p>
<p>Discrimination Against Families with Children Education, counseling, investigation and advocacy <i>Housing Rights, Inc.</i></p>	<p>Investigate cases of housing discrimination against families with children</p>	<p>Facilitate access to housing for families with children 420 information and referrals Investigate 30 fair housing cases</p>	<p>Provided counseling to 395 households and legal assistance to 40 households. Provided 318 housing referrals. Investigated 40 fair housing cases, of which 4 were referred to HUD or DFEH. Distributed 9,342 information packets. Held 44 fair housing workshops.</p>
<p>Discrimination Against Protected Classes Education, counseling, investigation and advocacy <i>Sentinel Fair Housing</i></p>	<p>Investigate, mediate and refer in cases of housing discrimination</p>	<p>Facilitate access to housing for low-income persons 2,600 information and referrals Investigate 65 fair housing cases (A portion of the funding for this organization is supporting eviction prevention activities)</p>	<p>Provided fair housing information and referrals to 2,789 people. Investigated 73 fair housing cases. Held 34 community engagements and 12 law training workshops. Conducted 10 Oakland housing discrimination tests. Distributed 2,773 sets of educational materials.</p>

IMPEDIMENT ACTION RESPONSIBLE ORGANIZATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Discriminatory Lending Practices Education, advocacy, legislation <i>City of Oakland</i></p>	<p>Reduce incidence of "predatory lending practices" that have a disparate impact on minority households</p>	<p>Not specifically identified in Action Plan</p>	<p>Anti-predatory lending legislation was adopted by the City Council to prohibit predatory lending practices and prohibit the City from banking with firms engaged in predatory lending. The ordinance has been challenged in court; an appeal is pending.</p>
<p>Increase Access to Housing for Persons with Disabilities Education, marketing <i>City of Oakland</i></p>	<p>Provide updated information to persons with disabilities about federally-assisted accessible units available in the City. The City intends to contract with a consulting firm that will develop a marketing plan</p>	<p>The City intends to contract with a consulting firm that will develop a marketing plan to:</p> <ul style="list-style-type: none"> • Identify and track accessible units developed or available in City-funded projects. • Identify and inform prospective disability-related organizations and individuals of the availability of the units using a variety of media formats. • Identify policies that sub-recipients must follow to assure that accessible units are advertised and filled by qualified disabled occupants whenever possible. 	<p>The City received verbal approval from HUD on its affirmative marketing policies to be used by developers of assisted housing to reach persons with disabilities.</p>

IMPEDIMENT ACTION RESPONSIBLE ORGANIZATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Increase Success Rates for Recipients of Section 8 Rental Assistance</p> <p>Outreach, education</p> <p><i>Oakland Housing Authority</i></p>	<p>Monitor trends affecting success rates. Because the significant majority of Section 8 participants are minorities, improving Section 8 success rates will expand housing opportunities for minority households.</p>	<p>Track movements of Section 8 recipients. Provide training and assistance in housing search techniques.</p>	<p>A softening of the rental market has resulted in a significant increase in success rates for Section 8 recipients.</p> <p>The City mapped the location of all Section 8 vouchers -- participants are using vouchers throughout all areas of the City that have rental housing stock.</p>

Narrative C: Affordable Housing

This narrative describes actions taken to preserve, improve and expand the supply of affordable housing for low- and moderate-income households. It also includes information on actions undertaken to meet the needs of non-homeless persons needing supportive housing.

Information on actions to address homelessness may be found in Narrative D: Continuum of Care, and in the program-specific narrative for the Emergency Shelter Grant (ESG) program.

Additional information on assistance to homeless and non-homeless persons with AIDS may be found in the program-specific narrative for the Housing Opportunities for Persons With AIDS (HOPWA) program.

1. Funds Made Available

The following is a listing of new Federal grant funds that were made available to the City in FY 2003-2004, and how those funds were allocated among uses. Although these funds were allocated during the fiscal year, the commitments and expenditures that were made by the City included funds received and obligated in prior years.

A summary of *allocations* of housing funds made during the fiscal year for housing development and first-time homebuyer activities, using both Federal and non-Federal funds regardless of the year the funds were first made available, is included in Section F: Leveraging and Match. Section F also includes a listing of other funds (local government, private, and Federal funds made available to entities other than the City for housing activities) that were made available.

Detail on actual *commitments* and *expenditures* of Federal formula grant funds is contained in the IDIS system.

Listings of specific commitments made with HOME, Emergency Shelter Grant (ESG) funds and Housing Opportunities for Persons With AIDS (HOPWA) funds are included in the Program-Specific Narratives for each of those programs.

Community Development Block Grant (CDBG)

The City allocated \$5,620,250 in CDBG funds for housing activities, including housing rehabilitation programs, homeless programs and a number of housing services.

Rental Rehabilitation Program

A total of \$593,277 was received in program income (loan repayments) derived from loans made under the now-discontinued Federal Rental Rehabilitation Program. These funds were allocated to provide additional funding for the Home Maintenance and Improvement Program (HMIP) to provide loans for rehabilitation of owner-occupied homes.

HOME

The City received a total HOME grant of \$4,918,000. Funds were allocated to the following uses:

Housing Development	4,180,300
Administration/Monitoring	491,800
<u>CHDO Operating Support</u>	<u>245,900</u>
TOTAL	\$4,918,000

Emergency Shelter Grant (ESG)

The City received \$363,000 in Emergency Shelter Grant Funds, of which \$18,150 was used for program administration, and \$344,850 was used to provide grants to providers of emergency shelter and services.

Supportive Housing Program

The City received \$2,070,300 in Supportive Housing Program grants for its Homeless Relief Programs.

In addition, a total of \$3,213,671 was awarded through the HUD SuperNOFA process to other homeless assistance programs located in Oakland.

Housing Opportunities for Persons With AIDS (HOPWA)

The City received \$1,849,000 in funds under the Housing Opportunities for Persons with AIDS (HOPWA) program. The City is the lead agency for the metropolitan area, and distributed funds to Alameda and Contra Costa counties based on the relative proportion of AIDS cases, as follows:

Alameda County	\$1,479,467
Contra Costa Count	\$469,842
<u>Program Administration</u>	<u>\$19,600</u>
TOTAL	\$1,969,000

2. Characteristics of Persons Assisted with Housing

Information on the racial and income characteristics of persons assisted with housing financed with Federal grant funds is contained in the Integrated Disbursement and Information System (IDIS), a centralized database system maintained by HUD.

Summary information contained in the table included at the end of this Section C includes persons assisted with HOME, CDBG, ESG, HOPWA and other federal funds, for projects and activities completed during the program year.

3. Geographic Distribution of Assistance

Maps showing the geographic distribution of first-time homebuyer, housing rehabilitation, and housing development activities funded with HOME and CDBG funds are included at the end of this section. Maps are also provided for activities assisted with ESG and HOPWA funds. The accomplishment tables in this section provide more specific information on the location of housing activities, regardless of whether Federal or non-Federal funds were used.

4. Efforts to Meet "Worst-Case Needs"

The City has undertaken efforts to assist persons with "worst-case needs." These include:

- Persons with disabilities;
- Households living in substandard housing;
- Low-income households paying more than 50% of income for rent; and
- Households that have been involuntarily displaced by public action.

For persons with disabilities, a principal focus of the City's housing efforts has been the expansion of the supply of affordable housing for persons with AIDS. The City has used HOME and Redevelopment Agency funds, in conjunction with funding from the Section 811 program, for new construction of such housing. Funding for new construction and rental assistance is also provide under the HOPWA program.

The City provides rehabilitation assistance for homeowners who are living in housing that is dilapidated or substandard. The City's code enforcement program is intended to encourage owners to bring their properties up to code. Continued violations of housing code requirements result in liens against the property, providing financial incentives for owners to complete the necessary work. In extreme cases, the City may order a property be closed and the tenants relocated. Under the City's Code Enforcement Relocation Ordinance, the City provides relocation assistance to these tenants and then places a lien against the substandard property for the cost of the relocation.

The City also seeks to expand assistance for low income persons with high cost burdens. City-assisted housing developments require that 10 percent of all units have rents equal to 30 percent of the monthly income of households at or below 35% of median income, in order to provide affordability to a broader range of low income persons, particularly those currently experiencing high cost burdens. The City also uses project-based and tenant-based rental assistance to assist extremely low income households. The City has worked closely with the Oakland Housing Authority (OHA) to expand the use of project-based Section 8. However, federal regulations prohibit the use of project-based Section 8 in census tracts with a poverty rate greater than 20

percent. This effectively excludes the majority of Oakland's rental housing stock. The City and OHA are continuing to seek ways to obtain waivers of this rule.

Affordable housing developments assisted by the City or the Redevelopment Agency require that preference be given to persons who have been displaced by public action.

5. Detailed Status of Housing Activities

The tables on the following pages provide detailed information on all housing activities undertaken by the City, regardless of whether they were financed with federal funds. Information on actions to prevent and reduce homelessness is contained separately in Section D.

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
10211 Byron <i>Elmhurst</i>	Site acquisition of a lot for 50 future rental housing units and a church	Begin predevelopment	No activity on project due to issues in development partnership.
10900 Edes Ave. <i>Elmhurst</i>	Site acquisition of a lot for 20 future homeownership units	Complete acquisition	Acquisition completed. Obtained EPA grant for brownfield clean-up. Started predevelopment work.
1091 Calcot St. <i>Fruitvale/San Antonio</i>	Site acquisition of a lot for 73 future rental housing units	Complete acquisition	Developer withdrew application.
1173 28 th St. <i>Eastlake/San Antonio/Chinatown</i>	Site acquisition of a lot for 47 future live/work loft rental units and a 4,000 sq.-ft. workshop	Complete acquisition	Developer withdrew application.
1574-90 7 th St. <i>Western Oakland</i>	Site acquisition of a lot for 12 rental units or 7 town home units.	This project was not included on the Action Plan as it was not initiated until after the Plan was adopted.	Developer withdrew application.
160 14 th St. <i>Eastlake/San Antonio/Chinatown</i>	<i>See Madison Lofts.</i>		
2001 Linden St. <i>Western Oakland</i>	Site acquisition of a lot for 8 future rental housing units	Begin predevelopment	Started predevelopment activities..
2946 International Blvd. <i>Fruitvale/San Antonio</i>	<i>See Native American Health Center.</i>		
4862-4868 Calaveras <i>Outside of Community Development Districts</i>	Site acquisition of 2 lots for 65 future rental housing units	Begin predevelopment	Started predevelopment activities.
5825 Foothill <i>Central East Oakland</i>	<i>See Foothill Town Homes.</i>		

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
AACWA Homeownership Project Scattered Sites <i>Multiple Areas</i>	New construction of 9 homeownership units	Begin construction	Funding commitment cancelled in October 2002 because the developer was not able to secure all funding commitments within a one-year time frame, as required by the City Council resolution authorizing the project.
Casa Velasco [Casa de las Flores] 3430 Foothill Blvd.	Rehabilitation/preservation of 20 units of existing senior housing. Included minor enlargement with community space and garden.	This project was not included on the Action Plan as it was not initiated until after the Plan was adopted.	Currently under construction. Construction began in February 2003.
Chestnut Court HOPE VI – Ownership Chestnut St. at 24 th St. 32 nd at Martin Luther King Jr. Way 1114 14 th St. 1070 24 th St. 1431 Myrtle St. <i>Western Oakland</i>	New construction of 15 for-sale homes and 3 turnkeys (18 total)	Complete construction by June 2003, begin sales.	The number of units was reduced to 15. The 3 turnkey units (at 1431 Myrtle and 1070 24 th) were eliminated from the project. 14 of 15 units have been completed. Six of those units were sold to first time homebuyers making not more than 80%AMI.
Chestnut Court HOPE VI – Rental Chestnut St. at 24 th St. <i>Western Oakland</i>	New construction of 68 rental housing units of rental housing and redevelopment of 83 public housing units 24 1-bdrm units 41 2-bdrm units 63 3-bdrm units 7 4-bdrm units 6 5-bdrm units	Complete construction.	Construction and occupancy of Chestnut Court building (72 units). Linden Court building (79 units) will be completed and fully occupied in August, 2003.
Coliseum Gardens HOPE VI - Ownership <i>Central East Oakland</i>	Development of 33 for-sale homes	Issue RFP, select developer and secure financing	RFP issued and developer selected.

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Coliseum Gardens HOPE VI - Rental 6745 Brentford St. and offsite <i>Central East Oakland</i>	178 public housing and 442 tax-credit rental units	Obtain HUD approval of Revitalization Plan	RFP issued and developer selected. Redevelopment agency and City have each committed \$1.5 million for Phase I of construction.
Drachma Rental 9 locations <i>Western Oakland</i>	Rehabilitation of 19 rental housing units	Complete rehabilitation	14 units completed, and 9 occupied. Remaining 5 units in final stage.
EBALDC – Homeplace Initiative Prescott Homeownership Program 1311 Campbell St., 1728 14 th St., 820 Peralta <i>Western Oakland</i>	New construction of 3 homeownership units 2 3-bdrm units 1 4-bdrm units	Negotiate and finalize DDA	EBALDC program will not go forward. Instead, Paul Wang Enterprises will develop 1311 Campbell St. site and 820 Peralta St. as 3 bedroom units. In addition, 1728 14 th St. is the subject of a promising proposal for two live-work rental units affordable at 80% of median income, with Nick Pukatch, the owner of adjacent vacant lot, as developer.
Faith Housing Corner of 7 th St. and Campbell St. <i>Western Oakland</i>	Land assembly for 70 affordable housing units	Complete land assembly through the Site Acquisition Program	Fourth parcel acquired with Agency funds. Fifth and final parcel to be acquired with LISC loan.
Foothill Town Homes 5825 Foothill <i>Central East Oakland</i>	Site acquisition of a vacant bowling alley and 3 lots for 30 future townhouses for homeownership.	Complete acquisition	Acquisition completed. Predevelopment activities started.
Fruitvale Transit Village 3300-3400 E-12 th St. <i>Fruitvale/San Antonio</i>	Large transit-oriented mixed-use development 10 of 47 housing units to be affordable rental units 4 1-bdrm units 6 2-bdrm units 85,000 sq. ft. commercial 68,000 sq. ft. community center	Start construction of residential units	Construction 80% completed. Construction projected to be completed in October 2003.

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Habitat Fruitvale Avenue 2662 Fruitvale Ave. <i>Fruitvale/San Antonio</i>	New construction of 4 homeownership Units	4 units to be completed by September 30, 2003	Construction on schedule.
Horizon Townhouses - Ownerships 9800, 9809-15 MacArthur Blvd. <i>Elmhurst</i>	18 new, affordable 3- and 4-bdrm homeownership townhouse units for families	Complete financing, start construction	Financing completed. Construction documents 90% complete. Project changed to construction of 14 units, rather than 18. Construction projected to start in September 2003.
International Boulevard Family Housing Initiative Phase II 6006 International Blvd. <i>Central East Oakland</i>	New construction of 24 rental housing units 5 1-bdrm units 6 2-bdrm units 11 3-bdrm units 2 4-bdrm units	Complete construction by Jan. 30, 2003	Construction will be completed by January 30, 2004.
Leola Terrace, Phase II 90 th Ave. at MacArthur Blvd. <i>Elmhurst</i>	New construction of 4 single-family detached homeownership units Rehabilitation of 8 of the existing units	Begin construction by July 2002 Complete construction by December 2003	The owner/seller of the 4 parcels for the new units terminated the purchase agreement with the proposed affordable housing developer. The non-profit owner subsequently sold the parcels to another developer for market rate housing. Rehabilitation of 8 existing units.
Lake Merritt Apartments 1417 First Ave. <i>Eastlake/San Antonio/Chinatown</i>	Preservation of 55 existing rental units for low-income seniors. Affordability will be extended for 55 years, and the building renovated.	Submit TCAC Application July 2002 Close escrow and acquire property September 2002 Start renovations October 2002 Complete renovations May 2003	TCAC funds awarded August 2002. Escrow closed October 1, 2002. Renovations began late November; completed January 2003. Cost certification under review.
Madison Lofts 160 14 th St. <i>Eastlake/San Antonio/Chinatown</i>	Site acquisition of a lot for 76 future live/work loft rental units and ground floor retail space	Begin predevelopment	Started predevelopment activities.

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Mandela Gateway-Rental 1364 and 1420 7th St. <i>Western Oakland</i></p>	<p>121 new units of low-income family housing and replacement of 46 dilapidated units at Westwood Gardens OHA and the developer BRIDGE are buying additional sites nearby to provide the 167 new family rental units Project also includes commercial space</p>	<p>Secure remainder of funding Complete construction documents</p>	<p>Acquisition of additional sites completed. Sites incorporated in this 167 unit project. All loans are closed. Construction started in Feb. 2003. (Project formerly known as Westwood Gardens.)</p>
<p>Martin Luther King Jr. Plaza Homeownership Project 5756 Martin Luther King Jr. Blvd. <i>North Oakland</i></p>	<p>New construction of 11 3-bdrm homeownership units and a neighborhood park</p>	<p>Complete construction by September 2002</p>	<p>Construction completed in August 2002. Sales are projected to be completed in the fall and winter of 2003. Six units are to be affordable at 80% of median income and five units are to be affordable at 120% of median income.</p>
<p>Native American Health Center 2946 International Blvd. <i>Fruitvale/San Antonio</i></p>	<p>Site acquisition of a lot for 54 future rental housing units and commercial space</p>	<p>Complete acquisition</p>	<p>Acquisition completed. Agency funding commitment for \$2,211,000 obtained. Predevelopment work started.</p>
<p>North Oakland Vacant Lot Program 3881 Martin Luther King Jr. Way 865 43rd Street <i>Western Oakland and North Oakland</i></p>	<p>New construction of 2 or 3 3-bdrm homeownership units</p>	<p>Although the developer received an allocation of City funding to develop three affordable homes, rapidly rising development costs have made the intended sales prices unattainable. At present, it is unclear whether the project will ever obtain the sufficient subsidy to proceed as planned</p>	<p>Project has been postponed indefinitely.</p>
<p>NCLT Homeownership Program Land Trust Model 3032 and 3102 Linden St <i>Western Oakland</i></p>	<p>New Construction homeownership 4 units: 1-1br, 2-2br and 1-3br</p>	<p>This project was not included in the Action Plan.</p>	<p>Construction Complete.</p>

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Northgate Apartments—Rental 2301 Northgate Ave. <i>Western Oakland</i>	New construction of 42 rental housing units 4 4-bdrm units 25 3-bdrm units	Apply for tax credits; if awarded, begin construction	Full financing achieved and construction begun.
Oak Park Apartments 2616 E16 th St. <i>Fruitvale/San Antonio</i>	Rehabilitation of an existing 56-unit apartment complex to reconfigure the building into 32 rental units 8 13-bdrm units 5 3-bdrm units 15 16-bdrm units 4 2-bdrm units 1 Manager's Unit	Start rehabilitation by December 2002	Rehabilitation work started. Construction of Phase I completed. Construction of Phase II projected to start in August 2003 and be completed in July 2004. Project changed to reconfigure existing complex in to 36 rental units, rather than 32.
Oakland Citywide Community Land Trust Ownership <i>Citywide</i>	Development of 40-50 units of new or substantially renovated low-income ownership housing to become part of a community land trust.	This project was not included on the Action Plan as it was not initiated until after the Plan was adopted.	Board of Trustees formed; development consultants hired; fiscal sponsor identified; \$250,000 contract for operating support from the Agency executed.
Oakland Housing Authority Homeownership Program 1430 8 th St. 816 Center St. <i>Western Oakland</i>	New construction of 3 4-bdrm homeownership units	Negotiate and finalize DDA	No action taken on project because Oakland Housing Authority has withdrawn its interest. Developer Nick Pukatch is considering developing the sites, but his plans are contingent upon the acquisition of an adjacent privately owned corner site.
Palm Court 10 th St. at Union St. <i>West Oakland</i>	12 for-sale single-family detached housing units	Negotiate loan documents, begin construction	Loan documents under negotiation. Additional Redevelopment Agency action necessary due to uniqueness of developer's (Habitat for Humanity) financing model.

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Palm Villa (formerly MacArthur Park) MacArthur Blvd. between 90th and 94th Ave. <i>Elmhurst</i></p>	<p>New construction of 78 single-family detached homeownership units 4 4-bdrm units 74 3-bdrm units</p>	<p>Complete construction and close on all phases by December 2002</p>	<p>Construction of Phase II completed. 19 units were sold to first time homebuyers. Construction of the 3rd/final phase is anticipated to be completed in Dec. 2003.</p>
<p>Paul Wang Infill Project 1226 94th Ave. 1063 82nd Ave. <i>Elmhurst</i></p>	<p>New construction of 3 homeownership units</p>	<p>Complete third unit</p>	<p>Third unit completed and sold.</p>
<p>Rental Housing Acquisition and Rehabilitation Program (R-HARP) <i>Citywide</i></p>	<p>Assist developer and existing property owners to acquire and/or rehabilitate occupied 3- to 20-unit rental properties located throughout the City. Units to remain affordable for a minimum of 55 years. Rehabilitated units may become rentals or homeownership units</p>	<p>Assist in funding the acquisition and rehabilitation of 15-20 units in occupied rental properties Provide up to \$50,000 per affordable unit</p>	<p>The program was terminated because it was determined to be infeasible. Funds reallocated to Agency's 2002 NOFA affordable housing projects</p>
<p>Santana Apartments 2220 10th Ave. <i>Eastlake/San Antonio/Chinatown</i></p>	<p>Capital improvement of 30 existing rental units 6 studios 12 1-bdrm units 6 2-bdrm units 6 3-bdrm units with supportive services</p>	<p>Complete capital improvements by September 2002</p>	<p>Capital improvements completed.</p>
<p>Southlake Tower Apartments 1501 Alice St. <i>Western Oakland</i></p>	<p>Preservation of 130 existing units of very affordable Section 8 senior housing at risk for conversion to market-rate.</p>	<p>Christian Church Homes (CCH), currently manages the property and will appoint the Board of the single-asset ownership entity that will be the final project owner.</p>	<p>CCH acquisition of property complete. City and Agency loans closed.</p>

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Toler Heights New Housing Development (Black Phoenix Housing) 2475 and 2515 98th Ave. 98th Ave. at Stearns Ave. <i>Elmhurst</i></p>	<p>New construction of 6 homeownership units</p>	<p>Construction to be completed by June 30, 2003</p>	<p>Predevelopment proceeding, including construction plans and financing.</p>
<p>UniDev-Workforce Housing Program <i>Citywide</i></p>	<p>Study into potential for development of 250 or more units of workforce housing on publicly owned land, using minimal public subsidies. Assist developers in the acquisition and rehabilitation of 1- to 20-unit vacant and blighted residential properties located throughout the City</p>	<p>This project was not included on the Action Plan as it was not initiated until after the Plan was adopted.</p>	<p>Funding for Agency contribution to feasibility study secured April 2001; conversations with potential partners underway and on-going. 1 project completed (1 unit).</p>
<p>Vacant Housing Acquisition & Rehabilitation Program (V-HARP) <i>Citywide</i></p>	<p>Rehabilitated units may become rentals or homeownership units Units to remain affordable for 55 years if they become rentals and for 45 years if they become homeownership units</p>	<p>Assist in funding the acquisition and rehabilitation of 10 to 15 units in vacant blighted properties. Provide up to \$100,000 per affordable unit</p>	<p>Program expanded to include vacant sites as well as vacant structures. New marketing program being developed</p>
<p>Vacant Lot Infill Program (formerly Citizens Housing Scattered Sites) <i>Various locations</i></p>	<p>New construction of 19-25 homeownership units</p>	<p>Negotiate comparable development scheme with new developer</p>	<p>Paul Wang Enterprises secured as developer for project of 23 scattered site homes. Basic points of DDA completed. One unit transferred to Paul Wang Enterprises and completed in November 2002. Unit was sold to and occupied by a family earning 80% of median income in March 2003.</p>
<p>Westwood Gardens Rental 1364 and 1420 7th St. <i>Western Oakland</i></p>	<p><i>See Mandela Gateway.</i></p>		

Priority (H-a): Preservation and Expansion of the Supply of Affordable Housing (cont'd)

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Westwood Gardens HOPE VI - CEDA Area Ownership 8th St. between Kirkham St. and Center St. <i>Western Oakland</i></p>	<p>New construction of 19 for-sale homes</p>	<p>Complete property acquisition Begin homeownership counseling Secure financing and permit approvals</p>	<p>Acquisition complete. Financing and permit approvals largely secured.</p>

Priority (H-b): Assistance to First Time Homebuyers

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Down Payment Assistance Program for Public Safety Officers and Oakland Unified School District Teachers <i>Citywide</i></p>	<p>Assist first-time Oakland homebuyers employed by the Oakland Police Dept, Fire Services Agency, or OUSD teachers with deferred loans of up to \$10,000 (minimum of \$5,500).</p>	<p>Offer financial assistance to OUSD teachers and Oakland Police and Fire Services Employees to purchase homes.</p>	<p>3 loan applications were received and 3 were approved.</p>
<p>First-Time Homebuyers Mortgage Assistance Program (MAP) <i>Citywide</i></p>	<p>Assist first-time homebuyers with deferred loans of up to \$50,000.</p>	<p>Offer financial assistance to 50 first-time homebuyers. Continue to offer 24 homebuyer-education classes per year to 900-1,000 potential first-time homebuyers.</p>	<p>64 loan applications were received; 62 were approved; and 2 were withdrawn. 22 homebuyer-education classes were offered.</p>
<p>Lower San Antonio Multilingual Homeownership Center <i>Eastlake/San Antonio/Chinatown and Fruitvale/San Antonio</i></p>	<p>Assist first-time homebuyers with limited English skills to purchase homes.</p>	<p>Conduct first-time homebuyer workshops and provide on-going bilingual support in the home-buying process to 10-20 buyers.</p>	<p>1819 brochures regarding first-time homeownership were distributed; 358 people attended first-time homebuyers' workshops; and 124 people received individual counseling. 54 loans were pre-approved for financing. 14 homes were purchased through the program, and 6 were refinanced. 7 first-time homebuyers received post-purchase education.</p>

Priority (H-c): Housing Rehabilitation and Neighborhood Improvement

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Emergency Repair Program <i>7 Community Development Districts</i>	Emergency repair and rehabilitation financing (minimum loan of \$2,500 and maximum of \$7,500)	60 loan applications will be originated and 50 units will be rehabilitated	23 loan applications were received and 15 were approved. 35 housing units were rehabilitated.
Home Maintenance and Improvement Program <i>7 Community Development Districts</i>	Housing rehabilitation financing (deferred and amortized loans) of up to \$40,000 for rehabilitation of 1 - to 4-unit owner-occupied properties	60 loan applications will be originated and 50 units will be rehabilitated (note that these units may not be the same as for loans originated in this time period)	101 loan applications were received and 36 were approved. 32 housing units were rehabilitated.
Lead-Hazard Control Paint Program <i>7 Community Development Districts</i>	Exterior house-painting grants for homeowners	New HUD regulations regarding abatement of lead-based paint hazards have significantly increased the cost of painting homes. The goals for this program have been reduced accordingly. 20 single-family detached units will be repainted	23 grant applications were received. 38 housing units were repainted. The number of housing units repainted includes some applications from the previous fiscal year.
Minor Home Repair Program <i>Citywide</i>	Grants to seniors or disabled for minor home repairs. Administered by Alameda County.	Repair 150 housing units	155 housing units were repaired.

Priority (H-d): Rental Assistance for Extremely Low Income Families

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Family Unification Section 8 Rental Assistance	Rental assistance to families and individuals	The Oakland Housing Authority has instituted a program with CFPS to "graduate" families who have successfully reunified. This will allow more families to be served by freeing up Family Unification vouchers from the Authority's allocation. 17 new families will be served this year because of this policy	The Oakland Housing Authority welcomed sixteen new families into the Family Unification Program. OHA had screened twenty-one, but only sixteen were eligible to receive assistance.
HOPE VI 1999 Section 8	Rental assistance for residents living at 1999 HOPE VI sites	The Oakland Housing Authority will utilize existing Section 8 vouchers for residents living at Westwood Gardens whose units will be demolished and rebuilt as part of the 1999 HOPE VI program	The Oakland Housing Authority successfully relocated 38 families. Sixteen of those families used existing Section 8 Housing Choice Vouchers to find units in the community. The balance transferred selected to occupy public housing units. The Ground Breaking Ceremony for the project was held May 28, 2003.
HOPE VI 2000 Section 8	Rental assistance for residents living at 2000 HOPE VI sites	The Oakland Housing Authority will utilize existing Section 8 vouchers for residents living at Coliseum Gardens whose units will be demolished and rebuilt as part of the 2000 HOPE VI program	The Oakland Housing Authority successfully relocated 74 families. Forty utilized the Section 8 Housing Choice Vouchers to find units in the community. The balance selected to transfer to occupy public housing units.

Priority (H-d): Rental Assistance for Extremely Low Income Families (cont'd)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Project-Based Rental Assistance	Rental assistance to families and individuals	Project-based vouchers are funded from the Authority's existing tenant-based allocation. The Authority is working with the City and local nonprofits to receive a waiver from HUD to allow the Authority to utilize project-based assistance in Oakland	HUD decided not to grant blanket waivers such as the one sought by the Oakland Housing Authority. Instead, HUD required individual waivers for specific projects. The Authority was granted a waiver to project base 30 units at its Mandela Gateway Project. The Authority is awaiting Board and HUD approval of its Project Based Voucher Advertising and Selection Criteria. Once approval has been granted, the Authority will release an RFP for 220 project-based units.
Section 8 Mainstream Program	Rental assistance for disabled individuals and families	To lease all 75 vouchers and to apply for any new allocations that become available	All 75 Mainstream Vouchers were leased. The Oakland Housing Authority did not apply for new funding because it did not meet the criteria based on relative need on the locality.
Section 8 Rental Assistance Program	Rental assistance to families and individuals	Issue 300 new vouchers received from HUD in July 2001	The Oakland Housing Authority has met its goal and issued 300 new vouchers to families off the waiting list.
Shelter Plus Care Rental Assistance	Rental assistance to families and individuals	The Oakland Housing Authority will work with Alameda County to apply for new funding if available for Shelter Plus Care	The Oakland Housing Authority and Alameda have received continued funding for the Shelter Plus Care Program. As a result, approximately 72 families have been housed.

Priority (H-e): Housing for Seniors and Other Persons with Special Needs

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
1109 Oak St. <i>Downtown</i>	<i>See Oak Street Terrace</i>		
3829 Martin Luther King, Jr. Way <i>Western Oakland</i>	Site acquisition of a lot for 50 units of senior housing with community space on the ground floor.	This project was not included on the Action Plan as it was not initiated until after the Plan was adopted.	Started predevelopment activities.
Access Improvement Program <i>7 Community Development Districts</i>	Grants for accessibility modifications to 1- to 4-unit properties where owners or tenants have disabilities	Originate grant applications for 12 units Complete rehabilitation work on 10 units	15 grant applications were received and 11 applications were approved. 11 units were rehabilitated.
Armistice Powell Terrace 9507 Edes Ave. <i>Elmhurst</i>	New construction of 28 rental units	Project on hold due to issues of project density and zoning	Multi-family rental project will not be pursued. Instead, a single family development has been approved by CEDA.
Downs United Methodist Church Senior Housing 1027 62 nd St. <i>North Oakland</i>	New construction of 17 rental units 16 1-bdrm units 1 2-bdrm unit 1,815 sq. ft. of community space, supportive and community services	Begin construction March 2002 Complete construction November 2003	Project completed April 2003 and occupied May 2003.

Priority (H-e): Housing for Seniors and Other Persons with Special Needs (cont'd)

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Eastmont Court 6850 Foothill Blvd. Central East Oakland</p>	<p>19 units of housing for households with a disabled member</p>	<p>Begin construction by March 30, 2003</p>	<p>Development budget gap discovered Fall 2002 when bids from General Contractors were received. Developer applied for additional funding from a variety of sources. Received commitment from Federal Home Loan Bank (Affordable Housing Program) December 2002, HOPWA from Alameda County in May 2003, and City HOME funds June 3, 2003. Development gap closed by June 2003.</p>
<p>ECHO Home Equity Conversion Program Citywide</p>	<p>Counseling and advocacy for City of Oakland senior homeowners regarding all home-equity plans</p>	<p>Provide information and referrals, conduct group presentations to seniors citywide and counseling to 35 seniors interested in home equity conversions</p>	<p>Provided information and referral service to 145 seniors and counseled 41. Made 11 presentations, which were attended by 116 people. Distributed 378 information brochures. Disseminated 7 press releases/public service announcements.</p>
<p>Foothill and 68th St. Housing</p>	<p>See Eastmont Court</p>		

Priority (H-e): Housing for Seniors and Other Persons with Special Needs (cont'd)

ACTIVITY NAME LOCATION	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
<p>Housing Opportunities for Persons With AIDS (HOPWA) <i>Alameda County & Contra Costa County</i></p>	<p>Housing and continued services for individuals and families of individuals living with HIV/AIDS Acquisitions of housing units New construction of 7 units of permanent housing for persons with HIV/AIDS Additional units to be announced</p>	<p>Assist approximately 1,576 persons and/or families with HIV/AIDS shelter, transitional housing and permanent housing Maintain capacity of existing housing and support services, including the acquisition of existing licensed service-enriched emergency housing facilities for persons with AIDS Develop additional set-aside of 35 HIV/AIDS living units in non-HIV/AIDS situations Begin construction June 2002 Reserve funds for technical assistance and address emerging issues Continue Project Independence (shallow rent subsidy program)</p>	<p>Assisted approximately 1,340 individuals and families with HIV/AIDS shelter, transitional housing and permanent housing. Acquired existing 7-bedroom licensed service-enriched emergency housing facility and started rehabilitation work. Began development of 6 set-aside HIV/AIDS living units in non-HIV/AIDS targeted housing facilities and/or sites. Began construction of 41 projects in Alameda County. Completed construction of a 24-unit and a 17-unit permanent multi-family rental housing in Alameda County. Acquired property for New East Oakland Shelter site in Alameda County (20 HIV/AIDS dedicated units). 10 units developed and opened in Contra Costa County Started predevelopment activities.</p>
<p>Martin Luther King/MacArthur BART Senior Housing <i>Western Oakland</i> North Oakland Senior Homes (North Oakland Missionary Baptist Church Senior Housing) 3255 San Pablo Ave. <i>Western Oakland</i></p>	<p>Site acquisition of a lot for 50 units of senior housing with community space on the ground floor. New construction of 65 rental housing units for seniors 64 1-bdrm units 1 2-bdrm unit</p>	<p>This project was not included on the Action Plan as it was not initiated until after the Plan was adopted. Complete construction by July 2003</p>	<p>Construction completed. Rent-up started.</p>

Priority (H-e): Housing for Seniors and Other Persons with Special Needs (cont'd)

ACTIVITY NAME LOCATION CEDA Area	DESCRIPTION OF ACTIVITY	ONE YEAR GOALS	ACTUAL ACCOMPLISHMENTS
Oak Street Terrace 1109 Oak St. <i>Downtown</i>	Site acquisition of a lot for 39 future senior rental housing units	Begin predevelopment	Development received NOFA funding and all other funding commitments. Agency and developer negotiating loan documents. The Building Permit review is in progress.
Percy Abram, Jr. Senior Apartments 6400 San Pablo Ave. <i>North Oakland</i>	New construction of 46 units 45 1-bdrm senior units 1 2-bdrm manager unit Adjacent to existing Sister Thea Bowman Manor and will include community space, social services, staff services coordinator and entry plaza between the buildings <i>See Percy Abram, Jr. Senior Apartments</i>	Complete plans and apply for building permit by June 2003.	Plans are partially completed (less than 50%), but no permits have been acquired. (Project formerly known as Sister Thea Bowman Manor II.)
Sister Thea Bowman Manor II 6400 San Pablo Ave. <i>North Oakland</i>	<i>See Percy Abram, Jr. Senior Apartments</i>		

Households Assisted with Housing Using Federal Funds

Priority Need Category	Households
Renters	
0 – 30% of MFI	13
31 – 50% of MFI	35
51 – 80% of MFI	0
TOTAL	48
Owners	
0 – 30% of MFI	18
31 – 50% of MFI	13
51 – 80% of MFI	5
TOTAL	36
Homeless*	
Single Individuals	0
Families	188
TOTAL	188
Non-Homeless Special Needs	
TOTAL	0
TOTAL Housing	272
Total 215 Housing	272

See following pages for definitions of "Section 215" Housing.

Racial/Ethnic Breakdown	Hispanic	Non-Hispanic	Total Racial/Ethnic
Single Race	5	253	258
White	2	23	25
Black/African American	3	199	202
Asian	0	29	29
American Indian/Alaskan Native	0	2	2
Native Hawaiian/Other Pacific Islander	0	0	0
Multi-Race	4	18	22
American Indian/Alaskan Native & White	0	0	0
Asian & White	0	0	0
Black/African American & White	0	0	0
American Indian/Alaskan Native & Black/African American	0	0	0
Other Multi-Racial	4	18	22

Assisted households must meet all 3 of the following conditions:

1. Construction/rehabilitation work was completed and the unit was occupied; or
A first-time homebuyer moved into a housing unit; or
Rental assistance was provided for an existing housing unit.
2. The assistance must have resulted in a unit meeting Housing Quality Standards.
Minor repairs (exterior paint, etc.) are not included. Emergency shelter is not included.
3. **Only activities that were assisted with Federal Funds (HOME, CDBG, HOPWA, etc.) are included. Housing assisted with non-Federal funds, such as Oakland Redevelopment Agency funding, are not included pursuant to HUD instructions.**

Income, Rent and Sales Price Limits for Housing Meeting Section 215 Guidelines as Affordable Housing

Owner-occupied housing must be occupied by households with incomes less than eighty percent of median income, with values less than shown on the following schedule.

Renter-occupied housing must be occupied by households with incomes less than sixty percent of median income, with rents less than shown on the following schedule.

Income Limits

(For Units First Occupied from July 1, 2002 – April 10, 2003)

Income Level	Household Size							
	1	2	3	4	5	6	7	8 or more
0-30%	\$15,650	\$17,900	\$20,100	\$22,350	\$24,150	\$25,950	\$27,700	\$29,500
31-50%	\$26,100	\$29,800	\$33,550	\$37,250	\$40,250	\$43,200	\$46,200	\$49,150
51-80%	\$40,600	\$46,400	\$52,200	\$58,000	\$62,650	\$67,300	\$67,300	\$76,550

(For Units First Occupied from April 11, 2003 – June 30, 2003)

Income Level	Household Size							
	1	2	3	4	5	6	7	8 or more
0-30%	\$16,800	\$19,200	\$21,650	\$24,050	\$25,950	\$27,850	\$29,800	\$31,700
31-50%	\$28,050	\$32,050	\$36,050	\$40,050	\$43,250	\$46,450	\$49,650	\$52,850
51-80%	\$44,850	\$51,250	\$57,650	\$64,100	\$69,200	\$74,350	\$79,450	\$84,600

Maximum Rents (\$), including tenant-paid utilities (at time of initial occupancy):

<u>Unit Size</u>	<u>Effective 7/1/02</u>	<u>Effective 4/11/03</u>
SRO	614	668
O BR	819	891
1 BR	888	956
2 BR	1,068	1,149
3 BR	1,224	1,320
4 BR	1,346	1,453
5 BR	1,467	1,584

Maximum Sale Price/Appraised Value

Units occupied or rehabilitated from July 1, 2002 – December 31, 2002:

\$261,609

Units occupied or rehabilitated from January 1, 2003 – June 30, 2003:

\$280,749

Housing and Homelessness Goals and Accomplishments

	5-Year Plan (2000-2005)	FY 2002 - 03
	Goal	Goal Actual
	To Date	
Priority A: Preservation/Expansion of Supply of Affordable Housing		
Rental Housing New Constr and Substantial Rehab: Units Built	400	106
Rental Housing New Constr and Substantial Rehab: Underway		641
Scattered Site Single Family Housing Development: Units Built	100-200	119
Scattered Site Single Family Housing Development: Underway		196
Single Family Housing Acquisition/Rehabilitation: Units Built	30-60	-
Single Family Housing Acquisition/Rehabilitation: Units Underway		-
Preservation of Existing Affordable Units: Units Built	All units	191
Preservation of Existing Affordable Units: Units Underway		75
Renovation of Public Housing (HOPE VI): Units Built	n/a	-
Renovation of Public Housing (HOPE VI): Units Underway		307
Priority B: Assistance to First-Time Homebuyers		
Mortgage and Downpayment Assistance	600 assisted	175
Housing Counseling	Prepare residents	-
Mortgage Credit Certificates	Contingent on Fed Appr.	75
Priority C: Housing Rehabilitation and Neighborhood Improvement		
Owner-Occupied Housing Rehabilitation: Units Completed	600	123
Owner-Occupied Housing Rehabilitation: Units Underway		21
Rental Housing Rehabilitation: Units Completed	350	-
Rental Housing Rehabilitation: Units Underway		-
Paint Programs for Owner-Occupied Housing: Units Completed	3,000	243
Paint Programs for Owner-Occupied Housing: Units Underway		-
Minor and Emergency Home Repairs: Units Completed	1,200	731
Priority D: Rental Assistance to Extremely Low Income Families		
Tenant Based Rental Assistance	1000 new	1,008
Project Based Rental Assistance	n/a	35

EXHIBIT B

	5-Year Plan (2000-2005)		FY 2002 - 03	
	Goal	To Date	Goal	Actual
Priority E: Prevention and Reduction of Homelessness				
Outreach and Information Referral		5,518	2,000	5,000
Homeless Mobile Outreach Program	10,000 people	1,742	3,000	-
Health Care for Homeless	15,000 people	286	3,000	286
Other Outreach Services	15,000 people	1,340	3,000	1,340
Information and Referral Services	15,000 people			
Emergency Shelters and Services		26,971	2,100	6,039
Existing Year-Round Emergency Shelter System	10500 People	21,967	11,921	5,945
Winter Shelter	59605 people	4,257	400	1,973
Emergency Shelter Hotel/Motel Voucher Program	2,000 people			
Transitional Housing				
Existing Transitional Housing Facilities	440 families	501	137	137
Transitional Housing Jobs Campus at Oakland Army Base	Build jobs campus for 50 people	-	11-19	-
Supportive Services Program	900 units supp. Housing	763	150-170	523
Homeless Prevention				
Rental Assistance		906	86	131
Eviction Prevention	430 individuals/families	363	70	-
Legal Assistance	350 individuals/families	3,463	790	1,440
Housing Counseling	3,505 cases	4,781	670	1,992
Tenant Education Program	3,300 cases	500	60	-
Linked HIV/AIDS	275 cases			
Service-Rich Housing for PLWAA and Families	55 people	51	11	20
Services and Referral	1,500 people	2,185	300	1,340
Permanent Housing	46 units of housing	138	9	40
Priority F: Housing For Seniors and Persons with Disabilities				
Housing Development: Units Built	150	275	-	82
Housing Development: Units Underway		154		
Access to Government: Units Completed		34	10	11
Access to Government: Units Underway		11		
Priority G: Community Housing				
Referral, Information, and Counseling to Residents w/Disabilities	n/a	2,147	-	1,073
Referral, Information, and Counseling to Residents w/Disabilities	n/a	9,619	-	2,776
Referral, Information, and Counseling to Families w/Children	n/a	1,138	-	713

ECONOMIC DEVELOPMENT

9 2003

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