

SAHA
SAN ANTONIO
HOUSING AUTHORITY
Opportunity Lives Here



MOVING TO WORK REPORT

Fiscal Year 2020-2021

per HUD FORM 50900 (OMB Control Number: 2577-0216)

Submitted to HUD for approval: September 30, 2021
Approved by HUD:

MESSAGE FROM PRESIDENT AND CEO

Since 2009, the San Antonio Housing Authority (SAHA) has had the privilege to operate with a Moving-to-Work designation — exploring new programs, revisiting processes and policies for housing assistance programs and creating solutions that best give families in San Antonio a chance to succeed.

As our families maneuver the repercussions of the COVID-19 pandemic, we will continue to support them by providing higher quality social supportive services and leveraging available community resources.

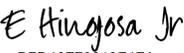
We have ambitious plans for 2021 as we prepare to launch a JobsPlus Program at Lincoln Heights to focus on connecting residents to workforce training, employment opportunities and higher education. Through this program, we have seen single mothers with no income take a chance on themselves by enrolling in a free skills training program, completing courses with honors and attaining a certification with potential.

Through the flexibility of the MTW designation, we have the unique opportunity to offer our residents one-on-one case management and watch them accomplish their dreams.

We look forward to expanding our SAHA Road-to-Digital Inclusion initiative by providing residents residing in public housing communities access to free Wi-Fi. From their homes, they will have access to the internet, to engage in commerce and seek medical and job assistance. This initiative removes another expense often considered a burden to low-income families, but is also a necessity in 2021 and the future.

The challenges of 2020 — including the pandemic, the unemployment crisis, and the housing crisis — has made it clear our organization must refocus our initiatives to better serve the greater community. All our families have faced unique challenges and share a quality of perseverance, and how we assist each of them will differ.

As President and CEO, I am honored to represent more than 20,000 families — almost 60,000 residents — as SAHA begins shifting its services, and operations to leverage a robust collaborative effort with partners and other community organizations with a focus on improving the lives of all our residents.

DocuSigned by:

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9/29/2021

Ed Hinojosa, Jr.

President and CEO

San Antonio Housing Authority

Fiscal Year 2019: *July 1, 2020 to June 30, 2021*

SAHA Board of Commissioners

Dr. Ana Margarita “CHA” Guzman, Chair
Loren Dantzer
Olga Kauffman
Gabriel Lopez
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Gilbert Casillas
Ignacio Perez

SAHA Executive Staff

Ed Hinojosa, President and Chief Executive Officer
Timothy Alcott, Development and Neighborhood Revitalization Officer
Brandee Perez, Chief Operating Officer
Muriel Rhoder, Chief Administrative Officer

SAHA Senior Staff

Jo Ana Alvarado, Director of Innovative Technology
Kristi Baird, Director of Beacon Communities
Diana Kollodziej Fiedler, Director of Finance and Accounting
Domingo Ibarra, Director of Security
Aiyana Longoria, Director of Internal Audit
Hector Martinez, Director of Construction Services and Sustainability
Richard L. Milk, Director of Policy and Planning
George Ayala, Director of Procurement and General Services
Michael Reyes, Director of Communications and Public Affairs
Lorraine Robles, Director of Development Services and Neighborhood Revitalization
Janie Rodriguez, Director of Human Resources
Thomas R. Roth, Director of Asset Management
Joel Tabar, Director of Community Development Initiatives
Zachariah Woodard, Director of Federal Housing Programs

MTW Contacts

Richard L. Milk, Director of Policy and Planning
Sara Eaves, Policy & Planning Manager

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Overview

The San Antonio Housing Authority (SAHA) provides housing to over 65,000 children, adults, and seniors through four housing portfolios – Public Housing, Housing Choice Vouchers, and Mixed-Income housing programs. SAHA employs approximately 525 people and has an annual operating budget of \$176 million. Existing real estate assets are valued at over \$500 million.

SAHA's involvement with Moving to Work (MTW) dates back to May 2000, when SAHA implemented its initial MTW demonstration program in three Public Housing communities: Mission Park Apartments, Wheatley Courts, and Lincoln Heights Courts. In 2009, SAHA signed an amended and restated agreement with the U.S. Department of Housing and Urban Development (HUD) to make the MTW demonstration an agency-wide program.

The MTW designation provides SAHA with the flexibility to design and test innovative approaches to enhance the Agency's programs. The MTW designation also provides funding flexibility by combining Public Housing operating subsidies, Capital Fund Program (CFP) grants, and Housing Choice Voucher (HCV) program subsidies into a single fund block grant.

The following section provides an overview of SAHA's short-term accomplishments and summarizes the Agency's progress towards long-term goals and objectives.

Short-term Accomplishments

Progress towards long-term goals and objectives

Update on SAHA's long-term planning

Alignment of MTW Plan and Strategic Plan

During FY2020, SAHA developed its FY2021 one-year MTW Plan as an integral component of a five-year Strategic Plan. The new format is the result of a deliberate effort to more closely align the agency's various planning efforts. The annual MTW Plan is now documented as an appendix to the Agency's five-year strategic plan. Appendices A through E comprise the entirety of the 50900 requirements.

SAHA STRATEGIC PLAN

The Strategic Plan describes the agency's priorities for the next five years. It also describes how those priorities connect to a shared understanding of the environment in which the agency works (theory of change), the impact of the agency's work on the broader community, questions that are critical to research, and annual implementation strategies.

GUIDING PRINCIPLES AND STATEMENTS

- **Vision:** Create dynamic communities where people thrive.
- **Mission:** The San Antonio Housing Authority Provides quality affordable housing that is well integrated into the fabric of neighborhoods and serves as a foundation to improve lives and advance resident independence.



- **Impact Statement:** San Antonio Area has a high quality of life where all are thriving
- **Values:** The agency is currently developing a set of core values.

LONG-TERM OUTCOMES

The strategic plan focuses on priority outcomes for two key populations, SAHA Residents and SAHA Staff. Six outcomes have been identified as high priorities:

Two Staff-focused outcomes

- SAHA staff respect and value diversity and inclusion
- SAHA staff thrive in career and professional work

Four Resident-focused outcomes

- SAHA residents have a sufficient supply of affordable housing options
- SAHA residents live in quality housing
- SAHA residents feel safe
- SAHA residents have access to sufficient utilities

In FY2021, baselines, targets, and strategies were developed for the key strategic plan outcomes. In September and October, resident and stakeholder work groups were convened for ten focus group meetings regarding the strategies proposed for each outcome. The feedback from these small groups was then supplemented with a comprehensive online survey in October and November that included questions about both barriers and strategies related to the key outcomes. In January of 2021, SAHA hosted a Virtual Symposium with community stakeholders and potential partners to identify opportunities in the strategic plan to address the housing crisis and develop innovative solutions. One of the ideas that the 25 panelists and nearly 400 attendees discussed was "Housing is a Human Right". In April 2021, a second survey was administered by phone, mail, and flyers to include residents without email addresses. Each of these engagement efforts generated significant feedback, both confirming and challenging elements of the plan. The responses to the October and April surveys together form baselines for the strategic plan outcomes from which future progress will be evaluated.

The strategic plan is being updated through a process that will periodically assess the following plan elements in light of new information:

1. Theory of Change
2. Guiding Statements (Vision, Mission, Impact)
3. Navigation: Outcomes, Indicators, Targets, Strategies
4. Impact: Neighborhood, Local Economy, Social
5. Performance Monitoring: Operational, Financial, Resident

Featured Success Stories

This year the Agency is honored to share a few of the many success stories from families we have been able to support through a combination of our Family Self-Sufficiency Program and Moving to Work investments.



ANGELA

Ms. Angela relocated to San Antonio from New Orleans and immediately enrolled in SAHA's FSS program. She set several goals for herself and worked quickly to accomplish them all. She completed ConnectHome training, worked to increase her credit score, obtained her high school diploma, and worked to increase her hours from part time to full. She graduated from the FSS program this year and is currently working toward home ownership.

SARAH

Ms. Sarah is a single mother who is enrolled in SAHA's FSS program. She set out several education goals for herself and is well on her way toward accomplishing them all. She recently received her high school diploma from the South Texas Leadership Center and is currently working toward a degree at San Antonio college. While she has been working on her education, she has also been diligently working part time and taking care of her children. In addition, she is also involved in her community and has accepted a nomination to serve on her Resident Council Board.

MELONY

Ms. Melony is a single mother of two, who participates in FSS and in the Endowment program. It was through her work in these programs that Melony learned about HPOG. In November, 2020, in the midst of a worldwide pandemic, Melony enrolled in the HPOG Pharmacy Technician Program. Despite the insurmountable obstacles faced throughout the program, Melony never gave up on her dream of providing a better life for her children. Melony persevered and completed her training courses successfully. She has since passed her National Healthcareer Association Pharmacy Technician Certification Exam and will be graduating as a Certified Pharmacy Technician in September 2021.



II. General Housing Authority Operating Information

A. Housing Stock Information

i. Actual New Project Based Vouchers

Tenant-based vouchers that the MTW PHA project-based for the first time during the Plan Year. These include only those in which at least an Agreement to enter into a Housing Assistance Payment (HAP) was in place by the end of the Plan Year. Indicate whether the unit is included in the Rental Assistance Demonstration (RAD).

| PROPERTY NAME | NUMBER OF VOUCHERS NEWLY PROJECT-BASED | | STATUS AT END OF PLAN YEAR** | RAD? | DESCRIPTION OF PROJECT |
|-------------------------|--|--------|--|------|---|
| | Planned* | Actual | | | |
| 100 Labor (Name TBD) | 44 | 44 | Committed/ Pending Approvals and Financing | No | 100 Labor, an approximately 213-unit multifamily project, is located at 100 Labor Street. The project is expected to cost approximately \$54,599,095. This project is planned to receive gap financing through the Agency's Moving to Work funding flexibility. |
| St. John's Square | 50 | 50 | Committed/ Pending Approvals and Financing | No | New downtown development - supports Time-limited Workforce Pilot Program (FY20-4 Activity) |

| | | |
|----|----|---|
| 44 | 94 | Planned/Actual Total Vouchers Newly Project-Based |
|----|----|---|

* Figures in the "Planned" column should match the corresponding Annual MTW Plan.

** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

Please describe differences between the Planned and Actual Number of Vouchers Newly Project-Based:

Both projects have been delayed. The PBV HAP contracts have not been executed but the Agency has planned to commit the PBVs as part of the new development financing.

ii. Actual Existing Project Based Vouchers

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least a HAP was in place by the beginning of the Plan Year. Indicate whether the unit is included in RAD.

| PROPERTY NAME | NUMBER OF | STATUS AT END | RAD? | DESCRIPTION OF PROJECT |
|---------------|-----------|---------------|------|------------------------|
|---------------|-----------|---------------|------|------------------------|



| | PROJECT-BASED VOUCHERS | | OF PLAN YEAR** | | |
|-----------------------------|------------------------|--------|----------------|----|--|
| | Planned* | Actual | | | |
| Gardens at San Juan | 31 | 31 | Leased/ Issued | No | Mixed-income Community |
| East Meadows | 8 | 8 | Leased/ Issued | No | Phase I of Wheatley Courts Redevelopment/Phase 2 of Choice Grant |
| Wheatley Park Senior Living | 36 | 36 | Leased/ Issued | No | 80 Unit Senior Development: Phase 2 of Wheatley Courts Redevelopment/Phase 3 of Choice Grant |
| Woodhill | 10 | 10 | Leased/ Issued | No | Beacon Community - supports Next Step Housing Program (FY21-1 Activity) |
| Rosemont at Highland Park | 20 | 20 | Leased/ Issued | No | Beacon Community - supports Family Homeless Referral Program (FY15-3 Activity) |

| | | |
|------------|------------|---|
| 105 | 105 | Planned/Actual Total Vouchers Newly Project-Based |
|------------|------------|---|

* Figures in the "Planned" column should match the corresponding Annual MTW Plan.

** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

Please describe differences between the Planned and Actual Number of Vouchers Project-Based:

The 50 units committed to St. John's Square were reported in this section in the FY2021 Plan. The development has been approved by the Agency's Board of Commissioners and is pending final financing and construction. These PBVs were moved back up to section II.A.i. Actual New Project Based Vouchers.

iii. Actual Other Changes to MTW Housing Stock in the Plan Year

Examples of the types of other changes can include (but are not limited to): units held off-line due to relocation or substantial rehabilitation, local, non-traditional units to be acquired/developed, etc.

| ACTUAL OTHER CHANGES TO MTW HOUSING STOCK IN PLAN YEAR |
|--|
| <p>FY2021 Actual Changes</p> <p>Housing Choice Voucher Program: no changes; the Agency maintains 12,240 vouchers</p> <p>Public Housing Units: Net of -26 units (27 units were removed and 1 unit added)</p> <ul style="list-style-type: none"> Blue Ridge/vf/sf/palm Lake (TX006000036): 20 units removed (9 units at Sun Flower and 11 units at Palm Lake) Springview (TX006000031 [Building B, C, Replacement Home]): 7 units removed; Note: The Agency planned to remove 32 units; however, the other units are anticipated to be removed in the coming fiscal year. Wheatley Senior Living (TX006000059): 1 unit added; Note: This addition is the result of the conversion of 1 unit to PH at a newly constructed development. <p>Note: LIPH Victoria Plaza, 185 units - remain offline with status of HUD Approved Comprehensive Rehab</p> |



iv. General Description of All Actual Capital Expenditures During the Plan Year

Narrative general description of all actual capital expenditures of MTW funds during the Plan Year.

| GENERAL DESCRIPTION OF ALL ACTUAL CAPITAL EXPENDITURES DURING THE PLAN YEAR | | | | | | |
|--|------------------|-------------------------|-------------------------|-------------------------|-------------------------|------------|
| Grant | Grant Amount | FYE Cumulative Expended | FYE Cumulative Expended | Expended During FY2021 | Remaining To Expend | % Expended |
| 2018 CFP | \$ 12,332,100.00 | \$ 10,838,251.00 | \$ 12,332,100.00 | \$ 1,493,849.00 | \$ - | 100.00% |
| 2019 CFP | \$ 12,929,611.00 | \$ 4,196,222.64 | \$ 11,718,421.11 | \$ 7,522,198.47 | \$ 1,211,189.89 | 90.63% |
| 2020 CFP | \$ 13,046,754.00 | \$ - | \$ 4,406,910.27 | \$ 4,406,910.27 | \$ 8,639,843.73 | 33.78% |
| 2021 CFP | \$ 13,184,301.00 | \$ - | \$ - | \$ - | \$ 13,184,301.00 | 0.00% |
| | | TOTAL FY21 | \$ 28,457,431.38 | \$ 13,422,957.74 | \$ 23,035,334.62 | |

| Property | Description |
|-----------------|---|
| Alazan Apache | Rehabilitation of Fire Damaged Unit (919 Chihuahua) |
| Blanco | Phase III - Add'l Design Professional Services |
| Blanco | Emergency Air Cooled Chiller Compressor |
| Blanco | Basement Structural Repair |
| Cassiano | Burn Units Rehabilitation (8 units) |
| Charles Andrews | Construction Materials Observation-Testing |
| Charles Andrews | Int/Ext/Site Improvement Cap Project (Subst Rehab) |
| College Park | Elevator Repair and Replacement |
| Cross Creek | Fire Rebuild Unit #704 |
| Fair Avenue | Schedule 13 - Add'l Construction Administration Services |
| Fair Avenue | Fire Sprinkler and Alarm Design |
| Fair Avenue | Fire Protection Improvements (Sprinkler-Alarm) |
| Fair Avenue | Asbestos Abatement for Fire Protection Improvements |
| Fair Avenue | Raceway Antenna System and Elevator Breezeway |
| Fair Avenue | Fire Alarm Relay/Shunt Breaker |
| Highview | Drainage Improvements Project Professional Engineering Services (Feasibility Study) |
| LC Rutledge | Roof Replacement |
| Le Chalet | Replace Water Heater & Gas Rod |
| Lincoln | Connect Home - Computer Lab |
| Madonna | Natural Gas System-Boiler Rm Feasibility Study |
| PHA Wide | Operations 1406 |



| | |
|-------------------------|---|
| PHA Wide | Administration 1410 |
| PHA Wide | CFFP Debt Service |
| PHA Wide | CFP Project Manager/Inspector Salaries |
| PHA Wide | Environmental Reviews |
| PHA Wide | Physical Needs Assessment |
| Parkview | Roof Replacement |
| Parkview | Amendment 10 - Elevator Repairs |
| San Pedro Arms | Boiler Replacement |
| T.L. Shaley | Burn Unit Duplex Reconstruction |
| T.L. Shaley | Unit Conversion - 829 Rita |
| Victoria Plaza | Add'l Architectural Services - Addendum #2 |
| Victoria Plaza | Mold Assessment and Remediation Unit #503 |
| Victoria Plaza | Comprehensive Modernization |
| Victoria Plaza | CPS - New Permanent Power Installation |
| Victoria Plaza | Basement Waste Piping and Repair |
| Victoria Plaza | Elevator Modernization |
| Victoria Plaza | Asbestos Abatement - Windows |
| Victoria Plaza | Asbestos LCP Consulting |
| Victoria Plaza | Purchase and Installation of Cabinets |
| Victoria Plaza | Emergency Gas Line Replacement |
| Victoria Plaza | Plumbing Services - Underground Leak |
| Villa Hermosa | MEP and Fire Protection Feasibility Study |
| Villa Hermosa | Purchase Equipment Chiller |
| Villa Hermosa | Chiller Installation |
| Villa Tranchese | HVAC, Fire Sprinkler, Basement Assessment |
| Villa Tranchese | Fire Protection Improvements (Sprinkler-Alarm) |
| Villa Tranchese | Asbestos Consulting Chiller Renovation Sched. #52 |
| Villa Tranchese | Asbestos Lead Paint Inspection and Consultation |
| Villa Tranchese | Common Area HVAC Chiller Replacement |
| Wheatley Park Sr Living | DDTF - Project Manager/Inspector Salaries |

B. Leasing Information

i. Actual Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA actually served at the end of the Plan Year.

| NUMBER OF HOUSEHOLDS SERVED THROUGH: | NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | | NUMBER OF HOUSEHOLDS SERVED** | |
|--------------------------------------|--|--------|-------------------------------|--------|
| | Planned^^ | Actual | Planned^^ | Actual |



| | | | | |
|--|---------|---------|--------|--------|
| MTW Public Housing Units Leased | 68,772 | 66,960 | 5,731 | 5,580 |
| MTW Housing Choice Vouchers (HCV) Utilized | 147,708 | 140,616 | 12,309 | 11,718 |
| Local, Non-Traditional: Tenant-Based | NA | NA | NA | NA |
| Local, Non-Traditional: Property-Based | 2,532 | 3,264 | 211 | 272 |
| Local, Non-Traditional: Homeownership | NA | NA | NA | NA |

| | | | | |
|------------------------------|---------|---------|--------|--------|
| Planned/Actual Totals | 219,012 | 210,840 | 18,251 | 17,570 |
|------------------------------|---------|---------|--------|--------|

* “Planned Number of Unit Months Occupied/Leased” is the total number of months the MTW PHA planned to have leased/occupied in each category throughout the full Plan Year (as shown in the Annual MTW Plan).

** “Planned Number of Households to be Served” is calculated by dividing the “Planned Number of Unit Months Occupied/Leased” by the number of months in the Plan Year (as shown in the Annual MTW Plan).

^^ Figures and text in the “Planned” column should match the corresponding Annual MTW Plan.

Please describe differences between the Planned and Actual Households Served:

PH: Victoria Plaza (185 units/2,220 unit months) remains offline for comprehensive modernization. 15 Units are in the Agency category (204 unit months). There were 5,739 units in approved HUD status, and 5,594 were occupied by a tenant. The Agency had 63 unit months corresponding to Vacant HUD Approved - Vacant Demo/Dispo Approved. Also the agency originally planned to sell 69 scattered site homes but plans were changed and lease up and make readies were needed to bring offline units back to leasable status.

Vouchers: The program utilization in FY2021 was below the planned utilization and below the Agency’s baseline of 12,240.

LNT: The Agency served more than expected in this portfolio as the result of a new property being added to this category. See FY2011-1e for more information.

| LOCAL, NON-TRADITIONAL CATEGORY | MTW ACTIVITY NAME/NUMBER | NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | | NUMBER OF HOUSEHOLDS TO BE SERVED* | |
|---------------------------------|--|--|--------|------------------------------------|--------|
| | | Planned^^ | Actual | Planned^^ | Actual |
| Tenant-Based | NA | NA | NA | NA | NA |
| Property-Based | FY2011-1e Preservation and Expansion of Affordable Housing | 2,532 | 3,167 | 211 | 272 |
| Homeownership | NA | NA | NA | NA | NA |

| | | | | |
|------------------------------|-------|-------|-----|-----|
| Planned/Actual Totals | 2,532 | 3,264 | 211 | 272 |
|------------------------------|-------|-------|-----|-----|

* The sum of the figures provided should match the totals provided for each Local, Non-Traditional category in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

^^ Figures and text in the “Planned” column should match the corresponding Annual MTW Plan.

| HOUSEHOLDS RECEIVING LOCAL, NON-TRADITIONAL SERVICES ONLY | AVERAGE NUMBER OF HOUSEHOLDS PER MONTH | TOTAL NUMBER OF HOUSEHOLDS IN THE PLAN YEAR |
|---|--|---|
| NA | NA | NA |



ii. Discussion of Any Actual Issues/Solutions Related to Leasing

Discussion of any actual issues and solutions utilized in the MTW housing programs listed.

| HOUSING PROGRAM | DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS |
|-----------------------------------|---|
| MTW Public Housing | On March 16, 2020 the agency suspended all eligibility appointments and move-ins for PH to reduce the spread of COVID. July 1, 2020 a modified move in process was finalized and lease up restarted but in reduced numbers to ensure protocols were followed. Make Ready Supplies also resulted in slower timeframes for occupancy as many supplies were out of stock or had limited supply (wood, metal, foam, fridges, etc). Staffing was also affected due to covid cases on the rise. |
| MTW Housing Choice Voucher | The Agency's voucher program is facing challenges related to ongoing modified operations as a result of the pandemic, temporary impacts of the Winter Storm Uri, and challenges facing residents during their lease-up process. The Agency is currently focusing resources on increasing processing of RTAs, issuing new vouchers, working with partners to coordinate existing assistance for residents during their housing search, coordinating with the city to assist residents in accessing emergency rental assistance to reduce terminations. |
| Local, Non-Traditional | None. |

C. Waiting List Information**i. Actual Waiting List Information**

Snapshot information on the actual status of MTW waiting lists at the end of the Plan Year. The "Description" column should detail the structure of the waiting list and the population(s) served.

| WAITING LIST NAME | DESCRIPTION | NUMBER OF HOUSEHOLDS ON WAITING LIST | WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED | WAS THE WAITING LIST OPENED DURING THE PLAN YEAR |
|---|-------------------------|--------------------------------------|---|--|
| Federal MTW Public Housing Units | Site-based | 43,732 | Open | No |
| Federal MTW Housing Choice Voucher Program | Community-wide | 4,616 | Closed | No |
| Federal Non-MTW Housing Choice Voucher Program: Moderate Rehabilitation | Moderate Rehabilitation | 46,141 | Open | No |
| Project-based Local (Gardens at San Juan Square) | Local Project-Based | 38,612 | Open | No |
| Project-based Local (East Meadows Phase I) | Local Project-Based | 17,991 | Open | No |
| Project-based Local (Wheatley Park Senior Living) | Local Project-Based | 537 | Open | No |



Please describe any duplication of applicants across waiting lists:

Currently the total number of households on the waiting lists is 47,301 with the average household applying for 2 or more waiting lists.

ii. Actual Changes to Waiting List in the Plan Year

Please describe any actual changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list, during the Plan Year.

| WAITING LIST NAME | DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST |
|---|---|
| Federal MTW Public Housing Units | None |
| Federal MTW Housing Choice Voucher Program | None |
| Federal Non-MTW Housing Choice Voucher Program: Moderate Rehabilitation | None |
| Project-based Local (Gardens at San Juan Square) | None |
| Project-based Local (East Meadows Phase I) | None |
| Wheatley Park Senior Living PBV | None |

D. Information on Statutory Objectives and Requirements**i. 75% of Families Assisted Are Very Low Income**

HUD will verify compliance with the statutory requirement that at least 75% of the households assisted by the MTW PHA are very low income for MTW public housing units and MTW HCVs through HUD systems. The MTW PHA should provide data for the actual families housed upon admission during the PHA's Plan Year reported in the "Local, Non-Traditional: Tenant-Based"; "Local, Non-Traditional: Property-Based"; and "Local, Non-Traditional: Homeownership" categories. Do not include households reported in the "Local, Non-Traditional Services Only" category.

| INCOME LEVEL | NUMBER OF LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED IN THE PLAN YEAR |
|-------------------------------------|---|
| 80%-50% Area Median Income | 44 |
| 49%-30% Area Median Income | 59 |
| Below 30% Area Median Income | 5 |

Total Local, Non-Traditional Households Admitted 108



ii. Maintain Comparable Mix

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served by the MTW PHA prior to entry into the MTW demonstration (or the closest date with available data) and compare that to the current mix of family sizes served during the Plan Year.

| BASELINE MIX OF FAMILY SIZES SERVED (upon entry to MTW) | | | | | |
|---|-------------------------------|---------------|----------------------|---------------------|-------------------------|
| FAMILY SIZE | OCCUPIED PUBLIC HOUSING UNITS | UTILIZED HCVs | NON-MTW ADJUSTMENTS* | BASELINE MIX NUMBER | BASELINE MIX PERCENTAGE |
| 1 Person | 2,617 | 3,952 | NA | 6,569 | 36% |
| 2 Person | 873 | 2,134 | NA | 3,007 | 16% |
| 3 Person | 998 | 2,338 | NA | 3,336 | 18% |
| 4 Person | 730 | 2,004 | NA | 2,734 | 15% |
| 5 Person | 401 | 1,178 | NA | 1,579 | 9% |
| 6+ Person | 317 | 917 | NA | 1,234 | 7% |
| TOTAL | 5,936 | 12,523 | NA | 18,459 | 100% |

* "Non-MTW Adjustments" are defined as factors that are outside the control of the MTW PHA. An example of an acceptable "Non-MTW Adjustment" would include demographic changes in the community's overall population. If the MTW PHA includes "Non-MTW Adjustments," a thorough justification, including information substantiating the numbers given, should be included below.

Please describe justification for any "Non-MTW Adjustments" given above:

There are no non-MTW Adjustments to the distribution of household sizes. Baseline percentages of household sizes to be maintained were established using the most complete historical dataset that included household size. The reported data in the Agency's FY 2011-2012 report for FY2011-1e Activity was used to set the baseline-- this is a snapshot of occupancy as of June 30, 2012.

| MIX OF FAMILY SIZES SERVED (in Plan Year) | | | | |
|---|---------------------------|---|--|---|
| FAMILY SIZE | BASELINE MIX PERCENTAGE** | NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR^ | PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^ | PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR |
| 1 Person | 36% | 6,847 | 39% | 8% |
| 2 Person | 16% | 3,157 | 18% | 12% |
| 3 Person | 18% | 2,820 | 16% | -11% |
| 4 Person | 15% | 2,303 | 13% | -13% |
| 5 Person | 9% | 1,355 | 8% | -14% |
| 6+ Person | 7% | 1,088 | 6% | -12% |
| TOTAL | 100% | 17,570 | 100% | NA |

** The "Baseline Mix Percentage" figures given in the "Mix of Family Sizes Served (in Plan Year)" table should match those in the column of the same name in the "Baseline Mix of Family Sizes Served (upon entry to MTW)" table.

^ The "Total" in the "Number of Households Served in Plan Year" column should match the "Actual Total" box in the "Actual Number of Households Served in the Plan Year" table in Section II.B.i of this Annual MTW Report.

^^ The percentages in this column should be calculated by dividing the number in the prior column for each family size by the "Total" number of households served in the Plan Year. These percentages will reflect adjustment to the mix of



families served that are due to the decisions of the MTW PHA. Justification of percentages in the current Plan Year that vary by more than 5% from the Baseline Year must be provided below.

Please describe the justification for any variances of more than 5% between the Plan Year and Baseline Year:

- (1) **Demographic Change:** The city of San Antonio continues to see significant demographic change that justifies the variation. First, there has been an increase in the proportion of the population aged 62 years and older and a decrease in the proportion of its population under 18 years old. Second, the city has seen a decrease in the proportion of households and families below the poverty level who have children. Both of these demographic shifts are consistent with the increase in one- and two-person households and the decrease in three-plus person households. These shifts in demographics are also evident among households served by SAHA through MTW.

| San Antonio city, Texas | | | | | |
|-------------------------|-------------------|------------------------|------------------------|-----------------------------|-------------------|
| | | 2014-2018 Estimates | 2009-2013 Estimates | Statistical Significance | Percent Change |
| Population | Under 18 years | 25.30% | 26.40% | Yes | -4% |
| | 62 years and over | 11.80% | 10.80% | Yes | 9% |

Source: American Community Survey Comparative Demographic Estimates (CP05); 2018 and 2013 Five-Year Estimates

| San Antonio city, Texas | | | | | |
|---|---|------------------------|------------------------|-----------------------------|-------------------|
| | | 2014-2018 Estimates | 2009-2013 Estimates | Statistical Significance | Percent Change |
| Households by Type | Households with one or more people under 18 years | 34.3% | 37% | Yes | -7% |
| Percentage of families and people whose income in the past 12 months is below the poverty level | With related children of the householder under 18 years | 21.5% | 23% | Yes | -7% |

Source: American Community Survey Comparative Social Estimates (CP02) and Comparative Economic Estimates (CP03); 2018 and 2013 Five-Year Estimates

- (2) **Housing Market Change:** The city of San Antonio continues to see shifts in the proportion of housing units with no bedrooms and one bedrooms while also experiencing a decrease in the proportion of units with three bedrooms.

| San Antonio city, Texas | | | | | |
|-------------------------|---------------------|------------------------|------------------------|-----------------------------|-------------------|
| | | 2014-2018 Estimates | 2009-2013 Estimates | Statistical Significance | Percent Change |
| Bedrooms | Total housing units | 543,762 | 528,607 | Yes | 3% |
| | No bedroom | 2.9 | 2.5 | Yes | 16% |
| | 1 bedroom | 16.8 | 16.3 | Yes | 3% |
| | 2 bedrooms | 23.8 | 24.4 | Yes | -2% |



| | | | |
|---|------|------|-----|
| 3 bedrooms | 38.9 | 39.5 | -2% |
| 4 bedrooms | 15.2 | 15.1 | 1% |
| 5 or more bedrooms | 2.4 | 2.3 | 4% |
| Source: American Community Survey Comparative Housing Estimates (CP04); 2018 and 2013 Five-Year Estimates | | | |

iii. Number of Households Transitioned to Self-Sufficiency in the Plan Year

Number of households, across MTW activities, that were transitioned to the MTW PHA's local definition of self sufficiency during the Plan Year.

| MTW ACTIVITY NAME/NUMBER | NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY* | MTW PHA LOCAL DEFINITION OF SELF SUFFICIENCY |
|--|--|---|
| FY2013-2: Simplified Earned Income Disregard | 0 | PH household who is paying a flat rent for at least 6 months or a HCV household utilizing a zero HAP voucher for at least 6 months. |
| FY2014-6: Rent Simplification | 43 | |
| FY2015-1 MDRC/HUD Rent Study | 4 | |
| FY2017-1 Time Limited Working Referral Program | 1 | |
| FY2017-1 Restorative Housing Pilot Program | 0 | |
| | 0 | <i>(Households Duplicated Across MTW Activities)</i> |
| | 48 | Total Households Transitioned to Self Sufficiency |



III. Proposed MTW Activities

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

Not Applicable.



V. Approved MTW Activities

A. Implemented Activities

Implemented activities are reported in this section using the following framework per HUD FORM 50900 (OMB Control Number: 2577-0216).

i. Plan Year Approved, Implemented, Amended

Specify the Plan Year the MTW activity was proposed. Specify the Plan Year the MTW activity was implemented. Provide any Plan Years in which the MTW activity was amended.

ii. Description/Impact/Update/Rent Reform Hardships

Provides a description of the MTW activity and detailed information on its impact during the Plan Year. Provides the applicable Standard HUD Metrics tables with numerical information for baselines, benchmarks and outcomes for the Plan Year. Describes how outcomes compared to baselines and benchmarks. Indicates whether the MTW activity is on schedule.

NOTE: For rent reform/public housing term limit activities, a description of the number and results of any hardship requests and details regarding the required "Annual Reevaluation" that the MTW PHA put in place when proposing the MTW activity.

iii. Actual Non-Significant Changes

Indicate if the MTW PHA made the planned nonsignificant changes or modifications to the MTW activity given in the Annual MTW Plan in the Plan Year. Indicate any unplanned non-significant changes or modifications to the MTW activity the MTW PHA made in the Plan Year (or state that there were none).

iv. Actual Changes to Metrics/Data Collection

Indicate if the MTW PHA made the planned changes or modifications to the metrics given in the Annual MTW Plan in the Plan Year. Indicate any unplanned changes or modifications to the metrics the MTW PHA made in the Plan Year (or state that there were none).

v. Actual Significant Changes

Indicate if any significant changes were made to the MTW activity in the Plan Year through an Annual MTW Plan amendment (or state that there were none).

vi. Challenges in Achieving Benchmarks and Possible Strategies

If benchmarks were not achieved or if the MTW activity was determined ineffective (as described in IV.A.ii above), provide a narrative explanation of the challenges and, if possible, identify potential new strategies to make the MTW activity more effective.



Summary

Below is a list of approved MTW activities and their general implementation status.

| Current Activity | Status |
|---|-------------------------------|
| 11-1e- Preservation and Expansion of Affordable Housing | Ongoing |
| 11-9- Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services | Ongoing |
| 13-2- Simplified Earned Income Disregard (S-EID) (Public Housing) | Ongoing |
| 13-4- HQS Inspection of SAHA-owned non-profits by SAHA inspectors | Ongoing |
| 14-2- Early Engagement | Closed out FY2021 |
| 14-3- Faster Implementation of Payment Standard Decreases (HCV) | Ongoing |
| 14-6- HCV Rent Reform (14-6 Rent Simplification (HCV) & 15-4- Simplified Utility Allowance Schedule) | Ongoing |
| 15-1- MDRC / HUD Rent Study | Preparing to Close out FY2022 |
| 15-2- Elderly Admissions Preference at Select Public Housing Sites | Ongoing |
| 15-3- Modified Project Based Vouchers | Ongoing |
| 17-1- Time Limited Working Referral Program | Closed out FY2021 |
| 17-2- Restorative Housing Pilot Program | Closed out FY2021 |
| 19-1- Local Implementation of SAFMR | Ongoing |
| 19-2- Alternate Recertification Process (PH and HCV) | Ongoing |
| 20-1- Palo Alto College, College Homeless Assistance Program | Implemented |
| 20-3- Family Self Sufficiency (FSS) Program Streamlining | Ongoing |
| 20-4- Time Limited Workforce Housing Pilot Program (PBV) | On Hold |
| 21-1- Next Step Housing Program (THRU Project) | Implemented |
| 21-2- Limiting increases in rents | Implemented |



FY2011-1e – Preservation and expansion of affordable housing

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended: This activity was approved and implemented in FY2011.

ii. Description/Impact/Update/Rent Reform Hardships: During the 2010-2011 fiscal year, SAHA adopted an Affordable Housing Preservation and Expansion Policy that establishes the principles, goals, priorities, and strategies to preserve and expand the supply of high quality, sustainable, and affordable housing in San Antonio. Under SAHA's broader uses of funds authority, Attachment D, the Agency can use MTW funding for local, non-traditional units providing that the activities meet the requirement of the MTW statute. While SAHA has had the authority to utilize this flexibility since 2011, the Agency did not utilize it for the construction of new units from 2011 to 2013; all development reported under this activity during those years occurred outside the scope of MTW as it used other funding sources including tax-credits, HOME funding, CDBG, and other local and state funding.

In FY2014, SAHA began utilizing this flexibility in combination with a new flexibility to combine Replacement Housing Factor (RHF) funds with the MTW block grant; the Agency executed an RHF amendment and RHF Plan that was approved by HUD in FY2014.

This activity is designed to increase housing choices. It operationalizes the preservation and expansion policies adopted in FY2011, by utilizing the local, non-traditional unit authorization under SAHA's broader uses of funds authority and securing the approval to combine RHF funds into the MTW block grant to construct new affordable units (defined as units reserved for households with income at or below 80% area median income or AMI). While SAHA may develop new communities with market-rate units in addition to affordable units; this activity does not authorize the use of RHF funds for the development of those market-rate units. It is also important to note that SAHA's flexibility to construct and/or preserve new Section 8/9 units are authorized under the single-fund flexibility only and outcomes are reported in the sources and uses section of this report (Section V). The only units authorized under this activity are units reserved for households with income at or below 80% AMI that are non-Section 8/9.

Plan Year Update

This activity is ongoing. The tables below compare the baselines and benchmarks for each metric. All outcomes have met the benchmarks and no explanation is therefore necessary.

This fiscal year, the Agency used MTW flexibilities to preserve units at Rosemont at Highland Park. See Section V for more information.



HUD Standard metrics

| HC #1: Additional Units of Housing Made Available | | | | |
|---|---|--|--|---------------------|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box. | Housing units of this type prior to implementation of the activity (number). This number may be zero. | Expected housing units of this type after implementation of the activity (number). | Actual housing units of this type after implementation of the activity (number). | Benchmark met |
| | 0 | 0 | 0 | |
| HC #2: Units of Housing Preserved | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box. | Housing units preserved prior to implementation of the activity (number). | Expected housing units preserved after implementation of the activity (number). | Actual housing units preserved after implementation of the activity (number). | Benchmark met |
| | 0 | 0 | 252 | |

iii. **Actual Non-Significant Changes:** None.

iv. **Actual Changes to Metrics/Data Collection:** None.

v. **Actual Significant Changes:** None.

vi. **Challenges in Achieving Benchmarks and Possible Strategies:** None.



FY2011-9 – Allocate set-asides of tenant-based vouchers for households referred by non-profit partners who will provide supportive services to those households

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended: This activity was approved in the FY2011 plan and implemented in December 2011

ii. Description/Impact/Update/Rent Reform Hardships: SAHA allocates set-asides of tenant-based vouchers for households referred by non-profit partners who commit to provide supportive services. The set-asides are for households with specific priority needs, such as those who are homeless. Current partners are the Center for Health Care Services (CHCS), San Antonio Metropolitan Ministries (SAMB), and South Alamo Regional Alliance for the Homeless (SARAH). Partners provide a needs assessment of the household in order to qualify and certify them as homeless as defined by HUD. Once the household is determined eligible by the partners, the household is referred to SAHA and placed on the waiting list. When the household is selected from the SAHA waiting list, SAHA processes all referrals in accordance with HUD guidelines and the SAHA voucher program Administrative Plan. The household is scheduled for an appointment with SAHA staff to determine eligibility. Once the household is determined eligible they complete documents necessary for processing. One requirement of the program is that partners provide intensive case management for one year to every household participating in the program. Partners provide reports to SAHA on a quarterly basis.

Plan Year Update

This activity is fully implemented, ongoing, and on schedule. At fiscal year end, the Agency had secured partner-provided supportive services for 268 households housed through the set-aside voucher program. Housing stability indicators remain below benchmark. The tables below compare the baselines and benchmarks for each metric. As indicated in the table, the Agency continues to work with referring partners to increase utilization and facilitate stable housing.

HUD Standard Metrics

| HC #7: Households Assisted by Services that Increase Housing Choice | | | | |
|--|--|---|---|--|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving services aimed to increase housing choice (increase). | Households receiving this type of service prior to implementation of the activity (number). This number may be zero. | Expected number of households receiving these services after implementation of the activity (number). | Actual number of households receiving these services after implementation of the activity (number). | Benchmark met. SAHA continues to request referrals from partners to increase utilization for this program. |
| | 0 | up to 340 | 268 | |

SAHA Metrics

| |
|----------------------------|
| Maintain Households Served |
|----------------------------|



| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Percentage of households served that continue to be housed after 2 years | 0 | 90% | 52% | Benchmark not met. |
| Percentage of households served that continue to be housed after 1 years | 0 | 90% | 49% | Benchmark not met. |

iii. Actual Non-Significant Changes: The Agency set-aside an additional 100 vouchers effective May 2021 to assist in response to the ongoing pandemic. These vouchers are in partnership with our local homeless providers.

iv. Actual Changes to Metrics/Data Collection: The benchmark was updated to reflect the newly allocated vouchers.

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: SAHA continues to work with partners to provide housing to populations facing homelessness. Benchmarks for the percentage of households served after 1 and 2 years continue to not meet benchmarks. Currently, SAHA and its partners are working together to respond to the ongoing pandemic as well as impacts related to Winter Storm Uri.



FY2013-2 – Simplified Earned Income Disregard (S-EID)

MTW Statutory Objective(s): Promote Self-Sufficiency and Reduce cost and increase cost effectiveness

i. Plan Year Approved, Implemented, Amended: This activity was approved in FY2013 and implemented in FY2014.

ii. Description/Impact/Update/Rent Reform Hardships: This activity expands the number of months for which EID (referred to as earned-income disregard or earned-income disallowance) is available to participants from 24 months to 60 months, and makes the benefit available continuously during the 60 months, without start/stop. Income is disregarded on a sliding scale based on year of participation:

- During year 1, 100% of earned income is disregarded
- Year 2: 80%
- Year 3: 60%
- Year 4: 40%
- Year 5: 20%

The head, spouse, or co-head of the household qualifies the entire household (formerly only Head of Household could participate). SAHA has completed research on the ability to reconcile various program requirements around escrows and EID for Family Self-Sufficiency (FSS) households. Because the program requirements cannot be reconciled, FSS households are no longer eligible for the S-EID. Participation in the Jobs-Plus program remains a requirement for S-EID participants.

Starting in FY2016, SAHA required participating households to attend quarterly financial counseling sessions, in order to ensure that families are given all the tools and knowledge necessary to succeed. At the time of the referral, staff schedule an appointment with financial counseling providers such as Family Service Association or the Financial Empowerment Center. Participating households need to attend the counseling sessions within the time to process the change, or within one month of processing.

For participants who are unable to attend an in-person session, online options are provided and monitored by staff.

Jobs-Plus Staff monitor attendance, and follow up with members to ensure they are on track. Should they fail to attend, staff report back to management when a member lapses. A hardship provision allows a grace period for unforeseen circumstances.

Plan Year Update

The Agency originally intended to phase out this activity during FY2021 and close it out in this year's report. As of FY2020, grants supported by this activity have ended and no additional



grant-funded opportunities have been identified to continue the model of leveraging SEID as a financial incentive coupled with employment related supportive services. The Agency continues to administer the SEID for households that were enrolled in previous grant programs and continues to offer supportive services. There were seven households active on SEID at the end of the fiscal year and the Agency would like to ensure they can continue until their term expires and/or they exit the housing program.

The Agency has been awarded a new Jobs Plus Grant that utilizes an EID with different parameters than this activity. The Agency will be reviewing this activity and new grant opportunities on the horizon to determine whether this alternate calculation will be necessary in supporting residents in achieving financial stability. The Agency may replace this activity or propose changes in an upcoming plan.

The tables below compare the baselines and benchmarks for each metric. The activity is not meeting many of the benchmarks; however, the Agency is preparing to close this activity out.

HUD Standard Metrics

| SS #1: Increase in Household Income | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average earned income of households affected by this policy in dollars (increase). | Average earned income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars). | Actual average earned income of households affected by this policy prior to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| | \$11,000 | \$12,100 | Working Households: \$17,454 Total Households: \$4,987 | Benchmark met. |
| SS #3: Increase in Positive Outcomes in Employment Status | | | | |
| Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| (6) Other (Heads with any Earned Income) | Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero. | Expected head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number). | Actual head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |



| | | | | |
|--|---|--|--|---|
| | 0 | 20 | 7 | Benchmark not met. |
| (6) Other (Heads with any Earned Income) | Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero. | Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent). | Actual percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent). | Whether the outcome meets or exceeds the benchmark. |
| | 0 | 100% | 33% 2 out of 6 work-able households (Non-Elderly and Non-Disabled Heads/Co-Heads/Spouses) | Benchmark not met. |
| SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving TANF assistance (decrease). | Households receiving TANF prior to implementation of the activity (number) | Expected number of households receiving TANF after implementation of the activity (number). | Actual households receiving TANF after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | 0 | 0 | 0 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| SS #5: Households Assisted by Services that Increase Self Sufficiency | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving services aimed to increase | Households receiving self-sufficiency services prior to implementation | Expected number of households receiving self-sufficiency services after implementation of the activity (number). | Actual number of households receiving self-sufficiency services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |



| | | | | |
|---|--|---|---|--|
| self-sufficiency (increase) | of the activity (number). | | | |
| | 0 | up to 200 | 7 active in S-EID/ 7 receiving additional supportive services | Benchmark not met. |
| SS #8: Households Transitioned to Self Sufficiency | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | 0 | 0 | 0 | Benchmark met. |
| CE #1: Agency Cost Savings | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| | \$647 (25 HOURS * \$25.89) | \$181 (7 HOURS * \$25.89) | \$181 (7 HOURS * \$25.89) | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change) |



| | | | | expected) has been set. |
|---|--|--|--|---|
| CE #2: Staff Time Savings | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |
| | 7 | 7 | 7 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| CE #3: Decrease in Error Rate of Task Execution | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of the activity (percentage). | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |
| | 13.22 | 10.62 (3% decrease) | Not available due to COVID-19 related modified operations and limited internal auditing | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. |
| CE #5: Increase in Agency Rental Revenue | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Rental revenue in dollars (increase). | Rental revenue prior to implementation | Expected rental revenue after implementation of the activity (in dollars). | Actual rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or |



| | | | | |
|--|-------------------------------|-----------|----------|---|
| | of the activity (in dollars). | | | exceeds the benchmark. |
| | \$130,284 | \$130,284 | \$11,112 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

SAHA Metrics

| Number of Household Members who take advantage of disregard (average) | | | | |
|---|----------|-----------|---------|---------------------|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of Household Members who take advantage of disregard (average) | 1 | 1.5 | 1 | Benchmark not met. |

iii. **Actual Non-Significant Changes:** None.

iv. **Actual Changes to Metrics/Data Collection:** None.

v. **Actual Significant Changes:** None.

vi. **Challenges in Achieving Benchmarks and Possible Strategies:** None.



FY2013-4 – HQS Inspection of SAHA-owned non-profits by SAHA inspectors

MTW Statutory Objective(s): Reduce cost and increase cost effectiveness

i. Plan Year Approved, Implemented, Amended: This activity was approved and implemented in FY2013.

ii. Description/Impact/Update/Rent Reform Hardships: This activity allows SAHA inspectors (instead of third-party contractors) to inspect and perform rent reasonableness assessments for units at properties that are either owned by SAHA under the Agency’s non-profit portfolio, Beacon Communities, or owned by a SAHA-affiliate under the Agency’s partnerships portfolio.

Plan Year Update

The Agency continues to modify operations in response to local conditions related to the ongoing pandemic. As a result, the number of inspections being completed has been reduced. While the total savings for this fiscal year is less than savings captured prior to the pandemic, the per unit inspection cost continues to drive cost savings for these inspections. This activity is ongoing and on track. Since implementation, the Agency has saved an estimated \$622,000. The tables below compare the baselines and benchmarks for each metric. All outcomes have met the benchmarks and no explanation is therefore necessary.

HUD Standard Metrics

| CE #1: Agency Cost Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark |
| | 2,008 inspections * \$42.90 = \$86,143 | 2,008 inspections * \$35.06 = \$70,400 | 2,008 inspections * \$35.06 = \$70,400 | Benchmark was met. Savings= \$15,743 |
| CE #2: Staff Time Savings | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark |
| | 0 hours | 2,008 inspections x .5 hours = 1,004 hours | 2,008 inspections x .5 hours = 1,004 hours | Activity is not designed to impact metric; metric is included for MTW |



| | | | | |
|--|--|--|--|---|
| | | | | standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
|--|--|--|--|---|

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: None.

Per Inspection Costs

| Metric | Baseline | Benchmark | Savings |
|----------------------------|--|--|---|
| CE #1: Agency Cost Savings | Per Inspection FY13-15: \$76.32 FY16-20: \$42.90 | Per Inspection FY13-15: \$20.86 FY16-20: \$35.06 | Per Inspection FY13-15: \$55.46 FY16-20: \$7.84 |

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: SAHA will continue to monitor the cost savings to ensure the inspection cost remains below third-party cost levels and the number of inspections continues to be effectively absorbed by current staffing levels. The cost per inspection has stayed the same during COVID; however, the Agency has completed fewer inspections.



FY2014-3 – Faster Implementation of Payment Standard Decreases (HCV)**MTW Statutory Objective(s):** Reduce cost and increase cost effectiveness

i. Plan Year Approved, Implemented, Amended: This activity was approved and implemented in FY2014.

ii. Description/Impact/Update/Rent Reform Hardships: Currently, when Fair Market Rent (FMR) is reduced and the payment standard is adjusted accordingly, the reduced payment standard is applied at each participant's second regular reexamination. This activity will allow SAHA to apply the lower payment standards at each participant's next reexamination (Move, Interim and/or Annual reexaminations). If the participant's rent portion increases as a result of applying the new payment standard, SAHA will provide the participant a 30-day notice of rental increase. The per unit cost will be calculated by the total housing assistance payments divided by the total number of units leased each month. The housing assistance payments expense will be obtained from the monthly financial statements and the total units will be obtained from the Unit Month Report.

Plan Year Update

The FMRs increased in FY2021; therefore, this waiver was not utilized during the fiscal year.

HUD Standard Metrics

| CE #1: Agency Cost Savings (HCV) | | | | |
|---|---|--|--|--|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark |
| | 12,129 Annual Average Households Served (FY2014) multiplied by \$568.43 | 12,129 Annual Average Households Served (FY2014) multiplied by \$537.96 | NA | NA |

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: None.

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: None.



FY2014-6 – HCV Rent Reform (consolidates previously approved activities into one and renames it to clarify intent)

Previously approved

FY2014-6: Rent Simplification (HCV)

FY2015-4: Simplified Utility Allowance Schedule

MTW Statutory Objective(s): Reduce cost and increase cost effectiveness

i. Plan Year Approved, Implemented, Amended: FY2014-6: Rent Simplification (HCV) was approved in FY2014 and implemented in July 2015. FY2015-4: Simplified Utility Allowance Schedule was approved in FY2015 and implemented in January 2014 for vouchers issued and May 2014 reexaminations.

ii. Description/Impact/Update/Rent Reform Hardships: This activity has two elements: (1) simplified rent calculation (previously approved under FY2014-6: Rent Simplification) and (2) simplified utility allowance schedule (previously approved under FY2015-4: Simplified Utility Allowance Schedule).

(1) Rent simplification: Traditionally, rent calculation is based on 30% of the participant's adjusted monthly income. This activity lowers the percentage used to calculate rent to 27.5% of monthly gross income for all MTW HCV participants and new admissions, and eliminates deductions (i.e., medical and child care) with minimal impact to the participants' rent portion. MTW participants who experience a rent increase of \$26 or more due to the rent simplification calculation will have the household's Total Tenant Payment (TTP) calculated in accordance with 24 CFR 5.628 (i.e., non-MTW TTP calculation). Participants who are granted a hardship exemption will remain exempt until their rent portion falls below the \$26 threshold. Hardship exemptions under this provision will be verified at each annual and interim reexamination. SAHA is 1 of 4 MTW agencies participating in a rent reform study. Households who are not part of the study (approximately 2,000) will follow FY2014-6 rent policies.

(2) Simplified Utility Allowance Schedule: Traditionally, SAHA annually reviews and periodically re-establishes a Utility Allowance Schedule which represents reasonable utility cost expectations as part of a tenant's lease. The Utility Allowance Schedule is based on utility surveys and analysis of the type of structure, bedroom size, appliances provided by tenant, and type of appliances (gas/electric).

This activity establishes a new, simplified schedule that is based on the analysis of data collected from SAHA's existing HCV portfolio including the most common structure and utility types. The simplified schedule reduces administrative costs associated with the traditional method of applying a Utility Allowance Schedule. Specifically, the activity will allow the HCV department to



be more cost effective by reducing staff time spent on calculating multiple utility schedules for 6 different structure types plus various utility types such as gas, electric or propane.

Note that this activity applies only to HCV participants that are not part of FY2015-1 MDRC/HUD Rent Study. If a household is selected to participate in the control or treatment group of the Rent Study, they will be subject only to FY2015-1, and not this activity FY2015-4.

The simplified utility allowance schedule is also anticipated to benefit property owners, who will have a more accurate understanding of the total gross rent to be applied to their properties, and to benefit participants, who will be able to use this new schedule to clarify gross rent in their selection of housing units.

The new utility allowance schedule is implemented at the time of recertification, interim or change of unit. The schedule will be applied to the lesser of these two options:

- the actual size of the unit, or
- the size of the voucher.

SAHA will continue to use current market consumption data to determine when adjustments to the simplified schedule are needed (upon change of more than 10% in rates).

Plan Year Update

This activity is ongoing. The Agency updated the Simplified Utility Allowances in December 2021. The tables below compare the baselines and benchmarks for each metric. All outcomes have met the benchmarks and no explanation is therefore necessary.

The “CE #3: Decrease in Error Rate of Task Execution” metric is not available for FY21 as a result of modified operations due to the ongoing pandemic.

HUD Standard Metrics

| CE #1: Agency Cost Savings | | | | |
|---|--|--|--|--|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark |
| | Average Staff Salary * 1 hours * # of households processed | Average Staff Salary * .25 hours * # of households processed | Average Staff Salary * .25 hours * # of households processed | Benchmark met |
| | $\$25.58 * 1 * 4,543 = \$116,210$ | $\$25.58 * .25 * 4,543 = \$29,052$ | $\$25.58 * .25 * 4,543 = \$29,052$ | |
| CE #2: Staff Time Savings | | | | |
| | Baseline | Benchmark | Outcome | Benchmark Achieved? |



| Unit of Measurement | | | | |
|--|--|--|--|--|
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark |
| | 1 hour * # Households on Rent Simplification | .25 hours * # Households on Rent Simplification | .25 hours * # Households on Rent Simplification | Benchmark met |
| | 4,543 | 1,136 | 1,136 | |

CE #3: Decrease in Error Rate of Task Execution

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|--|--|--|---|
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of the activity (percentage). | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |
| | 11% | 5% | N/A | N/A |

CE #5: Increase in Agency Rental Revenue (HCV)

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|--|--|--|---|
| Rental revenue in dollars (increase). (Defined as Average Tenant Rent to Owner) | Rental revenue prior to implementation of the activity (in dollars). | Expected rental revenue after implementation of the activity (in dollars). | Actual rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| | \$254.24 | \$254.24 | \$269.36 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

SS #1: Increase in Household Income(HCV)

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|--|---|--|---|
| Average earned income of households affected by this policy in dollars (increase). | Average earned income of households affected by this policy prior to | Expected average earned income of households affected by this policy prior to | Actual average earned income of households affected by this policy prior to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |



| | implementation of the activity (in dollars). | implementation of the activity (in dollars). | | |
|---|---|--|--|---|
| | \$4,168 | \$4,168 | \$4,380 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| SS #3: Increase in Positive Outcomes in Employment Status (HCV) | | | | |
| Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| (6) Other (Heads with any Earned Income) | Number of total households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero. | Expected number of total households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity. | Actual number of total households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity. | Whether the outcome meets or exceeds the benchmark. |
| | 1,102 | 1,102 | 1,193 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| (6) Other (Heads with any Earned Income) | Percentage of total households in (6) Other (defined as | Expected percentage of total households in (6) Other (defined as head(s) of households | Actual percentage of total households in (6) Other (defined as head(s) of households | Whether the outcome meets or |



| | | | | |
|--|---|---|---|---|
| | head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero. | with earned income) after implementation of the activity (percent). | with earned income) after implementation of the activity (percent). | exceeds the benchmark. |
| | 29% | 29% | 26% | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) (HCV) | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| | Households receiving TANF prior to implementation of the activity (number) | Expected number of households receiving TANF after implementation of the activity (number). | Actual households receiving TANF after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Number of households receiving TANF assistance (decrease). | 47 | 47 | 35 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| SS #8: Households Transitioned to Self Sufficiency (HCV) | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency | Households transitioned to self-sufficiency | Expected households transitioned to self-sufficiency | Actual households transitioned to self-sufficiency | Whether the outcome meets or |



| | | | | |
|--|---|---|---|--|
| <p>(increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.</p> | <p>(Number of households paying full contract rent (no subsidy) for at least 6 months) prior to implementation of the activity (number). This number may be zero.</p> | <p>(Number of households paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).</p> | <p>(Number of households paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).</p> | <p>exceeds the benchmark.</p> |
| | <p>0</p> | <p>0</p> | <p>43</p> | <p>Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.</p> |

iii. **Actual Non-Significant Changes:** None

iv. **Actual Changes to Metrics/Data Collection:** None

v. **Actual Significant Changes:** None

vi. **Challenges in Achieving Benchmarks and Possible Strategies:** None.



FY2015-1 – MDRC / HUD Rent Reform Study

MTW Statutory Objective(s): Increase housing choices, reduce cost and increase cost effectiveness, and promote self-sufficiency.

i. Plan Year Approved, Implemented, Amended: This activity was approved in the FY2015 plan and implemented in March 2015. Participants were selecting starting in March 2015 for June 2015 recertifications. The study was originally scheduled to end in 2018, but has since been extended until FY2021 to ensure researchers are able to gather information from two triennial recertification periods.

ii. Description/Impact/Update/Rent Reform Hardships: San Antonio Housing Authority (SAHA) has been selected to participate in a study commissioned by the U.S. Department of Housing and Urban Development (HUD) to evaluate a Housing Choice Voucher (HCV) alternative rent reform policy (the “Study”). MDRC, a nonprofit and nonpartisan education and social policy research organization, is conducting the Study on behalf of HUD. The Study sets forth alternative rent calculation and recertification strategies that will be implemented at several public housing authorities across the country in order to fully test the policies nationally.

The goals of this alternative rent policy are to:

- Create a stronger financial incentive for tenants to work and advance toward self-sufficiency
- Simplify the administration of the HCV Program
- Reduce housing agency administrative burden and costs
- Improve accuracy and compliance of program administration
- Remain cost neutral or generate savings in HAP expenditures relative to expenditures under traditional rules
- Improve transparency of the program requirements

The Study Selection and Target Population Include:

- Participants were randomly selected for the Study from the pool of eligible vouchers. The Study Group vouchers using the MTW alternative policies described below. The Control Group vouchers are managed using the existing policies.
- Eligible participants in both the Study and Control Groups will include only those with vouchers that are administered under the Moving To Work (MTW) Program and not currently utilizing a biennial certification. Non-MTW Vouchers (i.e., Veterans Affairs Supportive Housing, Moderate Rehabilitation, and Shelter Plus Care), Enhanced Vouchers, and HUD Project Based Vouchers are excluded from the Study.
- Additionally, the Study is focused on work-able populations and will not include elderly households; disabled households, and households headed by people older than 56 years of age (who will become seniors during the course of the long-term study). Households currently participating in Family Self-sufficiency (FSS) and Homeownership programs will not be included in the Study. Households that contain a mix of members with an



immigration status that is eligible for housing assistance and immigration status that is non-eligible for housing assistance would not be included in the Study.

The key Rent Reform Components applied to the study group include the following six key features:

1. Simplify income determination and rent calculation of the household's Total Tenant Payment (TTP) and subsidy amount by:
 - a. Eliminating deductions and allowances,
 - b. Changing the percent of income from 30% of adjusted income to a maximum of 28% of gross income,
 - c. Ignoring income from assets when the asset value is less than \$25,000,
 - d. Using retrospective gross income, i.e., 12-month "look-back" period and, in some cases, current/anticipated income in estimating a household's TTP and subsidy, and
 - e. Capping the maximum initial rent burden at 40% of current gross monthly income.
2. Conduct triennial income recertification rather than annual recertification with provisions for interim recertification and hardship remedies, if income decreases.
3. Streamline interim certifications to eliminate income review for most household composition changes and moves to new units.
4. Require the TTP is the greater of 28% gross monthly income (see #1 above) or the minimum rent of \$100. A portion of the TTP will be paid directly to the landlord.
5. Simplify the policy for determining utility allowances.
6. Additionally, the Study will offer appropriate hardship protections to prevent any Study Group member from being unduly impacted as discussed in Section 2i below.

Plan Year Update

This activity is being phased out as the Agency processes recertifications. The agreement with the researchers ends in December 2021 and the last recertification will be completed in March 2022. All MDRC participants are being transitioned to the rent structure as approved under FY2014-6. The tables below compare the baselines and benchmarks for each metric.

Hardships: There were a total of 28 hardships received during the fiscal year. At fiscal year-end, all 28 had been approved. All 28 of the hardship requests were the result of an income decrease or loss of income.

HUD Standard Metrics

| CE #1: Agency Cost Savings | | | | |
|--------------------------------|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars. | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |



| | | | | |
|--------------------------------------|---|---|---|---------------------|
| Cost per Annual Certification | \$16,539 <ul style="list-style-type: none"> Baseline Time: 0.83 hours per cert Times average staff wage for current FY: \$25.58 FY18 Times number of Annuals Completed: 779 enrolled in study group | \$1,915 <ul style="list-style-type: none"> Benchmark Time: 0.39 hours per cert Times average staff wage for current FY: \$25.58 FY18 Times number of Annuals Completed | \$1,915 <ul style="list-style-type: none"> Benchmark Time: 0.39 hours per cert Times average staff wage for current FY: \$25.58 FY18 Times number of Annuals Completed | Benchmark met |
| Cost per Interim Certification | \$4,512 <ul style="list-style-type: none"> Baseline Time: 0.42 hours per interim Times average staff wage for current FY: \$25.58 FY18 Times number of Interims Completed: 779 enrolled in study group | \$2,041 <ul style="list-style-type: none"> Baseline Time: 0.19 hours per interim Times average staff wage for current FY: \$25.58 FY18 Times number of Interims Completed | FY2021: \$1,512 (311 Interims) <ul style="list-style-type: none"> Benchmark Time: 0.19 hours per interim Times average staff wage for current FY: \$25.58 FY18 Times number of Interims Completed | Benchmark met |
| Cost of Rent Calculation | \$10,121 <ul style="list-style-type: none"> Baseline Time: 0.33 hours per calculation Times average staff wage for current FY: \$25.58 FY18 Times number of Calculations Completed: 779 enrolled in study group | \$2,035 <ul style="list-style-type: none"> Baseline Time: 0.13 hours per calculation Times average staff wage for current FY: \$25.58 FY18 Times number of Calculations Completed | \$1,673 (311 calculations) <ul style="list-style-type: none"> Baseline Time: 0.13 hours per calculation Times average staff wage for current FY: \$25.58 FY18 Times number of Calculations Completed | Benchmark met |
| Cost to Determine Income from Assets | FY2021: \$25 <ul style="list-style-type: none"> Baseline Time to determine Income from Assets: 1.27 hours Times average staff wage: \$21.95 Times number of Calculations Completed: Of the 779 enrolled in study group .38% will need asset calculations per traditional policy | FY2020: \$3 <ul style="list-style-type: none"> Benchmark Time to determine Income from Assets: 0.17 hours Times average staff wage: \$21.95 Times number of Calculations Completed: Of the study group, the number with assets above \$25,000 | FY2020: \$8 (1 determination) <ul style="list-style-type: none"> Benchmark Time to determine Income from Assets: 0.17 hours Times average staff wage: \$21.95 Times number of Calculations Completed: Of the study group, the number with assets above \$25,000 | Benchmark met |
| Cost to Determine utility allowance | \$10,121 <ul style="list-style-type: none"> Baseline Time: 0.33 hours per calculation Times average staff wage for current FY: \$25.58 FY18 Times number of Calculations Completed: 779 enrolled in study group | \$5,166 <ul style="list-style-type: none"> Baseline Time: 0.33 hours per calculation Times average staff wage for current FY: \$25.58 FY18 Times number of Calculations Completed | \$4,246 <ul style="list-style-type: none"> Baseline Time: 0.33 hours per calculation Times average staff wage for current FY: \$25.58 FY18 Times number of Calculations Completed | Benchmark met |
| CE #2: Staff Time Savings | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |



| | | | | |
|---|---|---|---|---|
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |
| Time to Complete Annual Certification | FY2021: 647 <ul style="list-style-type: none"> Baseline Time.0.83 hours per cert Times number of Annuals Completed: 779 enrolled in study group | FY2021: 75 <ul style="list-style-type: none"> Benchmark Time.0.39 hours per cert Times number of Annuals Completed for study group | FY2021: 75 (192 annuals) <ul style="list-style-type: none"> Benchmark Time.0.39 hours per cert Times number of Annuals Completed for study group | Benchmark met |
| Time To Determine Tenant Rent | FY2021: 396 <ul style="list-style-type: none"> Time to Determine Tenant Rent: 0.33 hours times the number of rent determinations completed for study group | FY2021: 80 <ul style="list-style-type: none"> Time to Determine Tenant Rent: 0.13 hours times the number of rent determinations completed for study group | FY2021: 65 <ul style="list-style-type: none"> Time to Determine Tenant Rent: 0.13 hours times the number of rent determinations completed for study group | Benchmark met |
| Time to Determine Utility Allowance | FY2021: 396 <ul style="list-style-type: none"> Time to Determine Utility Allowance: 0.17 hours times the number of UA determinations completed for study group | FY2021: 202 <ul style="list-style-type: none"> Time to Determine Utility Allowance: 0.097 hours times the number of UA determinations completed for study group | FY2021: 166 <ul style="list-style-type: none"> Time to Determine Utility Allowance: 0.097 hours times the number of UA determinations completed for study group | Benchmark met |
| Time to Determine Income from Assets | FY2021: 1 <ul style="list-style-type: none"> Time to Determine Income from Assets: 0.33 hours times the number of study participants: 1,000 times the estimated proportion of affected participants: 0.0038 (0.38%) | FY2021: .33 <ul style="list-style-type: none"> Time to Determine Income from Assets: 0.33 hours times the number of study participants: 1,000 times the estimated proportion of affected participants: 0.0005 (0.05%) | FY2021: .33 <ul style="list-style-type: none"> Time to Determine Income from Assets: 0.33 hours times the number of study participants: 1,000 times the estimated proportion of affected participants | Benchmark met |
| CE #3: Decrease in Error Rate of Task Execution | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of the activity (percentage) | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |



| | | | | |
|---|---|--|--|---|
| Average Error Rate in Determining TTP | 18% | 15% | n/a | Benchmark not met |
| Average Error Rate in Determining Utility Allowance | 2% | 2% | n/a | Benchmark not met |
| SS #1: Increase in Household Income | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average earned income of households affected by this policy in dollars (increase). | Average earned income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars). | Actual average earned income of households affected by this policy prior to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| Average Earned Income of Study Group | \$7,705 | \$7,705 | \$9,369 | Benchmark met |
| SS #3: Increase in Positive Outcomes in Employment Status | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other | Head(s) of households in the categories identified below prior to implementation of the activity (number). This number may be zero. | Expected head(s) of households in the categories identified below after implementation of the activity (number). | Actual head(s) of households in the categories identified below after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in the categories identified below prior to implementation of activity (percent). This number may be zero. | Expected percentage of total work-able households in the categories identified below after implementation of the activity (percent). | Actual percentage of total work-able households in the categories identified below after implementation of the activity (percent). | Whether the outcome meets or exceeds the benchmark. |



| | | | | |
|--|---|--|---|---------------|
| Study Group Employment Status for (1) Employed Full- Time: (2) Employed Part- Time: (3) Enrolled in an Educational Program: (4) Enrolled in Job Training Program: (5) Unemployed: (6) Other:with any wages | (1) Employed FT: 211 or 26% (2) Employed PT: 160 or 20% (3) Enrolled in an Educational Program: NA (4) Enrolled in Job Training Program: NA (5) Unemployed: 241 or 30% (6) Other: 558 or 70% | (1) Employed FT: 211 or 26% (2) Employed PT: 160 or 20% (3) Enrolled in an Educational Program: NA (4) Enrolled in Job Training Program: NA (5) Unemployed: 241 or 30% (6) Other: 558 or 70% (7) | (1)Employed FT: 165or 33% (2)Employed PT: 101or 20% (3) Enrolled in an Educational Program: NA (4) Enrolled in Job Training Program: NA (5) Unemployed: 135or 27% (6) Other: 368or 73% | Benchmark met |
|--|---|--|---|---------------|

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|---|---|---|---|
| Number of households receiving TANF assistance (decrease). | Households receiving TANF prior to implementation of the activity (number). | Expected number of households receiving TANF after implementation of the activity (number). | Actual households receiving TANF after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Study Group Households Receiving TANF Benefits | 17 | 17 | 3 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

SS #5: Households Assisted by Services that Increase Self-sufficiency

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|--|---|---------------------------------------|---|
| Number of households receiving services | Households receiving self-sufficiency services | Expected number of households receiving | Actual number of households receiving | Whether the outcome meets or exceeds the benchmark. |



| | | | | |
|---|--|---|---|---|
| aimed to increase self-sufficiency (increase). | prior to implementation of the activity (number). | self-sufficiency services after implementation of the activity (number). | self-sufficiency services after implementation of the activity (number). | |
| Study Group Households Receiving Self-sufficiency Services | 15 | 15 | 13 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| SS #6: Reducing Per Unit Subsidy Costs for Participating Households | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease). | Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). | Expected average subsidy per household affected by this policy after implementation of the activity (in dollars). | Actual average subsidy per household affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| Average HCV Subsidy for Study Group | \$637.59 | \$637.59 | \$712.37 | Benchmark not met |
| SS #7: Increase in Agency Rental Revenue | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| PHA rental revenue in dollars (increase). | PHA rental revenue prior to implementation of the activity (in dollars). | Expected PHA rental revenue after implementation of the activity (in dollars). | Actual PHA rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| Total HCV Tenant Share for Study Group | \$234.08 | \$234.08 | \$284.82 | Benchmark met |
| SS #8: Households Transitioned to Self Sufficiency | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create | Households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) prior to | Expected households transitioned to self-sufficiency (Number of households paying a | Actual households transitioned to self-sufficiency (Number of households | Whether the outcome meets or exceeds the benchmark. |



| | | | | |
|--|--|---|---|---|
| one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided. | implementation of the activity (number). This number may be zero. | flat rent for at least 6 months) after implementation of the activity (number). | paying a flat rent for at least 6 months) after implementation of the activity (number). | |
| | 0 | 0 | 0 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |
| HC #5: Increase in Resident Mobility | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity (number). This number may be zero. | Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number). | Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | 0 | 0 | 0 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies:

There have been administrative challenges with the transition. We cannot process transfers from MDRC to Rent Simplification until the effective date. Staffing shortages have slowed down processes. Study clients have been transitioning out during the recertification period.



FY2015-2 – Elderly Admissions Preference at Select Public Housing Sites

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended: This activity was approved and implemented in FY2015.

ii. Description/Impact/Update/Rent Reform Hardships: This activity establishes a 4-to-1 elderly admissions preference at specific communities in order to increase housing choices for elderly households. The goal of the activity is to address continuing concerns of elderly residents at specific communities regarding lifestyle conflicts between elderly and non-elderly residents. Property Management’s ability to address these conflicts is reduced significantly when the ratio of non-elderly to elderly residents rises above a certain proportion. The 4-to-1 admissions preference is proposed in order to create and maintain an optimal mix of elderly and non-elderly residents in each community.

The idea of an optimal mix is based on research of the reaction to a 1995 Massachusetts law that attempted to limit the percentage of non-elderly disabled tenants living in state-funded elderly housing. In 2002, the Massachusetts Office of Legislative Research provided an update on the success of the 1995 law, which had established optimal proportions of 86.5% elderly and 13.5% non-elderly residents. Housing officials reported that the law had been largely successful in:

- reducing the number of problems that arise from these mixed populations sharing the same housing;
- slowing what had been a sharply increasing rate of non-elderly disabled households moving in; and
- reducing the relatively high percentage of non-elderly disabled tenants in certain projects.

Housing advocates, however, suggested that the optimal proportion should be 80% elderly and 20% non-elderly residents. This MTW activity, FY2015-2, adopts that suggested 80/20 ratio (“4-to-1”) both for its admissions preference as well as for its ultimate unit mix.

In practical terms, this activity allows the admission of four elderly applicants from the waiting list before admitting a non-elderly applicant, until such time as an optimal mix of elderly and non-elderly disabled residents is reached for the community. No residents will be required to relocate in order to meet these targets. The agency is not establishing a date by which to achieve the 80/20 target, and will rely solely on the normal resident turnover process to gradually transition the population balance.

The first communities at which this policy has applied are Fair Avenue (216 units) and WC White (75 units).

Plan Year Update

This activity is ongoing. The tables below compare the baselines and benchmarks for each metric. The benchmarks have been met within a reasonable / acceptable margin.



HUD Standard Metrics

| HC #1: Additional Units of Housing Made Available | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). Units occupied by elderly family | Housing units of this type prior to implementation of the activity (number). This number may be zero. | Expected housing units of this type after implementation of the activity (number). | Actual housing units of this type after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Total number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase). | 208 units occupied by elderly family | 328 units occupied by elderly family | 313 units occupied by elderly family/ 105 additional units occupied by elderly family (313 minus 208) | Benchmark met. |
| At Fair Avenue, number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase). | 110 units occupied by elderly family | 173 units occupied by elderly family | 162 units occupied by elderly family/ 52 additional units occupied by elderly family (162 minus 110) | Benchmark met. |
| At WC White, number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase). | 38 units occupied by elderly family | 60 units occupied by elderly family | 61 units occupied by elderly family/ 20 additional units occupied by elderly family (58 minus 38) | Benchmark met. |
| At Lewis Chatham, number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase). | 60 units occupied by elderly family | 95 units occupied by elderly family | 90 units occupied by elderly family/ 30 additional units occupied by elderly family (90 minus 60) | Benchmark not met. |

SAHA Metrics

| Elderly Household Percentage | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Percentage of units occupied by elderly households | Percentage of units occupied by elderly households prior to implementation of the activity | Expected percentage of units occupied by elderly households after implementation of the activity | Actual percentage of units occupied by elderly households after implementation of the activity | Whether the outcome meets or exceeds the benchmark. |
| Total | 51% | 80% | 78% | Benchmark met. |
| Fair Avenue | 51% | 80% | 78% | Benchmark met. |



| | | | | |
|---------------|-----|-----|-----|----------------|
| WC White | 51% | 80% | 82% | Benchmark met. |
| Lewis Chatham | 51% | 80% | 76% | Benchmark met. |

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: None.

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: None.



FY2015-3 – Modified Project Based Vouchers

MTW Statutory Objective(s): Reduce cost and increase cost effectiveness and increase housing choices

i. Plan Year Approved, Implemented, Amended: This activity was approved and implemented in FY2015.

ii. Description/Impact/Update/Rent Reform Hardships: First, this activity allows SAHA to commit vouchers to developments in SAHA's new and existing properties. The vouchers increase the number of units that are affordable to households based on their actual ability to pay. For example, a tax credit rent affordable to a 30% AMI household will be affordable to a 4-person household earning \$17,640 or more. However, many households earn much less than that, and a 4-person household earning \$10,000 (typical for SAHA-assisted households) is not able to afford a tax credit rent affordable to a 30% AMI household. SAHA may commit vouchers to San Juan Homes III, East Meadows (formerly Wheatley Courts), Victoria Commons, or any other SAHA-owned or SAHA-controlled development. This activity applies only to commitment of vouchers to SAHA-owned or controlled units. Any commitment of vouchers to privately-owned developments will be made through a competitive process outside the scope of this activity.

Secondly, this activity also increases cost effectiveness by removing the automatic provision of a tenant-based voucher to a household who wishes to relocate from a unit associated with a local project based set aside voucher. This stabilizes overall occupancy at the communities where vouchers are committed.

Plan Year Update

This activity is ongoing and on track. At fiscal year end, the Agency had not project-based any new vouchers under this activity as planned. This activity continues to provide deeper affordability to households as a result of the income-based rents versus tax-credit restricted rents. Per the metric table, the actual AMI level of households is well below the upper AMI limit.

HUD Standard Metrics

| HC #1: Additional Units of Housing Made Available | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box. Project-Based Vouchers | Housing units of this type prior to implementation of the activity (number). | Expected housing units of this type after implementation of the activity (number). | Actual housing units of this type after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |



| | | | | | |
|--|--|--|--|---|---------------|
| | | This number may be zero. | | | |
| # of additional units made affordable to households based on their actual ability to pay (at or below 80% AMI) | 0 | 0 | 0 | | |
| <i>Previously added units</i> | | | | | Benchmark met |
| Gardens at San Juan Square (FY15) | 0 | 31 | 31 | | |
| East Meadows (FY17) | 0 | 8 | 8 | | |
| Wheatley Senior Park Senior Living (FY18) | 0 | 36 | 36 | | |
| Woodhill (FY20) | 0 | 10 | 10 | | |
| Rosemont at Highland Park (FY20) | 0 | 20 | 20 | | |
| CE #1: Agency Cost Savings | | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? | |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. | |
| | # of units * average per unit cost (PUC) * 12 months 30 * \$586.64 * 12 = \$211,190.40 | \$0 | \$0 | Benchmark met | |
| CE #2: Staff Time Savings | | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? | |
| Total time to complete the task in staff hours (decrease). Wheatley Park Senior Living | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. | |
| | # of recertifications after 3 years (due to triennial recertification schedule) * average staff time per recertification (in hours) 30 * 1.5 = 45 hours | 0 hours | 0 hours | Benchmark met | |

SAHA Metrics



| Median household income | | | | |
|--|------------------------------------|-----------|---------|--------------------------------------|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Median income of households living in local project based set-aside voucher units, by income bracket | Metrics listed by community below. | | | |
| 80% AMI | 80% AMI | 75% AMI | 51% | Benchmark met |
| 60% AMI | 60% AMI | 55% AMI | NA | NA – There were no 60% AMI occupants |
| 50% AMI | 50% AMI | 45% AMI | 40% AMI | Benchmark met |
| 30% AMI | 30% AMI | 25% AMI | 18% AMI | Benchmark met |

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: None.

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: None.



FY2019-1 – Local Small Area Fair Market Rent (SAFMR) Implementation

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended: This activity was proposed in the FY2019 MTW Plan and approved in June 2018. Implementation began July 1, 2019. Because SAHA meets with clients 120 days in advance of their certification date, the transition to phase I of the new policy was effective October 1, 2018 for new admissions and moves and November 1, 2018 for recertifications. The transition to phase II of the new policy was effective January 1, 2020 for new admissions and moves and February 1, 2020 for recertifications and interim re-examinations.

ii. Description/Impact/Update/Rent Reform Hardships

This activity is designed to achieve the MTW statutory objective to increase housing choices for low-income families, by creating payment standards that better reflect market conditions in different parts of San Antonio, and so making a larger number of San Antonio neighborhoods affordable for voucher households. This activity is a local implementation of HUD's Small Area Fair Market Rents (SAFMR).

Because of the potential impact (positive and negative) on a large number of voucher households, this activity phases in SAFMR over multiple fiscal years in order to control for negative and unanticipated consequences, to make use of the latest research and market data, and to maintain a constant number of households served. Below are the principles and parameters the Agency used in developing this activity:

- (1) Maintain Number of Households Served
 - No decrease in capacity to serve the same number of households
- (2) Minimize Negative Impact
 - Minimize negative impact for existing households in low-cost neighborhoods
 - No disparate impact on protected classes, including locally recognized classes (sexual orientation, gender identity, veteran status, and age)
- (3) Make the SAFMR as easy to use as possible
 - Households and landlords have limited time and resources; program design should facilitate program implementation
- (4) Leverage the Value of the Voucher
 - Maximize value of vouchers in targeted growth areas and rapidly changing neighborhoods

Overview of Phases

| | Phase I | Phase II |
|----------------|---|--|
| Implementation | New Admissions & Moves: Oct 1, 2018 to Dec 31, 2019 | New Admissions & Moves: Jan 1, 2020 to present |



| | | |
|-------------------------------|--|---|
| | Recertifications & Interims: Nov 1, 2018 to Jan 31, 2020 | Recertifications & Interims: Feb 1, 2020 to present |
| Geography | 2 Tiers | 10 Groupings |
| Subsidy Cap | Subsidy cap for higher cost Tier | None |
| Voucher Payment Standard (PS) | MAFMRs Voucher PS set outside basic range | SAFMRs Voucher PS set outside basic range |
| Hold Harmless Policy | Hold harmless until clients enters into a new HAP contract | |
| Exception Overlay | Automatic for existing clients in identified areas Targeted geography | Automatic for movers only in identified areas Targeted geography |

Plan Year Update

This activity is ongoing. In general, the mechanics of this activity are performing as expected and enabling the Agency to respond to local market challenges. This fiscal year the Agency has experienced operational and administrative challenges in the housing choice voucher program that have impacted its ability to meet the activity metric benchmarks. These are discussed in section vi below.

All HUD standard metrics have met the benchmarks. Notably, HC #5 shows the percentage of new admissions and movers moving into higher cost groups has increased to 56%. The Agency anticipates that at some point in the near future, this figure will level off at which point the Agency would be interested in revisiting benchmarks.

SAHA metrics are not meeting expected results. Specifically, the Agency set a benchmark to maintain existing lease-up success rates and average search days across all groups. The Agency is seeing a decrease in lease-up success rates and an increase in average search days across the majority of groups.

Several of SAHA's metrics are used as monitoring metrics -- the Agency has not defined targets and is using the metrics to monitor HAP costs and concentration. The Agency continues to see average HAP across groups increase. In addition, the Agency is seeing sustained trends in decreasing HCV concentrations in lower cost groups and increasing HCV concentrations in higher cost groups relative to the overall county HCV concentration.

HUD Standard Metrics

| CE #1: Agency Cost Savings | | | | |
|----------------------------|----------|-----------|---------|-----------|
| Unit of | Baseline | Benchmark | Outcome | Benchmark |



| Measurement | | | | Achieved? |
|---|--|--|--|---|
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| | \$0 | \$0 | \$0 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

Note: The Agency does not anticipate any cost savings as a result of this activity. Staff workloads related to the application of the new payment standards is expected to remain the same.

| CE #2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |
| | 0 hours | 0 hours | 0 hours | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

Note: The Agency does not anticipate any cost savings as a result of this activity. Staff workloads related to the application of the new payment standards is expected to remain the same.

| HC #5: Increase in Resident Mobility | | | | |
|--------------------------------------|----------|-----------|---------|---------------------|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |



| | | | | |
|---|--|---|---|---|
| Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity (number). This number may be zero. | Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number). | Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Phase I (FY2019): "Better" defined as moving to Tier 2. | 25% (343) of existing voucher clients move to a unit in Tier 2 (FY2017) | More than 25% (~400) of existing voucher clients move to a unit in Tier 2 (FY2019) | 32% (353 movers + 348 new admissions) moved to a unit located in Tier 2 | Benchmark met |
| Phase II (FY2020 - present): "Better" defined as moving to Groups 4-10 | 41% (453 movers + 356 new admissions) moved to a unit located in Groups 4-10 | 41% (453 movers + 356 new admissions) moved to a unit located in Groups 4-10 | 56% (636 movers + 424 new admissions) moved to a unit located in Groups 4-10 | Benchmark met |

SAHA Metrics

| Lease-up Success Rate by Post-Move Tier | | | | |
|--|----------|-----------|---|--|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Percent of vouchers issued that were leased-up within 120 days | 89% | 89% | Group 1: 56% Group 2: 71% Group 3: 72% Group 4: 67% Group 5: 71% Group 6: 74% Group 7: 73% Group 8: 78% Group 9: 71% Group 10: 81% Group 1 - EO: 53% Group 2 - EO: 89% | This indicator is intended to help the Agency monitor whether anyone grouping is experiencing relatively lower lease up success rates that may or maynot be related to payment standards |

| Average # of days searching by Post-Move Tier | | | | |
|---|----------|-----------|---|--|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average number days between the date | 58 days | 58 days | Group 1: 85 Group 2: 75 Group 3: 64 Group 4: 71 Group 5: 67 | This indicator is intended to help the Agency monitor whether anyone grouping is experiencing relatively longer search |



| | | | | |
|---|--|--|--|--|
| the voucher is issued and the date the request for tenancy (RTA) is approved. | | | Group 6: 55 Group 7: 62 Group 8: 54 Group 9: 66 Group 10: 61 Group 1 - EO: 79 Group 2 - EO: 69 | times that may or maynot be related to payment standards |
|---|--|--|--|--|

| Average HAP by Tier | | | | |
|--|---|---|---|--|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average Housing Assistance Payment by Tier | Group 1: \$601 Group 2: \$608 Group 3: \$614 Group 4: \$620 Group 5: \$690 Group 6: \$603 Group 7: \$707 Group 8: \$847 Group 9: \$755 Group 10: \$876 Group 1 - EO: \$609 Group 2 - EO: \$591 | Group 1: \$601 Group 2: \$608 Group 3: \$614 Group 4: \$620 Group 5: \$690 Group 6: \$603 Group 7: \$707 Group 8: \$847 Group 9: \$755 Group 10: \$876 Group 1 - EO: \$609 Group 2 - EO: \$591 | Group 1: \$579 Group 2: \$600 Group 3: \$603 Group 4: \$615 Group 5: \$720 Group 6: \$646 Group 7: \$770 Group 8: \$1,149 Group 9: \$797 Group 10: \$1,021 Group 1 - EO: \$596 Group 2 - EO: \$608 | This indicator is a monitoring only indicator -- The Agency intends to use it to monitor HAP costs by Grouping |

| Households moving to a better neighborhood by Post-Move Tier | | | | |
|--|----------|-----------|---------|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Percentage of households <u>self-reporting</u> that they <i>consider the unit for which they submitted a request to be in a better neighborhood than their current place of residence</i> on post-move surveys (increase). | 87% | 87% | No data | Due to surveying challenges, the Agency is not able to report on this indicator |

| HCV Concentration by Tier | | | | |
|---|---|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| HCV households living in each Tier as a percentage of total renter households | Group 1: 8% Group 2: 8% Group 3: 10% Group 4: 3% Group 5: 2% Group 6: 3% Group 7: 2% Group 8: 0% | Group 1: 8% Group 2: 8% Group 3: 10% Group 4: 3% Group 5: 2% Group 6: 3% Group 7: 2% Group 8: 0% | Group 1: 7% Group 2: 8% Group 3: 9% Group 4: 3% Group 5: 2% Group 6: 3% Group 7: 2% Group 8: 1% | This indicator is a monitoring only indicator -- The Agency intends to use it to monitor voucher concentration by Grouping to determine whether long-term shift |



| | | | | |
|--|---|---|---|--|
| | Group 9: 1% Group 10: 1% Group 1 - EO: 0% Group 2 - EO: 0% | Group 9: 1% Group 10: 1% Group 1 - EO: 0% Group 2 - EO: 0% | Group 9: 1% Group 10: 1% Group 1 - EO: 0% Group 2 - EO: 0% | |
|--|---|---|---|--|

| Increase in Resident Stability | | | | |
|---|------------------------------|------------------------------|------------------------------|------------------------------|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of Existing voucher clients who moved from a lower cost tier to a higher cost tier who have stayed in place after year 1 | Forthcoming in FY2022 Report |

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection

- Baselines and benchmarks were reset using the modified ZIP code - Group assignments where appropriate.
- The Agency is not able to report FY2020 actuals for Households moving to preferred neighborhoods by Post-Move Tier. This metric relied on a survey and survey collection ended due to challenges in administering and overseeing administration of the survey during several staffing transitions. During FY2021, staff are reviewing the survey to make updates to questions and collection methodology in order to adapt to electronic processes in light of COVID-19 response. Additionally, staff have identified the need for two different types of surveys, a Post-Search survey and a Post-Move Survey, in order to record the full client experience in the move process. This work is currently on hold as the Agency addresses other challenges and priorities.
- The Agency is not reporting on its own metric Increase in Resident Stability as the Agency is waiting until Phase II has been in place for two years to allow for movers to stay in place for at least 1 year. This metric was anticipated to be reported this fiscal year, however, as a result of other challenges and priorities this work is also on hold.

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies:

As mentioned above, this fiscal year the Agency has experienced general operational and administrative challenges in the housing choice voucher program that have impacted its ability to meet the activity metric benchmarks. Administratively, the Agency continues to be impacted by staffing challenges such as retention, increased vacancies, and ongoing training needs. These challenges appear to be related to the ongoing pandemic and local workforce trends as well as long-term impacts of modified operations that resulted in the termination of temporary staff who were filling key vacancies as well as a hiring freeze. The Agency anticipates these issues will start to ease now that temporary staff are able to fill key vacancies and the hiring freeze is over.



Operationally, the voucher program is facing challenges as a result of the pandemic's impact on residents and landlords. The Agency is continuing to work with its partners, re-assess policies and procedures, and review payment standards to ensure we are responding programmatically in ways that minimize and/or mitigate pandemic-related challenges. In addition, the Agency is currently reviewing data and information on landlord retention and requests for voucher extensions to understand the barriers residents and landlords are facing.

The Agency is also engaging with city partners to identify housing search assistance resources for voucher holders who may need assistance leasing up with their voucher, identifying landlords that will accept their voucher, and general search assistance.

As part of the Agency's new five-year strategic plan, SAHA2025, a landlord outreach strategy has been identified and is currently being developed. The Agency will also be revisiting landlord outreach and mobility counseling during its FY2023 MTW Planning cycle.



FY2019-2 – Alternate Recertification Process (PH and HCV)

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended: This activity was proposed in the FY2019 MTW Plan and approved in June 2018. Implementation began July 1, 2019. Because SAHA meets with clients 120 days in advance of their certification date, the transition of the new policy was effective in full by November 1, 2018. For AHP, implementation began July 1, 2019. For PH, the new triennial schedule was implemented effective September 1, 2018 for new admissions and November 1, 2018 for recertifications.

ii. Description/Impact/Update/Rent Reform Hardships

This activity has three main components that are designed to streamline and simplify the recertification process: (1) alternate schedule, (2) alternate public housing review procedures, and (3) alternate income verification methods. It consolidates and updates three previously approved activities related to the first two elements (FY2014-4 Biennial Reexaminations, FY2014-5 Triennial Reexaminations, and FY2016-2 Biennial and Triennial Notification of Rent Type Option) and adds a new waiver for the third element.

(1) Alternate Recertification Schedule (PH and HCV)

This proposed activity establishes biennial and triennial schedules for reexaminations for the low income public housing and housing choice voucher programs. The Agency has been using alternative schedules since 2011; this new activity streamlines the schedules across both programs. The effective change will move approximately half of public housing households from biennials to triennials; the other half of public housing households will remain on the biennial schedule. The housing choice voucher program will maintain current reexamination schedules as established in FY2014 under FY2014-4/FY2014-5.

Every household will have the option of interim reexaminations if there is a change in household composition or income according to HCV and PH policy.

Beginning FY2016, SAHA created a local form with an expiration date of 39 months to replace the HUD-9886 Form with its 15 month expiration date. In the future, SAHA may create its own local forms with different expiration dates or other elements to accommodate this activity.

Definitions: For purposes of assigning a recertification schedule to each household, the Agency will utilize the following to apply the two schedules:

Triennial: A household is eligible for a triennial schedule if the household has at least one elderly or disabled household member and the household receives 100% of their income from fixed sources. SAHA defines fixed income as Social Security (SS), Supplemental Security Income (SSI), and/or pension.



Biennial: Households not eligible for a triennial schedule are eligible for a biennial schedule.

(2) Alternate PH Review Procedures (PH only)

Typically in the low income public housing program, PHAs are required to review community service requirements and inform public housing residents of the option of paying income-based rent or a flat rent on an annual cycle. Additionally, PHAs are obligated to conduct annual updates of family composition for these public housing families who have chosen to pay flat rent regardless of HUD-allowed triennial recertifications for those families.

As residents move to biennial and triennial recertification schedules, it becomes more efficient to coordinate notification and update requirements in accordance with their new recertification schedules. Therefore, SAHA proposes to conduct review procedures related to community service requirements, flat rent notice and family composition updates for PH individuals at the time of reexamination.

(3) Alternate Income Verification Methods (PH and HCV)

Currently, SAHA accepts self-certification for assets valued below \$5,000. In order to further streamline administrative processes, SAHA will accept the family's self-certification of the value of family assets and anticipated asset income for net assets totaling \$25,000 or less. Third-party verification of assets are still required for assets totaling a value more than \$25,000.

According to HUD's Verification Hierarchy, SAHA must send a form to third-party sources for verification of income if the tenant-provided documents are not acceptable or are disputed. In order to increase the rate of files completed in a timely manner, SAHA will skip the third-party verification form and instead use oral third party verification when tenant-provided documents are unacceptable.

In addition to streamlining methods of document verification, SAHA wanted to reduce the number of applicants re-submitting documents for approved extensions of voucher (if in HCV Program) and/or reasonable accommodations. SAHA has revised its policy to extend the length of time that applicant-provided documents would be valid for verification purposes. Applicant-provided documents dated within 90 calendar days from the eligibility appointment would be valid. This does not apply to permanent documents such as social security cards, birth certificates, and identification cards.

Both methods will apply to the low income public housing and housing choice voucher programs.

Plan Year Update

This activity is ongoing. The tables above compare the baselines and benchmarks for each metric. All outcomes have met the benchmarks and no explanation is therefore necessary.

HUD Standard Metrics

CE #1: Agency Cost Savings



| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|--|--|--|---|
| Total cost of task in dollars (decrease). Definition: Cost of staff time | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| | HCV: \$407,067 PH: \$201,964.50 Total: \$609,032 | HCV: \$161,845 PH: \$108,806 Total: \$270,651 Expected savings: 338,381 | HCV: \$121,134 PH: \$139,010 Total: \$260,144 Actual savings: \$348,888 | Benchmark met |

CE #2: Staff Time Savings

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|--|--|--|---|
| Total time to complete the task in staff hours (decrease). Definitions: Total time to complete recertifications during the fiscal year. | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |
| | HCV: 15,914 hours PH: 8,325 hours Total: 24,239 hours | HCV: 6,327 hours PH: 4,485 hours Total: 10,812 hours Expected savings: 13,427 hours | HCV: 4,736 hours PH: 2,468 hours Total: 260,144 hours Actual savings: 17,036 hours | Benchmark met |

CE #3: Decrease in Error Rate of Task Execution

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|--|--|--|---|
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of the activity (percentage). | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |
| | HCV: 16% PH: 45% | HCV: 16% PH: 40% | HCV: n/a due to Covid-19 PH: n/a due to Covid-19 | Benchmark not met. |

CE #5: Increase in Agency Rental Revenue



| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|--|--|--|---|
| Rental revenue in dollars (increase). | Rental revenue prior to implementation of the activity (in dollars). | Expected rental revenue after implementation of the activity (in dollars). | Actual rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| Definition: Total HAP + UAP Costs plus Total Rental Revenue from public housing residents | HCV: \$2,524,901 PH: \$948,394 Total: \$3,286,608 | No change expected | HCV: \$2,793,763 PH: \$969,983 Total: \$3,763,746 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None

vi. Challenges in Achieving Benchmarks and Possible Strategies: None



FY2020-1: Palo Alto College, College Homeless Assistance Program

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended

This activity was proposed in the FY2020 MTW Plan and approved in August 2019. Implementation planning with the partner began in FY2020 but was put on hold temporarily due to COVID-19. Early in FY2021, SAHA began receiving referrals from the partner agency.

ii. Description/Impact/Update/Rent Reform Hardships

This proposed activity would allow the Agency to set-aside up to 20 tenant-based housing choice vouchers for households referred by Palo Alto College (PAC). Palo Alto College has developed a three prong approach to engaging in the homeless college student dialogue that includes the following:

1. Development of pre-emptive interventions designed to help students avert homelessness through financial literacy and or financial planning and become knowledgeable about the community resources available through community partners.
2. Creation of emergency housing program funded through Palo Alto Colleges Emergency Aid Program (EAP) funded in part through the Trellis Corporation for students needing short term shelter between 1-3 days either through one of our CBO partners such as The Salvation Army or through MOU agreements with local hotels funded through EAP.
3. Housing Vouchers provided to Palo Alto College Students through the SAHA MTW flexibilities when students meet the eligible criteria for the College Housing Assistance Program.

Students seeking housing vouchers through the College Housing Assistance Program must meet the following criteria.

1. Prior to completing the Palo Alto College, College Housing Assistance Program voucher application students must complete an intake screening with staff from the Palo Alto College SHARE Center located in SC 101.
2. Students must complete a Palo Alto College, College Housing Assistance Program voucher application.
3. Students must have a home school of Palo Alto College and be enrolled in at least 6 credit hours at Palo Alto College in a degree or certificate program. If students have already been awarded a degree or certificate, then they are not eligible for the program unless approved by Dean/VPSS. While preference will be given to Palo Alto College students, students enrolled at any Alamo Colleges District institution may also be considered for assistance if capacity exists.
4. Students are required to move to full-time enrollment by their third semester in the program if not at full-time enrollment at the time of application.
5. Students may not be in arrears or owe funds to any housing authority.
6. Students must have a completed FAFSA on file.
7. Must have a cumulative PAC Grade Point Average of 2.0 or higher. If no GPA exists, then prior coursework will be reviewed on a case by case basis. Should a student not meet the GPA requirement, student may request an appeal for continued participation in the program.



8. May not be considered for the program until census day enrollment has been met upon which student may submit the College Housing Assistance Program voucher application.
9. Submit a brief 3-5 sentence statement explaining the circumstances around the students housing insecurity as it relates to the definition provided.
10. Student income may not exceed 30% of the area median income.
11. Consent to FERPA Release Statement on application. Student Waiver: By submitting this emergency grant request, I acknowledge and give consent for data to be shared with the Department of Housing and Urban Development, or their representatives, as part of College Housing Assistance Program. I understand that my information will not be sold for any purpose and will not be distributed to other parties. Examples of data shared include, but are not limited to: student name and ID, enrollment status, annual income, estimated family contribution, emergency request amount, emergency request type, date of birth, demographics, dependents, parental educational attainment, re-enrollment status etc.
12. Must meet with Financial Literacy Sr. Advisor for an advising session and/or participate in a financial coaching session/workshop. Dates, Times, and Locations are available at the SHARE Center in SC 101. Coaching session will be completed after the disbursement of the grant unless student is available and able to complete the coaching earlier.
13. Students must also meet federal requirements in order to be eligible for the program and must complete the San Antonio Housing Authority application process in order to be given full consideration.
14. Students have up to one semester after graduation to secure housing at which point students are no longer eligible for the housing voucher.
15. The housing voucher will cover a portion of the rent at any SAHA or non-SAHA unit as per see FY2014-6: HCV Rent Reform.
16. Completion of the Palo Alto College Housing Assistance Program does not guarantee access to or awarding of any housing voucher unless all requirements have been met for both the institution and SAHA.

Students receiving housing assistance through this set-aside must meet SAHA eligibility criteria for income levels, background check and lawful residency. Students will follow all other voucher policies including MTW rent calculations (see FY2014-6: HCV Rent Reform), MTW mandatory orientation (see FY2014-2: Early Engagement), MTW alternative payment standard schedules (see FY2019-1: Local Small Area Fair Market Rent Implementation), and MTW alternative examinations (see FY2019-2: Alternate Recertification Process (PH and HCV)).

In addition, this proposed activity is designed to meet the requirements of 24 CFR 5.612 and Section 211 of the Department of Housing and Urban Development Appropriations Act, 2019, which establish parameters within which Section 8 assistance can be provided to individuals enrolled as students in institutes of higher education. Per those parameters, SAHA will not provide assistance to any student who meets all of the following criteria:

- is under 24 years of age;
- is not a veteran;
- is unmarried;
- does not have a dependent child;
- is not a person with disabilities, as such term is defined in section 3(b)(3)(E) of the United States Housing Act of 1937 (42 U.S.C. 1437a(b)(3)(E)) and was not receiving assistance under such section 8 as of November 30, 2005;



- is not a youth who left foster care at age 14 or older and is at risk of becoming homeless; and
- is not otherwise individually eligible, or has parents who, individually or jointly, are not eligible, to receive assistance under section 8 of the United States Housing Act of 1937 (42 U.S.C. 1437f).

For purposes of determining the eligibility of a person to receive assistance under section 8 of the United States Housing Act of 1937 (42 U.S.C. 1437f), any financial assistance (in excess of amounts received for tuition and any other required fees and charges) that an individual receives under the Higher Education Act of 1965 (20 U.S.C. 1001 et seq.), from private sources, or an institution of higher education (as defined under the Higher Education Act of 1965 (20 U.S.C. 1002)), shall be considered income to that individual, except for a person over the age of 23 with dependent children.

If a student is determined to be independent from his/her parents, then the income of the student's parents will not be considered in determining the student's eligibility. One way for a student to be determined to be independent is to meet HUD's definition of independent child, which requires the individual to be verified during the school year in which the application is submitted as either an unaccompanied youth who is a homeless child or youth, or as unaccompanied, at risk of homelessness, and self-supporting by:

- 1) a local educational agency homeless liaison
- 2) the director of a program funded under Subtitle B of Title IV of the McKinney-Vento Homeless Assistance Act or a designee of the director; or
- 3) a financial aid administrator.

Rental leases executed under this program will follow standards as regulated by Section 8(o)(7) of the housing act and 24 CFR 982.308-982.310. While the Agency does not require standard HCV leases, the Agency does ensure leases include language per HUD regulations. The Agency [and its education partner] will work with the landlord to determine if the leases should have a one year or alternative term length to accommodate the school semester time frame. In addition, if SAHA terminates the HAP contract due to program violations the lease will automatically terminate. Upon completion of the program, clients will not be eligible for a traditional Housing Choice voucher. However, SAHA will continue to assess if there is a need for continued assistance and will consider a preference for the HCV wait list.

Plan Year Update

This activity is slightly behind plan, but is expected to get back on track in the coming fiscal year. Due to the continuing pandemic, Winter Storm Uri, as well as other unforeseen staffing circumstances with the partner, referrals and subsequent leasing have been slow to ramp up. At fiscal year end, this activity is serving six students within Palo Alto and expects to fill all the allocated vouchers in the coming fiscal year. For St. Phillips, the implementation was slightly delayed due to the previous plan to use project-based vouchers under 20-2 (which has been closed). In addition, the Agency focused on getting Palo Alto's program up and running so that any lessons learned could be applied to the St. Phillips partnership.



HUD Standard Metrics

| HC #1: Additional Units of Housing Made Available | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box. | Housing units of this type prior to implementation of the activity (number). This number may be zero. | Expected housing units of this type after implementation of the activity (number). | Actual housing units of this type after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Number of homeless college students receiving housing assistance and partner-provided services | 0 | 20 | 6 | Benchmark not met. |

| HC #7: Households Assisted by Services that Increase Housing Choice | | | | |
|--|--|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving services aimed to increase housing choice (increase). | Households receiving this type of service prior to implementation of the activity (number). This number may be zero. | Expected number of households receiving these services after implementation of the activity (number). | Actual number of households receiving these services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Number of homeless college students receiving housing assistance and | 0 | 20 | 6 | Benchmark not met. |



| | | | | |
|---------------------------|--|--|--|--|
| partner-provided services | | | | |
|---------------------------|--|--|--|--|

| SS#3: Increase in Positive Outcomes in Employment Status | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of work-able households in <<category name>> after implementation of the activity (number). | Actual head(s) of work-able households in <<category name>> after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero. | Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Whether the outcome meets or exceeds the benchmark. |
| Report the following information separately for each category: (1) Employed Full- Time (2) Employed Part- Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other | (1) Employed Full-Time: 1 (17%) (2) Employed Part-Time: 0 (0%) (3) Enrolled in an Educational Program: 6 (100%) (5) Unemployed: 3 (50%) | (1) Employed Full-Time: 1 (17%) (2) Employed Part-Time: 0 (0%) (3) Enrolled in an Educational Program: 6 (100%) (5) Unemployed: 3 (50%) | (1) Employed Full-Time: 1 (17%) (2) Employed Part-Time: 0 (0%) (3) Enrolled in an Educational Program: 6 (100%) (5) Unemployed: 3 (50%) | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

| SS #5: Households Assisted by Services that Increase Self Sufficiency | | | | |
|---|---------------------------------------|-------------------------------|--|--|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving | Households receiving self sufficiency | Expected number of households | Actual number of households receiving self | Whether the outcome meets or exceeds the |



| | | | | |
|---|--|--|---|--------------------|
| services aimed to increase self sufficiency (increase). | services prior to implementation of the activity (number). | receiving self sufficiency services after implementation of the activity (number). | sufficiency services after implementation of the activity (number). | benchmark. |
| Homeless College Student Households | 0 | 20 | 0 | Benchmark not met. |

| SS #6: Reducing Per Unit Subsidy Costs for Participating Households | | | | |
|--|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average amount of Section 8 and/or 9 subsidy (or local, non-traditional subsidy) per household affected by this policy in dollars (decrease) | Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). | Expected average subsidy per household affected by this policy after implementation of the activity (in dollars). | Actual average subsidy per household affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| Average amount of Section 8 and/or 9 subsidy per household | \$614.84 | \$614.84 | \$697.83 | Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set. |

SS #8: Households Transitioned to Self Sufficiency



| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|--|---|--|---|
| Number of households transitioned to self sufficiency (increase). | Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.. | Expected Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after to implementation of the activity (number). | Actual households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| Agency-wide Definition: PH household who is paying a flat rent for at least 6 months or a HCV household utilizing a zero HAP voucher for at least 6 months. | 0 | 0 in Year 1 | 0 | Benchmark met. |
| Student is able to secure housing without the housing voucher | 0 | 0 in Year 1 | 0 | Benchmark met. |

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None



vi. Challenges in Achieving Benchmarks and Possible Strategies: The Agency has learned that MTW programs administered in partnership with other agencies require more resources to coordinate the work and ensure the program can adapt to unforeseen circumstances including the pandemic, winter storm, and other administrative challenges resulting from those events. The Agency has dedicated those resources and continues to implement activity management practices with its partners.



FY2020-3: Family Self Sufficiency (FSS) Program Streamlining

MTW Statutory Objective(s): Reduce cost and increase cost effectiveness

i. Plan Year Approved, Implemented, Amended

This activity was proposed in the FY2020 MTW Plan and approved in August 2019. Implementation began in FY2020.

ii. Description/Impact/Update/Rent Reform Hardships

This activity is designed to create operational efficiencies in order to maximize engagement in the FSS program. The Agency has modified the FSS contract to be in alignment with housing program policy in the Housing Choice Voucher Administrative Plan and Public Housing Program Admissions and Occupancy Policy. Currently in the Agency's HCV program, a participant's TTP is calculated per the approved MTW activity, FY2014-6 Rent Simplification. This FSS-related waiver allows the Agency's FSS contracting process to be consistent with current and future PH and HCV alternative rent policies.

Plan Year Update

The Agency contracted 62 FSS participants during the fiscal year. This activity is on track. The tables below compare the baselines and benchmarks for each metric. As indicated in the table, the Agency has met the fiscal benchmark.

HUD Standard Metrics

| CE #1: Agency Cost Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after implementation of the activity (in dollars). | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
| Fss staff time multiplied by average salary + benefits | CE#2 multiplied by average wage + benefits \$536.46 | CE#2 multiplied by average wage + benefits \$130.05 | CE#2 multiplied by average wage + benefits \$130.05 | Benchmark met. |

| CE #1: Agency Cost Savings | | | | |
|----------------------------|----------|-----------|---------|---------------------|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |



| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |
|---|--|--|--|---|
| Total time to manually complete TTP calculation for FSS contracting multiplied by the total number of FSS enrollments | .33 hours multiplied by executed FSS contracts .33 X 62 20.46 hours | .08 hours multiplied by executed FSS contracts .08 X 134 4.96 hours | .08 hours multiplied by executed FSS contracts .08 X 134 4.96 hours | Benchmark met. |

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection:None

v. Actual Significant Changes: None

vi. Challenges in Achieving Benchmarks and Possible Strategies: None



FY2021-1: Next Step Housing Program (THRU Project)

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended

This activity was proposed in the FY2021 MTW Plan and implemented in FY2021.

ii. Description/Impact/Update/Rent Reform Hardships

The Agency is proposing to use its MTW flexibility to support a local partner, THRU Project, who provides supportive services to former foster youth.

Partner Program Overview

THRU Project's Next Step Housing Program is intended to change the way former foster youth are housed in order to reduce rates of homelessness¹. It will offer housing options and mandatory life-skills courses so that 10 vetted youth through non-institutionalized living will be unified with the community. This program will be an integral component for local foster youth, in their journey to productive independence. The program is specifically designed as a graduated, systematic approach geared towards one of our community's most vulnerable populations and creates opportunities for individual growth through skill building, practical life skills, support, and ultimately our most basic need; shelter. Each placement will focus on preparing the youth for living on their own while strengthening future families and breaking the negative cycles.

The THRU project will provide a range of services, including:

1. Housing search assistance
2. Life-skills course
3. Home visits by case manager
4. Access to employment specialist
5. Participants are also required to save a percentage of personal income, on a sliding scale, so that at the end of the one year they have at least \$2,500 in savings

Activity Overview

Currently, ten (10) modified project based vouchers have been allocated and committed to Woodhill Apartments to support this partnership as approved under FY2020 amendments to the FY2015-3 Modified Project Based Vouchers activity. To date, there have been no successful placements. After a post-implementation review, the Agency and partner have identified program design changes that require additional MTW waivers.

SAHA is proposing to contribute up to 36 months of housing assistance to support youth being served by the Next Step Housing Program. Below is a summary of how SAHA's housing assistance will provide support.

Year 1 (12 months)

- Youth are enrolled in the Next Step Housing Program and receive housing assistance from SAHA through a modified project based voucher at Woodhill Apartments.

¹ Youth may currently be in extended foster care.



- Youth will have rent calculated as prescribed in FY2014-6 Rent Reform and will also have their portion capped at \$100 -- SAHA will cover any additional tenant rent portion with increased housing assistance.
- Youth will have access to the modified project based unit and rent cap for one year only.
- SAHA will also waive the initial rent burden rule which states that when a family initially leases and the gross rent of the unit exceeds the applicable payment standard for the family, the dwelling unit rent must not exceed 40 percent of the family's adjusted income.

Years 2 and 3 (24 months)

- Once youth complete the first year (12 months) Next Step Housing Program, they will have the option of continuing on housing assistance with a traditional tenant based voucher provided by SAHA.
 - Youth must be recommended by the partner for continuance in the voucher program
 - Youth will have access to the tenant-based voucher for an additional 24 months and will benefit from the choice to remain at Woodhill Apartments or move to another housing unit within SAHA's jurisdiction.
 - Youth will have their tenant rent portion calculated as prescribed in FY2014-6: HCV Rent Reform (consolidates previously approved activities FY2014-6: Rent Simplification (HCV) and FY2015-4: Simplified Utility Allowance Schedule) and will NOT have their portion capped at \$100.

Alignment with other MTW activities

- Due to the nature of the program, youth will have an annual recertification every 12 months and will not follow alternative recertification processes established under FY2019-2: Alternate Recertification Process (PH and HCV).
- Youth admitted under this activity will follow the Agency's alternative implementation of small area fair market rents as established under FY2019-1: Local Small Area Fair Market Rent (SAFMR) Implementation.

ii. Describe how the proposed activity will achieve one or more of the three statutory objectives and the specific impacts on that statutory objective(s).

This activity is designed to meet the statutory objective of increasing housing choices. The housing assistance provided by the Agency is intended to allocate vouchers to youth aging out of foster care who are at risk of homelessness. The voucher provides the youth the ability to lease decent, safe, affordable housing in the private housing market.

Plan Year Update

This activity is behind schedule. At the end of FY2021, there was only 1 youth who successfully leased up, 1 RTA pending, and 1 referral being processed through the pre-application process. As a result, the Agency is not able to report on the metrics.

HUD Standard Metrics



| HC #1: Additional Units of Housing Made Available | | |
|---|--|---|
| Unit of Measurement | Baseline | Benchmarks |
| <i>Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.</i> | <i>Housing units of this type prior to implementation of the activity (number). This number may be zero.</i> | <i>Expected housing units of this type after implementation of the activity (number).</i> |
| # of additional units made affordable to youth aging out of foster care | 0 | Year 1: 10 youth Year 2: up to 20 Year 3 and beyond: up to 30 |

| HC #7: Households Assisted by Services that Increase Housing Choice | | |
|---|---|--|
| Unit of Measurement | Baseline | Benchmarks |
| <i>Number of households receiving services aimed to increase housing choice (increase).</i> | <i>Households receiving this type of service prior to implementation of the activity (number). This number may be zero.</i> | <i>Expected number of households receiving these services after implementation of the activity (number).</i> |
| # of youth aging out of foster care receiving services aimed to increase housing choice | 0 | Year 1: 10 youth Year 2: up to 20 Year 3 and beyond: up to 30 |

| SS #5: Households Assisted by Services that Increase Self Sufficiency | | |
|---|---|---|
| Unit of Measurement | Baseline | Benchmarks |
| <i>Number of households receiving services aimed to increase self sufficiency (increase).</i> | <i>Households receiving self sufficiency services prior to implementation of the activity (number).</i> | <i>Expected number of households receiving self sufficiency services after implementation of the activity (number).</i> |
| # of youth aging out of foster care receiving services aimed to increase self sufficiency | 0 | Year 1: 10 youth Year 2: up to 20 Year 3 and beyond: up to 30 |

Data Source: This is tracked through data collection on the MTW-50058 in the Agency's Housing Information System. All students served in this program will receive these services.

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None

vi. Challenges in Achieving Benchmarks and Possible Strategies: This program is small and operated in partnership with a small local non-profit organization. A number of challenges have impacted this activity including: youth not liking the current property where PBVs are committed and long commutes between the property and their college. These challenges coupled with the ongoing pandemic and recent Winter Storm Uri have resulted in low enrollment. The Agency is reviewing the activity to identify possible solutions.



FY2021-2: Limiting increases in rents

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended

This activity was proposed in the FY2021 MTW Plan and implemented in February 2022.

ii. Description/Impact/Update/Rent Reform Hardships

This activity uses MTW flexibility to limit voucher contract rent increases to no more than 3%, in order to prevent terminations or evictions, and maintain a constant and predictable tenant rent. The Agency arrived at 3% by conducting a historical rent increase analysis. This activity will be sunsetted after 24 months, or sooner, if the national funding situation improves, and the agency is able to meet MTW requirements of serving substantially the same number of households.

Background

As a result of the pandemic, we have seen historic levels of unemployment claims in San Antonio and throughout the country. SAHA has seen a spike in reports of loss of income from residents. At the same time, landlords are seeking to increase rents. The agency is concerned this will negatively impact tenants as SAHA may cover part of the increase (up to the payment standard) but tenants more than likely will receive an increase in their rent portion.

Plan Year Update

This activity was implemented in FY2021 and the policy became effective on February 1, 2021. The Agency focused the first part of the fiscal year preparing for implementation by developing a new rental increase database and tracking system and conducting training.

During the six month of implementation, the Agency received a total of 1,199 rental change requests and processed 265 or 22%. Of those processed, 91% were approved, 7.5% were denied due to non-rent comparable reasons (ie, missing signatures, incomplete paperwork, initial year of lease up), and 4 or 1.5% were denied due to the rent comparable not supporting the requested change.

This MTW Activity has benefited 115 clients to date by capping their rent increases to no more than 3%. Under regular policy, the average rent percent increase for these households would have been nearly 8%. Under the new policy, the average increase in rent for these households was \$26 versus \$70 without the cap.

This is the first reporting year of the activity -- the baselines and benchmarks have been set using actuals from this year.

B. ACTIVITY METRICS INFORMATION

HUD Standard Metrics



| HC #4: Displacement Prevention | | | | |
|--|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box. | Households losing assistance/moving prior to implementation of the activity (number). | Expected households losing assistance/moving after implementation of the activity (number). | Actual households losing assistance/moving after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| # of households that experience a rent increase above 3% | 230 households (115 for the first 6 months, assuming twice that for a year) | 230 households | 115 households whose landlord requested a rent increase above 3% during the 6 month implementation period | NA - benchmark set during implementation year |

SAHA Metrics

| Average Rent Increase | | | | |
|-----------------------|---------------------------------------|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average rent increase | Average rent increase without the cap | Average rent increase with the cap. | Average rent increase with the cap. | Whether the outcome meets or exceeds the benchmark. |
| Average rent increase | \$70.16 average requested increase | \$26.30 average accepted rent increase | Average \$26.30 increase in contract rent for 115 households | NA - benchmark set during implementation year |

iii. **Actual Non-Significant Changes:** None

iv. **Actual Changes to Metrics/Data Collection:** None

v. **Actual Significant Changes:** None

vi. **Challenges in Achieving Benchmarks and Possible Strategies:**

During the first six months of implementation, over 30% of landlords who requested a rent increase, requested it more than one time. Of all the requests made, over 50% of them were for more than a 3% increase in rent. The Agency still has a majority of requests pending and is working to address staffing shortages so that these requests can be processed as quickly as



possible. The voucher program has experienced higher staff turnover during the last fiscal year which has led to delays in getting new staff hired and onboarded to process these requests.

Over the next several months, as part of the annual planning cycle, the Agency will be reviewing additional local rental data and information to determine if changes should be made to ensure this activity is as effective as it can be. Changes being currently discussed include limiting the number of requests landlords can make within a specific time period and pegging the cap to stable local rental increase data.



A. Activities on Hold

FY2020-4: Time-Limited Workforce Housing Pilot Program (PBV)

MTW Statutory Objective(s): Promote Self-Sufficiency

i. Plan Year Approved, Implemented, Amended

The Activity was approved in the FY2020 MTW Plan. It has not been implemented.

ii. Description/Impact/Update/Rent Reform Hardships

This pilot is supported by the Agency's current modified PBV activity (FY2015-3) through a commitment of fifty (50) project-based vouchers at St. John's Square.

The pilot project (max 50 households) for working residents provides time-limited housing assistance at selected sites where MTW modified PBVs have been committed. Working households at 50% of the area median income and who do not exceed 80% of the area median income, who choose to apply would receive five (5) years of housing assistance, with a two year extension if needed based on hardship.

SAHA will partner with SA Works to help provide a pipeline of both employers in the area and individuals to fill the units. SAHA would work directly with SA Works and the participating employers to not only ensure the units are filled, but also to create a career path for program participants. A separate waitlist would be created for those individuals who qualify for the program.

SAHA will work with the following partners to implement this initiative: local workforce partners (Project Quest, Goodwill Industries, Workforce Solutions Alamo), local employers (such as hospitals, restaurants, hotels), and a local developer. The partners will execute an MOU that outlines the roles and responsibilities for each party.

SAHA will also hire a Resident Services Coordinator to work with and mentor program participants to improve retention and success rates for the program. This position will be funded through the operations of the development at a cost of \$60,000 a year to include benefits.

Hardship policies: SAHA can extend the term of the assistance up to two (2) years if the family provides a written request for an extension and SAHA finds that good cause exists for the extension.

Program Qualifications:

Participants would be responsible to pay their portion of rent as calculated FY2014-6: HCV Rent Reform and would be required to meet with the SAHA Resident Services Coordinator, to assist with career opportunities and advancement. Participants would also be required to be employed by one of the employers participating with SAHA's partner for this program, SA Works. The program would also require participants to commit to career paths provided by their employers in their respective fields in order to further increase their salaries.

Potential clients will be referred to by either the partner employers or workforce partners to the Resident Services Coordinator who will then determine eligibility. The Resident Services Coordinator will work with property management to ensure annual eligibility and to determine



any hardship cases. Property management will also be responsible for compliance adherence and reporting.

All potential residents must attend SAHA's Early Engagement Program or demonstrate that they have attended the following SAHA approved classes: Financial Literacy, Housekeeping or How to be a good tenant, Conflict Resolution, and Tenant's Rights and Obligations. Potential resident must demonstrate that they have been employed a minimum of 90 days with the existing employer.

Partner employers must demonstrate that the potential resident is on a career path, such as their management programs, to detail how the resident will advance and achieve self-sufficiency within the five (5) year limit of housing assistance. SAHA, the respective workforce partners, the employer, and the resident will execute a contract that details the resident goals that could include the following:

1. **Financial/Asset Building:** Opening and maintaining Checking and Savings Accounts; Household has saved at least 3 months of monthly expenses, Improving Credit Scores to qualify for market rate housing and/or homeownership; secure reliable transportation
2. **Employment/Retention/Advancement:** Maintains employment with the existing employer through the duration of the contract or with another employer within the existing industry; advances within the set career path plan set forth by employer
3. **Income:** Increase income throughout the contract period and achieve 80% AMI at or before the end of the 5 year limit
4. **Education/Training:** Secure High School Diploma or GED; secure post secondary degree(s); complete industry recognized certifications; if needed, complete English As a Second Language Program

All participating residents must maintain good standing and meet with the Resident Services Coordinator on a monthly basis to report the progress of the goals.

Participants will follow all other voucher policies including MTW rent calculations (see FY2014-6: HCV Rent Reform), MTW mandatory orientation (see FY2014-2: Early Engagement), and MTW alternative examinations (see FY2019-2: Alternate Recertification Process (PH and HCV)).

Plan Year Update

The Agency anticipates to begin implementation in FY2023/24. St. John's Square has been identified as the property. This new development is currently in the pre-development phase and has experienced some delays in financing. Once the development closes, the Agency will begin implementation of the pilot to include hiring the Resident Services Coordinator, executing agreements with the partners, and further program development.

| SS #1: Increase in Household Income | | |
|--|---|---|
| Unit of Measurement | Baseline | Benchmarks |
| Average earned income of households affected by this policy in dollars (increase). | Average earned income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy prior to implementation of the |



| | | |
|-------------------------------------|-------------------|------------------------|
| | | activity (in dollars). |
| Average earned income of households | TBD at enrollment | TBD at enrollment |

Data Source: This will be tracked in the Agency's Case Management Information System

| SS#3: Increase in Positive Outcomes in Employment Status | | |
|---|--|---|
| Unit of Measurement | Baseline | Benchmarks |
| Average amount of savings/escrow of households affected by this policy in dollars (increase). | Average savings/escrow amount of households affected by this policy prior to implementation of the activity (in dollars). This number may be zero. | Expected average savings/escrow amount of households affected by this policy after implementation of the activity (in dollars). |
| Report the following information separately for each category: <ol style="list-style-type: none"> 1. Employed Full- Time 2. Employed Part- Time 3. Enrolled in an Educational Program 4. Enrolled in Job Training Program 5. Unemployed 6. Other | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of work-able households in <<category name>> after implementation of the activity (number). |
| | Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero. | Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent). |
| <ol style="list-style-type: none"> 1. Employed Full- Time 2. Employed Part- Time 3. Enrolled in an Educational Program 4. Enrolled in Job Training Program 5. Unemployed 6. Other | TBD at enrollment | TBD at enrollment |

Data Source: This will be tracked in the Agency's Case Management Information System

| SS #5: Households Assisted by Services that Increase Self Sufficiency | | |
|--|--|--|
| Unit of Measurement | Baseline | Benchmarks |
| Number of households receiving services aimed to increase self sufficiency (increase). | Households receiving self sufficiency services prior to implementation of the activity (number). | Expected number of households receiving self sufficiency services after implementation of the activity (number). |
| Households served by program | 0 | 50 |

Data Source: This will be tracked in the Agency's Case Management Information System



| SS #6: Reducing Per Unit Subsidy Costs for Participating Households | | |
|--|---|---|
| Unit of Measurement | Baseline | Benchmarks |
| Average amount of Section 8 and/or 9 subsidy (or local, non-traditional subsidy) per household affected by this policy in dollars (decrease) | Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). | Expected average subsidy per household affected by this policy after implementation of the activity (in dollars). |
| Average amount of Section 8 and/or 9 subsidy per household | \$614.84 | 0 by year 5 |

Data Source: This will be tracked through data collection on the MTW-50058 in the Agency's Housing Information System.

| SS #8: Households Transitioned to Self Sufficiency | | |
|---|--|--|
| Unit of Measurement | Baseline | Benchmarks |
| Number of households transitioned to self sufficiency (increase). | Households transitioned to self sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero.. | Expected Households transitioned to self sufficiency (<<PHA definition of self- sufficiency>>) after to implementation of the activity (number). |
| Agency-wide Definition: PH household who is paying a flat rent for at least 6 months or a HCV household utilizing a zero HAP voucher for at least 6 months. | 0 | 0 in Year 1 |
| Households who are able to successfully transition out of assisted housing in five years or less | 0 | 0 in Year 1 |

Data Source: This will be tracked in the Agency's Case Management Information System

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None

vi. Challenges in Achieving Benchmarks and Possible Strategies: None



B. Closed Out Activities

FY2014-2 – Early Engagement (previously referred to as Path to Self-Sufficiency)

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended This activity was approved in FY2013 and implemented in January 2014

ii. Explain why the MTW activity was closed out: Effective March 16, 2020, the Agency implemented its [Workplace Transition Plan](#), Transition Level 1, Emergency Operations. On June 22, 2020 the Agency transitioned to Level 2, Modified Operations. As a result, all EEP sessions were cancelled. The last EEP session was held in February 2020. The Agency began planning to convert the program to a virtual offering but was not able to complete due to resource constraints and the ongoing impacts of the pandemic and Winter Storm Uri.

While this activity has increased the Agency's ability to easily outreach to households for self-sufficiency programs and partner referrals, it continues to not meet the goal of decreasing negative exit rates. The Agency plans to continue its work on identifying additional interventions that can help address negative exits outside the scope of this activity.

In addition, the Agency has shifted its focus on how to eliminate barriers for residents including requirements to attend these sessions in order to receive housing assistance. The Agency is exploring alternative ways to offer services in a more resident-focused manner.

iii. In the Plan Year that the MTW activity is closed out provide the following:

- Discussion of the final outcome and lessons learned: The Agency hosted Early Engagement sessions from 2014 to 2020 with over 11,000 households completing the program. The original intent of the activity was to address the challenge of residents waiting years on the waitlist only to receive assistance and then lose the assistance shortly thereafter for negative reasons. Over the years, the Agency learned that the impact of the program was not achieving the original goal.
 - Lessons learned include:
 - Logistics: Event planning took more resources than the Agency had anticipated -- coordinating with partners and various internal departments on curriculum development, securing event space, and coordinating with operations departments on changing policies and housing assistance administration.
 - Flexibility: Because of the program design and resource intensive planning, the Agency was challenged with not having the capacity to offer more flexibility that could meet the needs of residents including: childcare,



evening and weekend sessions, transportation, and even various delivery methods for varied learning styles.

- Assumptions: The original assumption the Agency was testing was whether engaging residents when they first received housing assistance would prevent negative exits. After several years of annual internal reviews of this activity as well as negative exit data, the Agency has learned that this activity is not designed in a way that can help the Agency achieve its goal.
- Data: This activity has led to vast improvements in tracking reasons for why households exit our programs. When this activity was implemented the Agency had some data but it was not consistent or high quality. Now that we have better data, we are able to understand why people are leaving and develop interventions specific to those reasons -- including reviewing and revising our policies and procedures.
- Description of any statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit to the MTW activity (if applicable): None
- Summary table listing outcomes from each year the MTW activity was implemented (if applicable).

Results to date:

| Metric | Baseline | Target | FY14 | FY15 | FY16 | FY17 | FY18 | FY19 | FY20 ³ |
|---|----------|--------|-------|-------|-------|-------|-------|-------|-------------------|
| HC#7 Housing Choice (HH completing EEP) | 0 | 700 | 1,035 | 1,482 | 1,587 | 1,521 | 1,969 | 2,537 | 1,132 |
| PH Negative Program Exits (monthly average) ¹ | 41 | 37 | 43 | 28 | 36 | 39 | 39 | -- | -- |
| AHP Negative Program Exits (monthly average) ¹ | 44 | 40 | 71 | 47 | 62 | 65 | 46 | -- | -- |
| Non-EEP Negative Exit Rate ² | | | | | | | 46% | 56% | 37% |
| EEP Negative Exit Rate ² | 39% | 39% | | | | | 39% | 44% | 28% |

¹ Captures FY Q4 average; metric removed from reporting effective FY2019

² Metric added in FY2018 Report



³ Covid impacted Mar-Jun data. As a result, attendance is lower due to cancelled EEP sessions and negative exit rates are lower due to the suspension of evictions and terminations.

FY2017-1 – Thrive in Five

(formerly referred to as Time Limited Working Referral Program)

MTW Statutory Objective(s): Promote Self-Sufficiency

i. Plan Year Approved, Implemented, Amended: This activity was approved in December 2016 and implemented in FY2017. The activity was re-proposed to replace a previous pilot which was closed out in FY2016 (FY13-1 Limited Working Preference).

ii. Explain why the MTW activity was closed out: The Agency has determined the current program design that includes a time limit and work requirement is no longer tenable. The activity was off schedule and not meeting benchmarks. As a result of a shift in prioritizing housing as a human right, the Agency is refocusing on residents services that eliminate barriers and ensure housing stability. The currently enrolled households will no longer be subject to the time limit and work requirements. These households will continue to have access to SAHA's supportive service programs including FSS. Households will be notified of this change in writing as well as by direct communication from their current case manager.

iii. In the Plan Year that the MTW activity is closed out, provide the following:

- Discussion of the final outcome and lessons learned.
 - This activity was designed to test policies that were being discussed at the national scale including time limits and work requirements to see if they were effective for our community and residents. Ultimately, the activity did not achieve the intended outcome of enabling the agency to assess the efficacy of time limits and work requirements.
 - The time limit was set to five years. The Agency learned that this is not long enough for a household to achieve a living wage and rent in the private market.
 - While the activity was challenged prior to the pandemic, the continuing impacts of the pandemic and Winter Storm Uri demonstrate these policies are not consistent with the agency's shift in priorities. The Agency is refocusing on resident services that eliminate barriers to housing stability.
 - Public Housing Preference: This element of the design was more difficult to implement than originally anticipated. While households were able to jump to the top of the waiting list, the households still had to wait in “property pools”.
 - Limited Housing Choice: The Agency public housing stock is concentrated in specific areas of San Antonio. In some cases, applicants could not find a public housing property in the area they wanted to live or the area that would allow their children to continue in their current school.
 - Dual Case Management: The Agency was striving to leverage a dual case management model with its partner. This was ultimately unsuccessful as a result of



competing program requirements that were connected to specific program funding.

- Description of any statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit to the MTW activity (if applicable): None
- Summary table listing outcomes from each year the MTW activity was implemented (if applicable).

| Results to date: | | | | | | |
|--|----------|--------------------------------------|--|--|--|--|
| Metric | Baseline | Target | FY18 | FY19 | FY20 | FY21 |
| SS#1 HH Income (working only) | \$12,500 | \$4,700 annual increase (\$36k @5yr) | Combined: \$16,222 Cohort 1: \$18,604 Cohort 2: \$10,982 | Combined: \$17,344 Cohort 1: \$19,502 Cohort 2: \$14,818 Cohort 3: \$17,713 | Combined: \$14,409 Cohort 1: \$21,212 Cohort 2: \$12,056 Cohort 3: \$13,410 Cohort 4: \$10,957 | Combined: \$15,235 Cohort 1: \$21,212 Cohort 2: \$14,508 Cohort 3: \$14,625 Cohort 4: \$10,597 |
| SS#3.6 Other (Employment - NEND only) | 75% | 100% | Combined: 62% Cohort 1: 73% Cohort 2: 45% | Combined: 74% Cohort 1: 55% Cohort 2: 88% Cohort 3: 88% | Combined: 47% Cohort 1: 60% Cohort 2: 63% Cohort 3: 25% Cohort 4: 38% | Combined: 47% Cohort 1: 67% Cohort 2: 67% Cohort 3: 14% Cohort 4: 38% |
| SS#4 TANF¹ | 0 | 0 | 1 | 2 | 5 | 4 |
| SS#5 Assisted (HH at FYE) | 23 | Y1: 100 Y2: 200 | Combined: 26 Cohort 1: 15 Cohort 2: 11 | Combined: 27 Cohort 1: 11 Cohort 2: 8 Cohort 3: 8 | Combined: 34 Cohort 1: 10 Cohort 2: 8 Cohort 3: 8 Cohort 4: 8 | Combined: 30 Cohort 1: 9 Cohort 2: 6 Cohort 3: 7 Cohort 4: 8 |
| SS#6 Per Unit Subsidy* | \$283.17 | \$283.17 | \$303.25 | \$332.08 | \$345.61 | \$363.58 |
| SS#7 Revenue* | \$160.92 | \$160.92 | \$175.35 | \$208.07 | \$147.97 | \$167.67 |
| SS#8 SS | 0 | 1 | Combined: 0 Cohort 1: 0 Cohort 2: 0 | Combined: 0 Cohort 1: 0 Cohort 2: 0 Cohort 3: 0 | Combined: 1 Cohort 1: 1 Cohort 2: 0 Cohort 3: 0 Cohort 4: 0 | Combined: 1 Cohort 1: 1 Cohort 2: 0 Cohort 3: 0 Cohort 4: 0 |
| HC#3 Wait time (months) | 12 | 2 | Cohort 2: 2-6 months | 3.3 Months | 8.8 months | NA |
| Hardship Rate | 0 | 0 | 0 | 0 | 0 | 0 |

*HUD required metric: Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

¹ Captures number of households with TANF income as of reporting period snapshot

² FY15 report set long-term target to 40 by FY2018



FY2017-2 – Restorative Housing Pilot Program

MTW Statutory Objective(s): Promote self-sufficiency

i. Plan Year Approved, Implemented, Amended: This activity was approved in December 2016 and implemented in May 2017.

ii. Explain why the MTW activity was closed out: This pilot was originally scheduled to run for two years. Due to low enrollment, the Agency extended the pilot to allow time to address low enrollment. As of the end of FY2020, no new probationers were enrolled. As a result, the Agency decided to close out this activity in FY2021. The households that were enrolled will no longer be required to participate in supportive services. These households will continue to have access to SAHA's supportive service programs including FSS as well as their housing assistance. Households have been notified of this change directly by their current case manager.

iii. In the Plan Year that the MTW activity is closed out, provide the following:

- Discussion of the final outcome and lessons learned.
 - The program was designed to test if prioritized access to housing would support local partners' work in reducing recidivism among probationers. Due to low enrollment, the Agency was not able to fully test this; however, the Agency was able to enroll four probationers. As of the writing of this report, all four are no longer on probation.
 - Public Housing Preference: This element of the design was more difficult to implement than originally anticipated. While households were able to jump to the top of the waiting list, the households still had to wait in “property pools”. Because the pilot’s design relied on more timely housing needs being met, many referrals were able to find non-public housing accommodations.
 - Limited Housing Choice: The Agency public housing stock is concentrated in specific areas of San Antonio. In some cases, applicants could not find a public housing property in the area they wanted to live or in an area that might present additional challenges during their rehabilitation.
 - Partner coordination: The success of partner coordination requires more investment in resources than originally anticipated. For example, the Agency has an annual policy cycle which results in changes to program policies followed with training. Partner agencies often operate similar cycles. Keeping staff trained and informed on these changes as well as onboarding new staff proved to be a challenge when coordinating on small pilot programs.
- Description of any statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit to the MTW activity (if applicable): None
- Summary table listing outcomes from each year the MTW activity was implemented (if applicable): Not applicable.



FY2020-2: St. Phillips College Homeless Program (SPC-HP)

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended

This Activity was proposed and approved in the FY2020 MTW Plan. It has not been implemented.

ii. Explain why the MTW activity was closed out: The Agency is no longer pursuing the tiny homes development. The Agency is currently working with the partner to implement a College Homeless Assistance Program using the framework set out in FY 2020-1 that leverages tenant-based vouchers instead of project-based vouchers.

iii. In the Plan Year that the MTW activity is closed out, provide the following:

- Discussion of the final outcome and lessons learned: None, the activity was never implemented.
- Description of any statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit to the MTW activity (if applicable): None
- Summary table listing outcomes from each year the MTW activity was implemented (if applicable): Not applicable.

Closed out in Prior Years

FY2011-1- Block grant funding with Full Flexibility

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.

FY2011-1a- Promote Education through Partnerships

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.

FY2011-1b- Pilot Child Care Program

Closed out in FY2013 Report.

FY2011-1c- Holistic Case Management

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.

FY2011-1d- Resident Ambassador Program

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.



FY2011-2- Simplify and streamline HUD approval process for the development, redevelopment, and acquisition of PH

Closed out in FY2013 Report.

FY2011-3- Biennial reexamination for elderly/disabled (PH)

Closed out in FY2013 and replaced with FY2014-4.

FY2011-4- Streamline methods of verification for PH and HCV

Closed out in FY2013 and replaced with FY2014-1.

FY2011-5- Requirements for acceptable documents for PH and HCV

Closed out in FY2013 and replaced with FY2014-1.

FY2012-10- Biennial Reexamination for Elderly/Disabled Participants on Fixed Income (HCV)

Closed out in FY2013 and replaced with FY2014-4.

FY2012-11- Local Project Based Voucher Program for Former Public Housing Residents

Closed out in FY2013 before implementation due to discussions with HUD regarding the Rental Assistance Demonstration Program.

FY2011-6 – Commitment of Project-Based Vouchers (PBV) to SAHA-owned or controlled units with expiring subsidies (HCV)

Closed out in FY2014 and replaced with FY2015-3 Modified Project-Based Vouchers.

FY2011-7 – Remove limitation of commitment on PBV so that PBV may be committed to more than 25% of the units in family developments without required provision of supportive services (HCV)

Closed out in FY2014 as the Agency is no longer be seeking authorization to commit more than 25% of units at any one development to PBV without the provision of supportive services. The Agency offers supportive services pursuant to Low Income Housing Tax Credit (LIHTC) requirements for existing new development projects.

FY2011-8 – Revise Mobility Rules

Closed out in FY2014 and replaced with FY2015-3 Modified Project-Based Vouchers.

FY2013-2 – Simplified Earned Income Disregard (S-EID) - Only HCV Closing Out



Closed out in FY2014 as the activity was never implemented and the housing program has shifted resources to the successful implementation of the Rent Simplification (FY2014-6) and the MDRC/HUD Rent Reform Activity (FY2015-1).

FY2014-1 – Streamline Reexamination Requirements and Methods (HCV)

Closed out in FY2015 due to PIH Notice 2010 - 19 (HA) which gives housing authorities authorization without the need for an MTW waiver.

FY2013-1 – Time-limited Working Household Preference Pilot Program

Closed out in F2016 and replaced with FY2017-1 to incorporate lessons learned from this pilot

FY2013-3 – Standardize Section 8 and Public Housing Inspection Process

Closed out in FY2016. This activity was designed to unify Section 8 and Public Housing inspection standards. This activity was on hold, pending results of HUD tests at other PHAs. HUD has completed the study and is now conducting a demonstration. SAHA has no plans to participate in the demonstration and will implement new inspection standards for Section 8 in accordance with any new guidelines set forth by HUD.

FY2014-4 – Biennial Reexaminations (HCV and PH)

FY2014-5 – Triennial Reexaminations (HCV)

FY2016-2 – Biennial and Triennial Notification of Rent Type Option

Both the Biennial and Triennial activities were approved in FY2014 and implemented in January 2014. FY2016-2 was approved and implemented in FY2016. All three activities were closed out IN FY2018 and replaced with the approved FY2019-1 Alternative Recertification Process. FY2019-2 has three main components that are designed to streamline and simplify the recertification process: (1) alternate schedule, (2) alternate public housing review procedures, and (3) alternate income verification methods. It consolidates and updates three previously approved activities related to the first two elements (FY2014-4 Biennial Reexaminations, FY2014-5 Triennial Reexaminations, and FY2016-2 Biennial and Triennial Notification of Rent Type Option) and adds a new waiver for the third element. In addition, reporting cost savings on each of these activities is confusing and redundant. The new activity will track the cost savings of the streamlined recertification process across both programs and all households.



V. Sources and Uses of Funds

A. Sources and Uses of MTW Funds

i. Actual Sources of MTW Funds in the Plan Year

The MTW PHA shall submit unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA), or its successor system.

As a block grant agency, SAHA combines PH, HCV, and Capital Fund Program (CFP) funds into a single fund with full funding flexibility.

Sources of MTW Funds include the following:

- HCV Block Grant funding from HUD
- PH Operating Subsidy from HUD
- PH Rental and Other Income represents amounts collected from residents of our PH communities for rents and other miscellaneous charges
- PH CFP (including DDTF) Grants from HUD

ii. Actual Uses of MTW Funds in the Plan Year

The MTW PHA shall submit unaudited and audited information in the prescribed FDS format through the FASPHA, or its successor system.

Other than traditional uses for the MTW programs, consistent with the MTW plan, funds were obligated and expended to provide funding for the following:

| Projects | Cumulative Expenditure Balance as of 6/30/2021 |
|------------------------------------|---|
| Community Development Initiatives | \$ 1,438,829 |
| Public Housing Operating Loss | 973,614 |
| Capital Planning | 359,742 |
| Expansion of Public Housing Wifi | 451,993 |
| Development Activities: | |
| East Meadows Development | 668,629 |
| Legacy at Alazan | (52,510) |
| 100 Labor Multi-Family Development | 3,786,280 |
| Rosemont at Highland Park | 1,000,000 |
| Costa Valencia | 328,284 |
| Total | \$ 8,954,861 |

iii. Describe Actual Use of MTW Single Fund Flexibility

The MTW PHA shall provide a thorough narrative of actual activities that use only the MTW single fund flexibility. Where possible, the MTW PHA may provide metrics to track the outcomes of these programs



and/or activities. Activities that use other MTW authorizations in Attachment C and/or D of the Standard MTW Agreement (or analogous section in a successor MTW Agreement) do not need to be described here, as they are already found in Section (IV) of the Annual MTW Report. The MTW PHA shall also provide a thorough description of how it used MTW single fund flexibility to direct funding towards specific housing and/or service programs in a way that responds to local needs (that is, at a higher or lower level than would be possible without MTW single fund flexibility).

ACTUAL USE OF MTW SINGLE FUND FLEXIBILITY

Below are specific program uses of the moving to work funds that are not covered by other authorizations reported in other sections of this report.

- **Community Development Initiatives:** The Agency uses moving to work funds to support the Community Development Initiatives Department for MTW program administration and implementation. These funds allow the Agency to provide higher quality supportive services to residents than would otherwise be permitted by grant funding alone. In addition, the Agency is able to more effectively engage with partners and leverage resources for the benefit of the residents.

Detailed below is more information on specific uses and programs.

- **Case Management Software:** MTW funds were used to procure a new case management software, Apricot.
- **Food Distributions:** MTW funds were used to assist with food distributions as a result of the ongoing pandemic and in response to Winter Storm Uri.
- **Community Resources Team:** MTW funds were used to support the reorganization of the Community Development Initiatives Department to include a community resources team.
- **Jobs Plus Program:** MTW funds were used in addition to grant funds to support the administration of the Jobs Plus Program at Cassiano Homes. The Jobs Plus program helps residents receive training and find employment opportunities. SAHA partners with Alamo Workforce Solutions to identify in-demand occupations, as well as employers willing to provide training or educational assistance.
- **Resident Ambassador:** MTW funds also support the Resident Ambassador Program which provides meaningful work experience for residents. SAHA has found that this program is an effective strategy to engage all residents in educational, training, workforce development, and other self-sufficiency programs.
- **ConnectHomeSA:** The Agency uses MTW funds to support ConnectHomeSA. This program provides computer training courses. When residents complete six courses they earn a digital device.



- **Choice Endowment:** MTW funds were used in conjunction with grants fund to continue supportive services to residents as part of the Choice Neighborhood Initiative.

MTW030, MTW037, MTW040 - East Meadows Development: MTW funds were used to support the Master Development Agreement for the redevelopment of Wheatley Courts and the surrounding Eastside neighborhood. The Agency used these funds for the design and implementation of public improvements.

MTW032 - Development of Alazan Lofts: In 2017 SAHA purchased 18 land parcels adjacent to the Alazan Courts using MTW dollars, with the purpose of redeveloping Alazan Court and the surrounding neighborhood. This activity uses \$109,642.00 of MTW funds to pay for the demolition and abatement of an existing structure on one of the 18 purchased lots.

MTW042 - 100 Labor Multi Family Development: MTW funds were used towards the closing of the 100 Labor Multifamily Redevelopment Project.

MTW043 - Rosemont at Highland Park: MTW funds were used to cover operating expenses of the Rosemont at Highland Park project.

MTW045 - Expansion of PH Wifi: As part of the SAHA Road to Digital Inclusion initiative, these MTW funds will be used to narrow the digital divide and bring much needed Internet connectivity and accessibility to the Public Housing and Beacon portfolios. This includes funding the first year of bandwidth, WI-FI management, installation, labor and support of the expanded network.

MTW046 - Costa Valencia: MTW funds were used to cover the acquisition and related closing costs associated with the purchase of the investor limited partnership and special limited partnership interest in the Costa Valencia property.

B. Local Asset Management Plan

- i. Did the MTW PHA allocate costs within the statute in the Plan Year?
- ii. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?
- iii. Did the MTW PHA provide a LAMP in the appendix?

| |
|----|
| NA |
| NA |
| NA |



iv. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year:

Not Applicable



VI. Administrative

A. Reviews, Audits and Inspections

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

There were no HUD reviews, audits or physical inspection issues that required the agency to take action to address the issue.

B. Evaluation Results

Results of latest PHA-directed evaluations of the demonstration.

SAHA is not currently engaged in any agency-wide evaluations of its MTW program.

FY2015-1: MDRC / HUD Rent Study is ongoing and SAHA continues to work closely with MDRC. The Agency is currently working with MDRC to execute an amendment to the current memorandum of understanding to allow MDRC to collect data on the study participants through the end of the 6-year follow-up period. The Agency intends to continue participation through FY2021-2022.

C. MTW Statutory Requirement Certification

Certification that the PHA has met the three statutory requirements in the Plan Year of: (1) ensuring that at least 75% of households assisted by the MTW PHA are very low-income, (2) continuing to assist substantially the same total number of households as would have been assisted had the MTW PHA not participated in the MTW demonstration, and (3) maintaining a comparable mix of households (by family size) served as would have been served had the MTW PHA not participated in the MTW demonstration.

See the following page.

D. MTW Energy Performance Contract (EPC) Flexibility Data

Not Applicable



Certification of MTW Statutory Compliance

The San Antonio Housing Authority hereby certifies that it (the Agency) has met the three statutory requirements of:

1) Assuring that at least 75 percent of the families assisted by the Agency are very low-income families: At fiscal year-end, 17,013 households out of a total of 17,406 (98%) households were very low-income (<50% AMI).

| | Total Households | Number below 50% AMI | % Below 50% AMI |
|--------------------------|------------------|----------------------|-----------------|
| PH at FYE | 5,580 | 5,490 | 98% |
| Vouchers at FYE | 11,718 | 11,459 | 98% |
| LNT at admissions | 108 | 64 | 59% |
| Total | 17,406 | 17,013 | 98% |

2) Continuing to assist substantially the same total number of eligible low- income families as would have been served had the amounts not been combined: The Agency's FY2021 MTW families served (annual average) is 17,971 out of 17,950 MTW adjusted baseline denominator (100%).

| | MTW Baseline | FY2021 Average | MTW Baseline Compliance Calculation |
|---------------------------------------|---------------|----------------|-------------------------------------|
| PH | 5,710 | 5,611 | 98% |
| Vouchers | 12,240 | 12,096 | 99% |
| Other (Local, Non-Traditional) | --- | 264 | -- |
| Total | 17,950 | 17,971 | 100% |

3) Maintaining a comparable mix of families (by family size) served, as would have been provided had the amounts not been used under the demonstration: The Agency continues to serve a comparable mix of households by household size.

Mix of Family Sizes Served

| | MTW Baseline | FY2021 Percentage (FYE) | Change |
|------------------|--------------|-------------------------|--------|
| 1-person | 36% | 39% | 3% |
| 2-person | 16% | 18% | 2% |
| 3-person | 18% | 16% | -2% |
| 4-person | 15% | 13% | -2% |
| 5-person | 9% | 8% | -1% |
| 6-person+ | 7% | 6% | -1% |

DocuSigned by:

E Hinojosa Jr

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Ed Hinojosa

President and CEO

9/29/2021

Date



