



## HOUSING BEST PRACTICES TOOLKIT

Project	<b>TRiO Plus</b>		
Contact name-mob-email	<b>Chan U Lee, Board Chair, 510.925.3994, chanu@trioplus.org</b>		
City, State	Oakland, Ca		
Partners	Oakland Unified School District, Community Development		
Funding Timeframe	9 years	\$7M is for a 9-year program; so ±\$750K per year. A 2-year pilot for housing 100 teachers, some who are refugees/immigrants, will cost ≈\$1.5M paid with a combination of private philanthropy and public funding.	
Total Funding	\$7M+		
Funders	<b>See below</b>		
Funding details	Funder	Type: grant, loan, donation, in-kind	Amount   Value
<b>Government</b>	<b>State of California</b>	<b>Grant</b>	<b>\$5M</b>
<b>Corporation</b>	<b>Bank of America</b>	<b>Grant</b>	<b>\$2M</b>
<b>Foundation</b>	<b>Akonadi Foundation</b>	<b>Grant</b>	<b>\$600k</b>

### 1. Project Summary | Please describe your innovative housing initiative in ±50 word):

TRiO Plus’ innovation reduces housing unit costs for the community’s most valuable and underpaid workforce - public school educators. It also to creates units in markedly less time than it takes to complete traditional affordable housing projects. TRiO improves teachers' experience with an easy-to-navigate affordable housing marketplace and with supports like guarantees for those with low credit; low-interest security deposit loans for those who cannot afford upfront costs, and free financial coaching to all who want it. There is real opportunity to intentionally support refugees to become OUSD employees and to provide affordable housing support to serve their communities.

### 2. Implementing Organization / Group | Please share information about the organization

TRiO Plus is a nonprofit organization whose aim is to confront educational inequity by securing housing that is more affordable for all Oakland teachers -- but especially Black, Latine, and other teachers of color -- so our kids stop paying the price for our broken housing system.

### 3. Specific Housing Challenge (problem statement) | Analysis

#### a. Affordable housing situation in your location (town, suburb, city | (±50 words):

A single unit of affordable housing in the Bay Area costs \$1M+ to build. This figure is not only a microcosm of CA’s housing crisis but paints a bleak picture for any effort to reduce housing costs for those already rent-burdened, including 60%+ of OUSD teachers: 20% spend 50%+ of income on rent and teachers of color are disproportionately represented in the latter group. Consistently, the #1 reason teachers cite when leaving OUSD is that they cannot afford to live here.



b. Average time to find, secure, and prepare safe, affordable housing for move-in:  
 Our lease-up period to-date from when a teacher makes an inquiry to when a lease is signed is an average of 12 days.

- c. Average rents
- o 2-bedroom apartment, townhouse, etc.: \$2,200 with negotiated concessions
  - o 3-bedroom apartment, townhouse, etc.: \$2,700 with negotiated concessions; hard to find
  - o Other

4. How did you go from project ideation to implementation, i.e., what were your top line decision points leading to an actionable plan?

Decision Points	Steps (research, meetings, negotiations, etc.)	People involved
1. Landscape Analysis	a. Meet with OUSD to understand and identify problem	<ul style="list-style-type: none"> <li>• Devine and Gong: Consultants, Chan U Lee, CEO of DGI as Co-Founder; <a href="http://devinegong.com">Devine and Gong (devinegong.com)</a></li> <li>• Oakland Mayor's Office</li> <li>• Oakland Unified School District</li> </ul>
	b. Receive/analyze data	
	c. See that housing & affordability are #1 cited reasons for why teachers need to leave	
2. Stipend Pilot	a. Develop a logic model and theory of action	2. & 3:  <ul style="list-style-type: none"> <li>• Devine and Gong</li> <li>• Oakland Mayor's Office</li> <li>• Community Development Finance</li> <li>• OUSD</li> <li>• 2B Living</li> <li>• Funding Partners</li> <li>• Oakland City Council</li> <li>• Oakland School Board</li> <li>• Others</li> </ul>
	b. Identify specific programming to test pilot program	
	c. Execute pilot program to offer subsidized housing and/or housing stipends for teacher residents	
3. Affordable Housing Marketplace	a. Saw that stipends / subsidies were helpful, many teacher residents needed support navigating housing search.	2. & 3:  <ul style="list-style-type: none"> <li>• Devine and Gong</li> <li>• Oakland Mayor's Office</li> <li>• Community Development Finance</li> <li>• OUSD</li> <li>• 2B Living</li> <li>• Funding Partners</li> <li>• Oakland City Council</li> <li>• Oakland School Board</li> <li>• Others</li> </ul>
	b. Additionally, saw that more teachers than just teacher residents needed support.	
	c. Launch affordable housing marketplace for all OUSD teachers to access discounted rental units.	
4. Bolting on Additional Services & Expand to Serve More	a. Saw that teachers furthest from opportunity were not able to access units for a number of reasons	<ul style="list-style-type: none"> <li>• Community Development Finance</li> <li>• <a href="http://HoneyBee.org">HoneyBee</a> (financial counseling and planning)</li> <li>• Others</li> </ul>
	b. Add innovations around institutional guarantees and security deposit financing, as well as financial wellness/coaching services	
	c. Expand to serve all OUSD employees (not just teachers)	



5. Resources needed and steps to acquire each (expand table as needed)

Resources, e.g., property to buy or rent, materials and workers to renovate	Steps to secure and accomplish each
1. Property to rent at discounted rate	a. identify potential housing partners
	b. negotiate discounted rents with long-term, civic minded housing providers who support good schools; DGI & other partners provide leads; beyond the good will of housing providers, TRiO Plus adds value by offering shorter-than-market lease-up periods, plus lease guarantees for low credit scores and security deposit financing
2. Money for stipends, technology build out of affordable housing marketplace, ops / overhead	a. identify potential donors
	b. cultivate and solicit
3. High quality team to execute	a. identify skills, experience was needed
	b. recruit across relevant networks

6. Did you create standard operating procedures (SOP) that others could follow?  
**SOP document in process.**

7. Outcome(s)

Outcome(s), e.g., an innovation to secure or create affordable housing and a plan/template to share; safe housing for # more newcomers; new stakeholders to help secure housing
1. A scalable, replicable innovation to provide more affordable housing to underpaid public service workers
2. A new technology to help make the housing search process easier and more enjoyable.
3. Investors from multiple sectors who have a stake in the initiative.
4. In our first two years, just the stipend program helped the school district 3x the number of teacher residents and 3.6x the number of teacher residents of color

8. Stakeholders |

Stakeholder	Role(s) in the project and/or all local housing programs
Oakland United School District (OUSD)	Employer of educators being supported
City of Oakland	Local government partner
Non-profits	Community Development Finance = fiscal partner/sponsor
Funders	Provide capital to ensure goals are met

9. Evaluation | How did you assess the project's effectiveness, and what were Lessons Learned for improvement, replication, etc.?



We aim to partner with an external evaluator, but for now we track data and measure success internally through a number of metrics from educators served, housing supply acquired, lease-up period, recruitment and retention rates for teachers, and more.