



Moving to Work Annual MTW Plan- FY2014

San Antonio Housing Authority | 818 S. Flores | San Antonio, TX 78204 | www.saha.org

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I. Introduction

The San Antonio Housing Authority (SAHA) provides housing to over 70,000 children, adults, and seniors through three housing programs – Public Housing, Housing Choice Vouchers, and mixed-income housing programs. SAHA employs approximately 500 people and has an annual operating budget of \$172 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 subsidy, capital fund program (CFP) grants, and Housing Choice Voucher (HCV) program subsidies into a single fund block grant. The MTW program focuses on three goals:

- to reduce cost and achieve greater cost effectiveness in Federal expenditures
- to give incentives that promote self-sufficiency
- to increase housing choices for low-income families in San Antonio

This year's MTW Plan proposes new activities that further all three of these goals, and also proposes adjustments to existing activities to facilitate implementation, measurement, and/or reporting. The following overview describes the activities associated with each of the three MTW goals. Many activities further more than one goal and are listed in this table under their primary goal.

Activity	Description	Status
Promote Self-Sufficiency		
FY2011-1a	Promote Education through Partnerships	Propose to close out as activity and incorporate into Section VII
FY2011-1c	Holistic Case Management	Propose to close out as activity and incorporate into Section VII
FY2011-1d	Resident Ambassador Program	Propose to close out as activity and incorporate into Section VII
FY2013-1	Time-limited Working Household Preference Pilot Program (PH only)	Preparing to implement
FY2014-2	Path to Self Sufficiency	Proposed new activity
Increase Housing Choices		
FY2011-1	Block grant funding with full flexibility	Implemented/Ongoing
FY2011-1e	Preservation and expansion of affordable housing	Implemented/Ongoing/ Propose Revising Metrics
FY2011-2	Simplify and streamline HUD approval process for the development, redevelopment, and acquisition of Public Housing	Propose to close out
FY2011-6	Commitment of project-based vouchers (PBV) to SAHA-owned or controlled units with expiring subsidies	Partially Implemented
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	Implemented/Ongoing
FY2011-8	Revise mobility rules for PBV	Implemented/Ongoing
FY2011-9	Allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who will provide supportive services to those households	Partially Implemented; Propose revising metrics

Reduce Cost and Achieve Greater Cost Effectiveness

FY2011-3	Biennial reexamination for elderly/disabled (PH)	Proposed to close out and consolidate into FY2014-4 and FY2014-5
FY2011-4	Streamline methods of verification for Public Housing and HCV	Proposed to close out and consolidate into FY2014-1
FY2011-5	Requirements for acceptable documents for Public Housing and HCV	Proposed to close out and consolidate into FY2014-1
FY2012-10	Biennial reexamination for elderly/disabled (HCV)	Proposed to close out and replace by FY2014-4 and FY2014-5
FY2013-2	Simplified Earned Income Disregard (EID)	Adjustments proposed
FY2013-4	HQS Inspection of SAHA-owned non-profits by SAHA inspectors	Implemented and ongoing
FY2014-1	Streamline Reexamination Requirements and Methods (HCV)	Proposed new activity
FY2014-3	Faster Implementation of Payment Standard Decreases (HCV)	Proposed new activity
FY2014-4	Biennial Reexaminations (HCV and PH)	Proposed new activity
FY2014-5	Triennial Reexaminations (HCV)	Proposed new activity
FY2014-6	Rent Simplification	Proposed new activity

II. General Housing Authority Operating Information

A. Housing Stock Information

Anticipated number of Public Housing units at the beginning of the plan year

The anticipated number of Public Housing units at the beginning of the plan year is 6,322.

Description of any planned significant capital expenditures by development

SAHA does not anticipate any significant capital expenditures during the plan year.

Description of any new Public Housing units to be added during the year by development

SAHA plans to add new Public Housing units to San Juan Homes as part of the ongoing redevelopment of the community. The unit types, which are all ADA 504-compliant walk-ups, are described in the following table.

Unit Type	Number of Units
1 Bedroom	3
2 Bedroom	33
3 Bedroom	24
4 Bedroom	3
5 Bedroom	0
Total:	63

Number of Public Housing units to be removed from the inventory during the year by development

SAHA plans to remove 116 units from San Juan Homes as part of the ongoing redevelopment of the community.

Number of MTW HCV authorized

SAHA administers 12,776 MTW authorized vouchers. The total MTW authorized vouchers includes Housing Choice Vouchers, non-elderly and non-disabled vouchers, and vouchers for homeless individuals and households.

Housing Choice Voucher (HCV) Program- provides rental voucher assistance to households who meet eligibility requirements.

Non-Elderly and Non-Disabled (NED) Voucher Program – provides rental voucher assistance to households who are non-elderly and non-disabled. Currently, SAHA has 75 vouchers reserved for these households.

Project-Based Voucher (PBV) Program- provides rental voucher assistance to households that reside at a specific development. SAHA’s non-profit portfolio currently includes 45 affordable mixed-income communities totaling 7,220 units, of which 341 units are Public Housing. SAHA has a total of 181 committed project-based vouchers. At the end of fiscal year 2012, 56 units at Springhill Apartments were leased.

Set-Aside Voucher Program - provides rental voucher assistance to homeless individuals, through a collaborative referral process. Two local non-profits, The Center for Health Care Services (CHCS) and San Antonio Metropolitan Ministries (SAMM), screens the applicants to ensure they have met all criteria and forwards the applicant packets to SAHA. SAHA places the applicants on the waiting list. Upon selection from the waiting list, applicants are notified by mail to schedule an eligibility appointment. Currently, SAHA has 200 set-aside vouchers.

Homeless Services Voucher (HSV) Program - provides rental voucher assistance to homeless individuals, through a collaborative referral process. A local non-profit, Haven for Hope, refers applicants to the City of San Antonio after they have resided on the Haven for Hope campus for 30 days. The City of San Antonio screens the applicants to ensure they have met all criteria and forwards the applicant packets to SAHA. SAHA places the applicants on the waiting list. Upon selection from the waiting list, applicants are notified by mail to schedule an eligibility appointment. Currently, SAHA has 400 HSV authorized vouchers.

Number of non-MTW HCV authorized

SAHA administers 878 Non-MTW authorized vouchers.

In addition to the MTW HCV authorized vouchers, SAHA operates many housing programs through non-MTW vouchers. These special programs serve special populations including those who are homeless, disabled, and/or veterans. SAHA is authorized to administer the following non-MTW vouchers:

Moderate Rehabilitation (Mod-Rehab) Program- provides rent subsidy payments to private property landlords for select rental units that have been rehabilitated under this program. Subsidies provide housing assistance to homeless families and individuals as they transition into affordable housing. There are a total of 267 vouchers for families.

Shelter Plus Care (S+C) - provides rental assistance and supportive services for homeless families and individuals with disabilities, primarily those with serious mental illnesses, chronic problems due to alcohol or drug dependencies, and acquired immune deficiency syndrome (AIDS) or related diseases. There are 101 vouchers committed to S+C.

Mainstream – provides rental assistance for elderly and disabled households. Currently, there are 100 vouchers authorized for this program.

HUD-VASH- serves homeless veterans by combining the HCV rental assistance program with case management and clinical services provided by Veterans Affairs medical centers. There are presently 410 families authorized for assistance under this program.

Number of HCV units project-based during the Plan year, including description of each separate project

SAHA has allocated up to 181 HCV units project-based at the Springhill development. Springhill has a total of 449 units. This local, non-traditional project-based program is an important strategy to increase occupancy at Springhill and preserve affordable housing. Families are selected from the local project-based waiting list based on the availability of units at Springhill. Project-based families must reside at Springhill for two years, after which time the family will be eligible for a Section 8 voucher.

B. Leasing Information

Total number of MTW PH units anticipated to lease in Plan year (July 1, 2013 – June 30, 2014)

Historically, PH units have leased at a rate of 97%. If that trend continues this plan year, SAHA expects to lease 6,019 units.

Anticipated total number of non-MTW PH units leased in Plan year

Not applicable: all SAHA PH units are MTW

Anticipated total number of MTW HCV units leased in Plan year

Due to the volatile funding environment, this is harder to forecast than usual. Typically, SAHA aims for 97-99% utilization. Forecasted UMAs for FY 2013-14 is 153,288 (includes TPV-SRO 87 and San Juan 115) and at 98% utilized our UMLs would be 150,222. The forecasted HAP utilization is 105.09% if we are subject to sequestration (94.9% funding). We are anticipating a \$3.1 million funding cut to the HCV program.

Anticipated total number of non-MTW HCV units leased in Plan year

Program	Total Unit Months	Unit Months Leased	Utilization
MOD	3,204	2,884	90%
SPC	1,212	1,091	90%
Mainstream	1,200	1,200	100%
HUD-VASH	4,920	4,428	90%

Description of any anticipated issues related to leasing of PH or HCVs

As mentioned above, sequestration would have a serious impact on the HCV program, which is projected to lose approximately \$3 million in funding for CY 2013. This could impact how many families we could continue to serve. The nature of SAHA's non-MTW voucher programs has presented a few challenges in achieving a higher utilization rate. These vouchers are providing assistance to special populations who are facing a myriad of mental and physical health conditions. Some programs are providing transitional housing and case management, and experience high attrition rates.

C. Waiting List Information

SAHA currently maintains separate waiting lists for PH and HCV.

Public Housing

SAHA has recently opened the Public Housing waiting list. The new system makes use of an always-open, online waiting list. SAHA anticipates around 20,000 registrations.

Housing Choice Voucher Program

SAHA re-opened the Section 8 Housing Choice Voucher Waiting List on May 15, 2012, with a new, online application process.

No major changes are currently scheduled for the waiting list, but SAHA may periodically rescind the use of the veterans, homeless, and disability preferences. Annually, SAHA will monitor the number of applicants in each of these preference categories. Each category will be calculated as a percent of total applicants. This percentage will be compared with community-wide population data and current program participant data. If the percent of applicants in a preference category exceeds (1) the estimated percent of community-wide individuals/households and (2) the percent of existing participant households in the corresponding population category, SAHA will rescind the use of the preference.

In determining community-wide percentages, SAHA will utilize the most recent data available from various sources including but not limited to the Census, the City of San Antonio, the Veterans Administration, the Homeless Coalition or other such reliable sources. Notification of rescission of a Secondary Local Preference will be posted on the website for the on-line application 30 days prior to the effective date of rescission.

Any preference that is rescinded will be reinstated when the annual analysis of applicants indicates that the applicant pool is no longer reflective of the community-wide population data.

III. Non-MTW Related Housing Authority Information (optional)

A. List planned vs. actual sources and uses of other HUD or other Federal Funds (excluding HOPE VI)

Not applicable.

B. Description of non-MTW activities implemented by the Agency

Supportive Housing

In addition to MTW housing programs, SAHA offers affordable housing linked to accessible supportive services, including mental health, substance addiction, unemployment, and other support services that provide assistance for families and individuals to live more stable, productive lives. Supportive housing works particularly well for those facing complex life challenges, such as homelessness, HIV/AIDS, prison or jail release, and/or mental illness.

SAHA is committed to reducing homelessness in San Antonio through programs that provide affordable quality housing for homeless individuals and families. In an effort to provide quality assistance, the agency works with non-profit organizations and Continuum of Care (CoC) partners that offer services to address issues that affect client quality of life.

Below is a brief description of the agency's non-MTW supportive housing programs:

Moderate Rehabilitation (Mod-Rehab) Program- provides rent subsidy payments to private property landlords for select rental units that have been rehabilitated under this program. Subsidies provide housing assistance to homeless families and individuals as they transition into affordable housing. There are a total of 267 vouchers for families.

Shelter Plus Care (S+C) - provides rental assistance and supportive services for homeless families and individuals with disabilities, primarily those with serious mental illnesses, chronic problems due to alcohol or drug dependencies, and acquired immune deficiency syndrome (AIDS) or related diseases. There are 101 vouchers committed to S+C.

Mainstream – provides rental assistance for elderly and disabled households. Currently, there are 100 vouchers authorized for this program.

HUD-VASH- serves homeless veterans by combining the HCV rental assistance program with case management and clinical services provided by Veterans Affairs medical centers. There are presently 410 families authorized for assistance under this program.

Choice Neighborhoods Initiative

After much determination and strong collaboration with partners, residents, neighbors and the San Antonio community, SAHA was awarded a \$29,750,000 Choice Neighborhoods Implementation Grant from HUD to revitalize the Wheatley Courts area on the city’s Eastside. San Antonio was one of only four communities nationwide to receive a 2012 Choice Implementation Grant.

Leading up to the Choice application submission, SAHA held numerous community planning sessions, which were attended by neighborhood residents, area businesses, public agencies, local stakeholders and community leaders. SAHA submitted the resulting Implementation Grant application to HUD in April 2012.

This revitalization effort is an extraordinary collaboration among public and private institutions that builds on the investment of the United Way-led Eastside Promise Neighborhood initiative, which received a \$23.7 million grant in December 2011 from the Department of Education, to bolster children's educational achievement and foster community development on the Eastside.

Choice/Promise partners include Mayor Julián Castro, the City of San Antonio, Councilwoman Ivy Taylor, United Way, Trinity University, San Antonio Independent School District (SAISD), the Wheatley Resident Council, VIA, Family Service Association, San Antonio for Growth on the Eastside (SAGE), St. Philip’s College, Neighborhood Housing Services of San Antonio, HIS Bridge Builders, Merced Housing, Antioch Baptist Church, the San Antonio Spurs, and others.

The Choice Neighborhood efforts support positive outcomes for families in education through Promise Neighborhoods, while increasing employment and self-sufficiency through targeted job-training programs.

IV. Long-term MTW Plan (Optional)

On June 25, 2012, the Board of Commissioners formally approved SAHA’s new Strategic Plan. The core of the plan has three elements: a new vision for the agency, a new mission statement, and a set of six strategic goals.

Vision: Create dynamic communities where people thrive.

Mission: Provide quality affordable housing that is well-integrated into the fabric of neighborhoods and serves as a foundation to improve lives and advance resident independence.

Strategic Goals

1. Empower and equip families to improve their quality of life and achieve economic stability.
2. Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service.
3. Preserve and improve existing affordable housing resources and opportunities.
4. Strategically expand the supply of affordable housing.
5. Transform core operations to be a high performing and financially strong organization.
6. Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.

SAHA’s MTW Plan and Strategic Plan are closely integrated. The Strategic Plan goals articulate and reinforce the three statutory MTW goals. At the same time, “Leverage MTW designation to transform core operations” is a specific objective under Goal 5 (“Transform core operations”) of the Strategic Plan. Finally, at the Action level, each MTW Activity is directly incorporated into the Strategic Plan as a specific action item. Because of the tight integration between the plans, progress in any MTW Activity is automatically captured in Strategic Plan progress reports.

SAHA is currently developing a Strategic Plan Dashboard that would simplify tracking of plan progress. The Dashboard would quantify actionable metrics and show activity status on a series of online displays.

SAHA is also performing an internal Control Self-Assessment (CSA) to identify objectives, risks, and controls in MTW Plan/Report process. The goal is to improve the efficiency and effectiveness of the process that goes into developing the MTW plan and related MTW report. SAHA looks forward to implementing the CSA recommendations as early as the next MTW Plan cycle.

V. Proposed MTW Activities: HUD Approval requested

FY2011-6 - Commitment of PBV to SAHA-owned or Controlled Units

Significant changes are being proposed to this current and ongoing activity. Previously focused on one community, Springhill, the proposed changes below would expand the number of communities in which Project-Based Vouchers (PBV) could be applied. Proposed edits also clarify that commitment of PBV to privately-owned developments would be made through a competitive process.

SAHA proposes to increase the number of PBV committed to units in new developments in its affordable mixed-income housing portfolio. The number of units so committed will not exceed 250. In previous years, SAHA has leased 56 PBV units under this activity.

SAHA may commit additional PBV vouchers to San Juan Homes III, Wheatley Courts, Sutton Homes II, or any other SAHA-owned or – controlled development in its mixed-income affordable housing portfolio to expand housing opportunities.

This Activity applies only to commitment of PBV to SAHA-owned or controlled units. Any commitment of PBV in privately-owned developments will be made through a competitive process outside the scope of this Activity.

Impact	Metric	Baseline	Benchmark
Increase affordable housing	Number of PBV committed to SAHA-owned or controlled units	0	Increase by June 2014 to 84

Data Collection Methods: SAHA tracks the leasing of PBV units using ELITE live database.

Statutory Objective: Increase Housing Choices

Authorizations: MTW Agreement Attachment C, Section D(7)(a) and D(7)(b) (Establishment of an Agency MTW Section 8 Project-Based Program)

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

This activity consolidates previous activities FY2011-4 and FY2011-5, allowing for easier tracking, greater implementation flexibility, and increased focus on outcomes.

While continuing the mandatory use of the Enterprise Income Verification (EIV) report, HCV staff transitioned from the use of third party verification of income from employers to the use of participant-provided documents. SAHA continues to use oral verifications and/or mailed third-party verification in the event of a discrepancy or if documents appear altered. The agency also employs quality control measures to randomly select participant accounts and require additional verification to ensure the integrity of the verification process. Third-party verification of assets is still required for assets totaling a value of \$25,000 or more.

In addition to streamlining methods of document verification, SAHA wanted to reduce the number of applicants and participants resubmitting documents for approved extension of voucher, and/or reasonable accommodations. SAHA has revised its policy to extend the length of time that applicant/participant-provided documents would be valid for verification purposes. Applicant-provided documents dated within 90 calendar days from the eligibility appointment and participant-provided documents dated within 120 calendar days from the reexamination appointment would be valid. This does not apply to permanent documents, such as social security cards, birth certificates, and identification cards. The proposed activity provides flexibility in the design and administration of housing assistance to increase operational efficiency and achieve greater cost effectiveness in federal expenditures.

Impact	Metric	Baseline	Benchmark
Reduce the number of office visits due to requests for additional documentation	Number of office visits due to requests for additional documentation	13,000	By end of FY2014: 12,000
Increase the rate of files completed within a timely manner	Percentage rate of files completed within 30-45 days of reexamination effective date	HCV Annuals rate: 54.7% HCV Interims rate: 76.7%	By end of FY2014: Annuals: 64.7% Interims: 86.7%

Challenges:

Baselines and benchmarks have been updated for one of the metrics to reflect rates of success, instead of raw numbers. Percentages reflected in the baselines are drawn from internal quarterly reports, specifically FY2013 Q1 and Q2 reports. Percentages in the benchmarks reflect a 10% increase from the baselines.

Data Collection Methods: Currently, SAHA staff track the number of office visits manually.

Statutory Objective: Reduce Cost and Achieve Greater Cost Effectiveness

Authorizations: MTW Agreement Attachment C, Section D(3)(b)
(Eligibility of Participants).

FY2014-2 – Path to Self Sufficiency

This activity establishes a requirement that applicants complete a defined set of courses upon admission to PH or HCV. The courses are designed to provide incoming households with the skills to become successful residents, while establishing clear expectations and minimizing the number of crisis situations over the long term. The curriculum is the product of formal partnerships with other agencies who participate as instructors or advisors in the design and implementation of the courses. Topics include finding the right home/neighborhood, working with landlords, financial literacy, fair housing, safety, upkeep, and sustainability.

Elderly and disabled heads of households are exempt from the requirement, but encouraged to take the courses. Those who successfully complete the courses will receive a certificate. SAHA will communicate to landlords the value of a certified applicant as someone who is better prepared for a successful tenancy.

This activity is one part of a proposed comprehensive self-sufficiency framework. The framework is designed to provide structure and direction to the current variety of self-sufficiency programs and services offered by SAHA and its partners. Tiered levels of service are defined that are appropriate to the condition and capacity of the household.

- Tier 1. Early Engagement: SAHA provides notification about self-sufficiency events (including via email/texting); available to all on waiting list
- Tier 2. Service Brokering: SAHA uses ROSS grant resources to match households with appropriate services
- Tier 3. Intensive Case Management Services: households participate in FSS or Jobs Plus

Impact	Metric	Baseline	Benchmark
Increase the number of participants receiving a Path to Self Sufficiency certificate	Number of certified participants	0	1,920 by end of FY 2014
Decrease the number of negative program exits	Negative program exits	PH: 41 HCV: 44	10% reduction by end of FY 2014 PH: 37 HCV: 40

Data Collection Methods: In order to support the ability to track household and program goals over time, SAHA is developing a household self-sufficiency / stability assessment tool. This tool would quickly evaluate a household's status on a scale from crisis to stability for a number of factors, including employment, housing, health, education, income, food, transportation, and safety. This evaluation would be used to determine what tier of service is appropriate to the household, and could be administered periodically to gauge progress. SAHA is working with partners, especially those working in the Choice Neighborhood area, to develop the tool so that it is widely useful. Upon implementation of this tool, SAHA will be able to add an additional self-sufficiency/stability metric to this activity.

Statutory Objective: Promote self-sufficiency and Reduce Cost and Achieve Greater Cost Effectiveness

Authorizations: MTW Agreement Attachment C, Section C(2) (Local Preferences and Admission and Continued Occupancy Policies and Procedures) and Section D(4) (Waiting List Policies).

FY2014-3 – Faster Implementation of Payment Standard Decreases (HCV)

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). This will facilitate implementation of the lower payment standards in the event that FMR is reduced. 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.

Impact	Metric	Baseline	Benchmark
Total cost of task in dollars (decrease).	Average Per Unit Cost	\$568.51	Reduce HAP cost by .05%

Data Collection Methods: SAHA will monitor the per unit cost each month using various reports from Elite.

Statutory Objective: Reduce Cost and Achieve Greater Cost Effectiveness

Authorizations: The Agency is authorized to define, adopt and implement a reexamination program that differs from the reexamination program currently mandated in the 1937 Act and its implementing regulations by MTW Agreement Attachment C, Section D(1)(c).

FY2014-4 – Biennial Reexaminations (HCV and PH)

All HCV and PH participants must complete annual reexaminations of their family income and composition. SAHA proposes to conduct biennial reexaminations for all non-elderly/disabled HCV participant households (approximately 8,500 households) as well as all PH households.

Currently, SAHA recertifies our elderly/disabled families on a 100% fixed income biennially. Since implementation SAHA has had significant cost reduction and staff time. These factors along with the current funding environment, SAHA has decided to implement biennial for all HCV participants.

SAHA may initially use random selection methods and tools to select voucher participants in scheduling reexaminations. Half of the HCV participants will be on a two-year reexamination cycle starting in the first year and the remainder will be on a two-year cycle starting in the second year of program implementation. Every family will have the option of interim reexamination at any time if there is a change in family composition, reduction in income or an increase in expenses.

In order to meet program requirements, FSS participants will maintain an annual reexamination schedule. Participants in other programs that require regular reexaminations will also maintain an annual reexamination schedule.

Hardship policy:

Families experiencing a financial hardship due to a biennial recertification can request their income to be recertified annually.

Impact	Metric	Baseline	Benchmark
Reduce HCV staff time	Staff time spent on reexaminations	8,500 hours per year	Reduce to 4,000 hours per year
Reduce HCV costs	Cost reduction on reexamination process	\$128,350 per year	Cost savings of approximately \$64,175 in year 1 of implementation
Reduce PH staff time	Staff time spent on reexaminations	5,890 hours per year	Reduce to 2,890 hours per year
Reduce PH costs	Cost reduction on reexamination process	\$91,295 per year	Cost savings of approximately \$45,633 in year 1 of implementation

Data Collection Methods:

SAHA will conduct time studies to verify the number of hours that staff spends on conducting reexaminations.

Statutory Objective: Reduce Cost and Achieve Greater Cost Effectiveness

Authorizations: The Agency is authorized to define, adopt and implement a reexamination program that differs from the reexamination program currently mandated in the 1937 Act and its implementing regulations by MTW Agreement Attachment C, Section D(1)(c).

Impact Analysis of Biennial Reexaminations on Public Housing Households

SAHA anticipates that 5,905 public housing households are eligible for biennial reexaminations. In FY 2013, the total income for those 5,905 households increased \$1,155,242. If the total income increase in FY2014 mirrors the FY2013 increase, then SAHA anticipates that residents will keep a total of \$346,572 due to biennial reexaminations. On average, that comes to \$58.69 per household.

See table below, “Total Adjusted Residential Income”:

6/30/2012	6/30/2013	Difference	Potential Total Income Increase (@30%)	Eligible Participants for Biennial Recertification	Average Income Increase
\$56,907,963	\$58,063,205	\$1,155,242	\$346,572	5,905	\$58.69

Impact Analysis of Biennial Reexaminations on HCV Households

The impact analysis for activities FY2014-4 and FY2014-5 are presented in combined format in the following section. Please see “Impact Analysis of Biennial and Triennial Reexaminations on HCV Households” below.

FY2014-5 – Triennial Reexaminations (HCV)

Currently, all HCV Elderly/Disabled participants on a 100% fixed income must complete a biennial reexamination of their family income and composition. SAHA defines fixed income as Social Security (SS), Supplemental Security Income (SSI), and pension. Documentation shows that elderly and disabled participants experience minimal income changes each year; typically, the only change is the result of a cost of living increase from the Social Security Administration (SSA).

The inconvenience to the elderly and disabled residents due to these reexaminations may pose a physical burden and result in inefficient use of staff time. SAHA proposes to conduct triennial reexaminations for elderly/disabled HCV participant households on a 100% fixed income. As new families are qualified for triennial reexaminations, they will be phased in to a 3-year process. Every family will have the option of interim reexaminations at any time if there is a change in family composition, reduction in income or an increase in medical expenses.

Impact	Metric	Baseline	Benchmark
Reduce Staff time	Staff time spent on reexaminations	12,000 hours over 3 years	8,000 over 3 years
Reduce costs	Cost reduction on reexamination process	\$181,200 over 3 years	\$120,800 over 3 years

Data Collection Methods: SAHA will conduct time studies to verify the number of hours that staff spends on conducting reexaminations.

Statutory Objective: Reduce Cost and Achieve Greater Cost Effectiveness

Authorizations: The Agency is authorized to define, adopt and implement a reexamination program that differs from the reexamination program currently mandated in the 1937 Act and its implementing regulations by MTW Agreement Attachment C, Section D(1)(c).

Hardship Policy

Families experiencing a financial hardship due to a triennial recertification can request their income to be recertify annually.

Impact Analysis of Biennial and Triennial Reexaminations on HCV Households

Biennial & Triennial - IMPACT ANALYSIS						
	# of Participants	% of Participants	# of Eligible Families for Triennial Recertifications**		# of Eligible Families for Biennial Recertification	
			Fixed Income			
All Housing Choice Vouchers Households	12,544		3,376		9,168	
Annual Gross Income < \$5,000 (1st year)	1,975	15.74%	42	1.24%	1,933	21.08%
Annual Gross Income < \$5,000 (2nd year)	1,902	15.16%	42	1.24%	1,860	20.29%
Annual Gross Income < \$5,000 (3rd year)	40	0.32%	40	1.18%	N/A	N/A
Annual Gross Income >\$5,000 (1st year)	10,569	84.26%	3,334	98.76%	7,235	78.92%
Annual Gross Income >\$5,000 (2nd year)	10,642	84.84%	3,334	98.76%	7,308	79.71%
Annual Gross Income >\$5,000 (3rd year)	3,336	26.59%	3,336	98.82%	N/A	N/A
Average Income excluded after 2nd Year (SS COLA)			\$123		\$187	
Average Income excluded after 3rd Year (SS COLA)			\$247		N/A	N/A

*Analysis based on data as of June 1, 2013

**The number of participants identified and processed as biennials as of June 1, 2013.

***Changes of income greater than \$1,000 are processed

FY2014-6 – Rent Simplification (HCV)

Currently, 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 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 family’s 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 recertification.

Participants who are granted the hardship exemption will not be eligible for biennial or triennial reexaminations.

Impact	Metric	Baseline	Benchmark
Reduce cost	HAP Expense	\$551 per unit	\$549 per unit
Improved accuracy in file processing	QA Score	89%	95%
Staff Savings	Time staff spends calculating deductions	\$91,500 for all MTW annual recertifications	\$46,710 over a 3 year period

Data Collection: Data collection for QA Score is managed with an Access database. HAP Expense will be obtained from reports generated from Elite. SAHA will conduct time studies to verify the number of hours that staff spends on calculating income and deductions.

Statutory Objective: Reduce Cost and Achieve Greater Cost Effectiveness

Authorizations: MTW Agreement Attachment C, Section D (2)(a)(Rent Policies and Term Limits).

Impact Analysis of Rent Simplification on HCV Households

RENT SIMPLIFICATION - IMPACT ANALYSIS											
	# of Participants	% of Participants	Current HAP	Proposed HAP	HAP Difference	Current Tenant Portion	Proposed Tenant Portion	Tenant Portion Difference	Current TTP	Proposed TTP	TTP Difference
All Housing Choice Vouchers Households	11,079		\$552	\$550	\$(2)	\$180	\$171	\$(9)	\$255	\$258	\$3
Annual Gross Income < \$5,000	1,613	14.56%	\$763	\$763	\$-	\$24	\$(27)	\$(51)	\$60	\$63	\$3
<i>Positive impact</i>	1,264	78.36%	\$774	\$778	\$4	\$18	\$(51)	\$(69)	\$58	\$58	\$-
<i>Negative impact</i>	349	21.64%	\$724	\$709	\$(15)	\$48	\$60	\$12	\$67	\$82	\$15
Receive utility reimbursement	1,638	14.78%	\$836	\$819	\$(17)	\$-	\$(56)	\$(56)	\$92	\$109	\$17
<i>Positive impact</i>	1,397	85.29%	\$836	\$824	\$(12)	\$-	\$(70)	\$(70)	\$85	\$98	\$13
<i>Negative impact</i>	241	14.71%	\$834	\$793	\$(41)	\$-	\$21	\$21	\$133	\$174	\$41
Children in the household	6,769	61.10%	\$637	\$628	\$(9)	\$178	\$170	\$(8)	\$268	\$280	\$12
<i>Positive impact</i>	3,484	51.47%	\$613	\$621	\$8	\$200	\$161	\$(39)	\$283	\$281	\$(2)
<i>Negative impact</i>	3,285	48.53%	\$663	\$636	\$(27)	\$154	\$179	\$25	\$252	\$279	\$27
Three or more dependents	3,055	27.57%	\$725	\$703	\$(22)	\$156	\$151	\$(5)	\$266	\$291	\$25
<i>Positive impact</i>	1,209	39.57%	\$750	\$746	\$(4)	\$151	\$91	\$(60)	\$245	\$256	\$11
<i>Negative impact</i>	1,846	60.43%	\$708	\$674	\$(34)	\$159	\$191	\$32	\$280	\$313	\$33
Claim childcare expenses >= \$2,000	424	3.83%	\$528	\$437	\$(91)	\$275	\$362	\$87	\$377	\$470	\$93
<i>Positive impact</i>	10	2.36%	\$622	\$607	\$(15)	\$219	\$180	\$(39)	\$183	\$300	\$117
<i>Negative impact</i>	414	97.64%	\$526	\$433	\$(93)	\$276	\$367	\$91	\$382	\$474	\$92

Claim childcare expenses less than \$2000	168	1.52%	\$554	\$524	\$(30)	\$253	\$278	\$25	\$340	\$371	\$31
<i>Positive impact</i>	14	8.33%	\$476	\$484	\$8	\$315	\$286	\$(29)	\$382	\$386	\$4
<i>Negative impact</i>	154	91.67%	\$560	\$527	\$(33)	\$247	\$278	\$31	\$337	\$369	\$32
Claim medical expenses greater than or equal \$2,000	37	0.33%	\$383	\$331	\$(52)	\$262	\$315	\$53	\$301	\$357	\$56
<i>Positive impact</i>	1	2.70%	\$552	\$581	\$29	\$393	\$364	\$(29)	\$329	\$451	\$122
<i>Negative impact</i>	36	97.30%	\$378	\$324	\$(54)	\$259	\$313	\$54	\$300	\$355	\$55
Claim medical expenses less than \$2,000	589	5.32%	\$407	\$402	\$(5)	\$248	\$252	\$4	\$308	\$314	\$6
<i>Positive impact</i>	245	41.60%	\$347	\$356	\$9	\$297	\$285	\$(12)	\$349	\$343	\$(6)
<i>Negative impact</i>	344	58.40%	\$449	\$435	\$(14)	\$213	\$227	\$14	\$279	\$293	\$14
Rent decreases	7,372	66.54%	\$506	\$518	\$12	\$190	\$164	\$(26)	\$256	\$248	\$(8)
Rent increases	3,580	32.31%	\$641	\$616	\$(25)	\$157	\$182	\$25	\$252	\$277	\$25
No change in rent	127	1.15%	\$561	\$559	\$(2)	\$219	\$219	\$-	\$300	\$306	\$6

Rent Increase Increments											
	# of Participants	% of Participants	Current HAP	Proposed HAP	HAP Difference	Current Tenant Portion	Proposed Tenant Portion	Tenant Portion Difference	Current TTP	Proposed TTP	TTP Difference
\$1 to \$5	831	23.21%	\$593	\$588	\$(5)	\$159	\$162	\$3	\$236	\$241	\$5
\$6 to \$10	551	15.39%	\$632	\$622	\$(10)	\$147	\$155	\$8	\$240	\$250	\$10
\$11 to \$15	503	14.05%	\$644	\$630	\$(14)	\$148	\$161	\$13	\$243	\$257	\$14
\$16 to \$20	416	11.62%	\$671	\$652	\$(19)	\$129	\$147	\$18	\$218	\$237	\$19
\$21 to \$25	273	7.63%	\$702	\$678	\$(24)	\$134	\$157	\$23	\$242	\$266	\$24
\$26 to \$30	189	5.28%	\$694	\$665	\$(29)	\$141	\$169	\$28	\$236	\$266	\$30
\$31 to \$35	146	4.08%	\$725	\$691	\$(34)	\$141	\$173	\$32	\$246	\$280	\$34
\$36 to \$40	124	3.46%	\$712	\$674	\$(38)	\$161	\$199	\$38	\$282	\$320	\$38
\$41 to \$45	77	2.15%	\$708	\$664	\$(44)	\$173	\$216	\$43	\$275	\$318	\$43
\$46 to \$50	47	1.31%	\$649	\$597	\$(52)	\$236	\$284	\$48	\$346	\$397	\$51
\$51 to \$75	177	4.94%	\$622	\$559	\$(63)	\$211	\$273	\$62	\$317	\$379	\$62
\$76 to \$100	101	2.82%	\$556	\$469	\$(87)	\$247	\$334	\$87	\$361	\$447	\$86
\$101 to \$200	129	3.60%	\$571	\$435	\$(136)	\$222	\$357	\$135	\$333	\$465	\$132
>\$200	16	0.45%	\$706	\$469	\$(237)	\$184	\$418	\$234	\$332	\$569	\$237

Additional Household Information											
	# of Participants	% of Participants	Current HAP	Proposed HAP	HAP Difference	Tenant Portion	Proposed Tenant Portion	Tenant Portion Difference	Current TTP	Proposed TTP	TTP Difference
Average household gross income	#####										
Households pay rent greater than or equal \$100	7,377										
Households paying more than 30% of income to childcare	99	0.89%	\$ 681	\$541	\$(140)	\$111	\$238	\$127	\$196	\$335	\$139
<i>Positive impact</i>	4	4.04%	\$877	\$809	\$(68)	\$55	\$18	\$(37)	\$127	\$195	\$68
<i>Negative impact</i>	95	95.96%	\$673	\$530	\$(143)	\$113	\$247	\$134	\$199	\$341	\$142
Number of Single Family Households with minors	5,646	50.96%	\$655	\$643	\$(12)	\$163	\$156	\$(7)	\$252	\$266	\$14
<i>Positive impact</i>	2,736	48.46%	\$645	\$650	\$5	\$173	\$131	\$(42)	\$256	\$255	\$(1)
<i>Negative impact</i>	2,910	51.54%	\$664	\$636	\$(28)	\$152	\$179	\$27	\$249	\$277	\$28

VI. Ongoing MTW Activities

Activity	Name/Description	Statutory Objective	Update
FY2011-1	Block grant funding with full flexibility	Increase housing choices	Implemented in FY2010-2011 and ongoing. No changes proposed to activity or authorizations.
	<p>SAHA combined the Public Housing Operating Subsidy, Capital Fund Grants, and Housing Choice Voucher Program Subsidy under a single fund block grant effective July 1, 2010.</p> <p>The block grant funding with full flexibility will allow SAHA to continue to serve at least the same number of households below 50% AMI. In the previous fiscal year, SAHA determined that a more detailed approach to tracking this activity would allow a more thorough evaluation of our success in serving the same number of households pre- and post-MTW designation and block grant funding. SAHA now reports on the total number of households served at the end of the fiscal year disaggregated by household size, AMI category, and housing program.</p>		
FY2011-1a	Promote Education through Partnerships	Promote self-sufficiency	Proposed to be closed out as activity, but reported on in Section VII, Sources and Uses
	<p>This activity has grown from one partnership to many, expanding the potential number of participants and the scope of activities. The activity remains focused on promoting education through any and all available partnerships.</p> <p>Originally, SAHA had partnered with Alamo Colleges' Gateway to College program, on a pilot that promoted education among public housing and HCV residents between the ages of 19 to 24. The Gateway to College program ended in 2012, a result of a change in the program's structure by Alamo Colleges. SAHA has focused on developing new partnerships to promote education. New partnerships include:</p> <ul style="list-style-type: none"> • Margarita R. Huantes Center: This partnership, formed in the fall of 2011, allows SAHA access to the Career Advancement Resources and Educational Services (C.A.R.E.S.) workforce development program. The program is a free, 6-week, 40 hour per week, education process where candidates are empowered to acquire and retain employment. • Alamo Colleges Economic and Workforce Development Department: This partnership was formed in the fall of 2011 and provides access to the Health Professions Occupations Grant (HPOG). Under this grant, seven classes or sessions have been proposed to train up to 20 housing program participants in each class/session. Alamo Colleges will provide tuition, books, and other supplies for on-the-job training. 		

Activity	Name/Description	Statutory Objective	Update
FY2011-1b	Pilot Child Care Program	Promote self-sufficiency	Implemented in FY2010-2011 and closed out
	<p>SAHA designed the pilot child care training program to offer child care and after school services at designated family public housing developments. The agency partnered with child care providers, as well as with job training programs, to create a comprehensive child care certification program with an on-the-job training (OJT) component. Residents enrolled in this program obtain training and certification to be able to work in a SAHA/collaborative partnership child care facility and provide child care services to families in the same development. Residents living in the designated pilot properties would then be able to utilize the child care facility if they were participating in the MTW program and were involved in any of the following approved self-sufficiency activities: education (i.e., GED, college, learning seminars), job training, employment, or job seeking.</p> <p>To implement this activity, SAHA actively engaged in partnerships with Alamo Colleges, Inman Christian Center, Communicare, YMCA and AVANCE daycare. SAHA had also entered into a partnership with Miller Child Development Center, Inc., to provide oversight of the child care centers. Miller Child Development Center has received Rising Star Certification from the State of Texas and has been authorized to receive state subsidy to offset the cost of child care.</p> <p>The pilot childcare training program ended in the fall of 2011. While the program did have some success in FY2011 in assisting 10 residents in their completion of child care training and certification, there was not enough support for the program to continue.</p>		
FY2011-1c	Holistic Case Management	Promote self-sufficiency	Proposed to be closed out as activity, but reported on in Section VII, Sources and Uses
	<p>The holistic case management model is designed to address barriers to employment for housing program residents and participants. Case Management is provided under the FSS Program, the Elderly/Disabled Services (EDS) Program, and the Jobs-Plus program.</p> <p>Currently there are 19 case managers providing FSS enrollment, holistic case management, special program administration, and social service assistance to property management. Twenty-seven (27) public housing properties and all HCV households have assigned case managers.</p>		

Activity	Name/Description	Statutory Objective	Update
FY2011-1d	Resident Ambassador Program	Promote self-sufficiency	Proposed to be closed out as activity, but reported on in Section VII, Sources and Uses
	<p>The resident ambassador program encourages resident participation in outreach and promotion for education, job-training, employment, and community building activities. The ambassadors' purpose is to inform and motivate fellow residents to participate in self-sufficiency activities. Under this activity, residents were provided with a stipend for the following activities:</p> <ul style="list-style-type: none"> • Promoting self-sufficiency activities • Co-organizing community building events • Providing grassroots outreach by distributing flyers and talking with neighbors • Serving as mentors to other residents <p>In year two of this activity, there were two significant changes: (1) the relationship between SAHA and resident ambassadors and (2) the addition of the Job-Plus Community Supports for Work program.</p> <ol style="list-style-type: none"> 1. Relationship between SAHA and resident ambassadors: The residents were no longer compensated through stipends. Instead, SAHA hired residents as part-time temporary employees. The reason for the change was to promote the employment and training aspect of this activity. Under the redesigned activity, all participants are expected to adhere to training and professional development plans that include performance evaluations and demonstration of capacity building. 2. Job-Plus Community Supports for Work program: This program parallels the ambassador program. Under Jobs-Plus, the ambassadors are referred to as Community Coaches and are expected to apply, compete, and demonstrate growth within the program. 		

Activity	Name/Description	Statutory Objective	Update
FY2011-1e	Preservation and expansion of affordable housing	Increase housing choices	<p>Proposed changes: <u>Remove metric:</u> “Number of Public Housing units replaced for other low-income housing units.” <u>Add metric:</u> “Number of affordable housing units added by the end of FY2014.” <u>Baseline:</u> 0 <u>Benchmark:</u> 610 <u>Authorizations:</u> Attachment C, Section B1 (Single Fund Budget with Full Flexibility), specifically Section B1(b)(ii) referencing the acquisition, new construction, reconstruction or moderate or substantial rehabilitation of housing, and Section B1(b)(vii) referencing the preservation of Public Housing and/or Housing Choice Voucher units.); Attachment D (Use of MTW Funds for Local, Non-Traditional Activities)</p>
	<p>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. Multiple financing sources will be used to achieve the goals for preservation and expansion. Capital improvements to existing properties will be made to extend the life of a property, improve livability, and decrease operating expenses. Expansion will be done in areas that achieve multiple community goals and include deeply subsidized housing.</p> <p>As such, SAHA proposed to utilize MTW’s flexible use of funds to preserve and expand housing for low-income families. SAHA has several communities in pre-development, including San Juan Square III, a mixed-income community of 252 units; and Sutton Oaks 2, a new mixed-income, multi-family community consisting of 208 units. SAHA will also develop 11 affordable single family houses as part of its Leigh Street Homes phase for Victoria Commons. These homes will be sold to first-time homebuyers with incomes at or below 80% of AMI.</p> <p>The agency has also developed a Choice Neighborhood Initiative Transformation Plan for the Wheatley Courts development. The plan proposes 383 units, of which 242 units will be reserved for families at 30% of AMI.</p>		

Activity	Name/Description	Statutory Objective	Update
FY2011-2	Simplify and streamline HUD approval process for the development, redevelopment, and acquisition of PH	Increase housing choices	Propose to close out. Recent reduced transaction times have reduced the need for this activity.
	This activity simplifies and streamlines the HUD approval process in accordance with HUD's Proposed Rule for the "Streamlined Application Process in Public/Private Partnerships for Mixed-Finance Development of Public Housing Units" as published in the Federal Register on December 27, 2006.		
FY2011-3	Biennial reexamination for elderly/disabled (PH)	Reduce cost and increase cost effectiveness	Propose to close out. Replaced by new activities FY2014-4 and FY2014-5.
	In January, 2011, the Elderly and Disabled portfolio of Public Housing began biennial re-certification for all families on 100% fixed income. This activity is proposed to be replaced by new activities that provide new definitions of households eligible for Biennial Reexaminations and Triennial Reexaminations.		
FY2011-4	Streamline methods of verification for PH and HCV	Reduce cost and increase cost effectiveness	Propose to close out. Replaced by new activity FY2014-1.
	While continuing the mandatory use of the Enterprise Income Verification (EIV) report, HCV staff transitioned from the use of third-party verification of income from employers to the use of participant-provided documents. SAHA continues to use oral verifications and/or mailed third-party verification in the event of a discrepancy or if documents appear altered. The agency also employs quality control measures to randomly select participant accounts and require additional verification to ensure the integrity of the verification process. Third-party verification of assets is still required for assets totaling a value of \$25,000 or more.		

Activity	Name/Description	Statutory Objective	Update
FY2011-5	Requirements for acceptable documents for PH and HCV	Reduce cost and increase cost effectiveness	Propose to close out. Replaced by new activity FY2014-1.
	In addition to streamlining methods of document verification (FY2011-4), SAHA wanted to reduce the number of applicants and participants resubmitting documents for approved extension of voucher, and/or reasonable accommodations. SAHA proposed to change the policy regarding the length of time that applicant/participant provided documents would be valid for verification purposes. Applicant-provided documents dated from 60 to 90 calendar days from the eligibility appointment and participant-provided documents dated from 120 to 180 calendar days from the recertification appointment would be valid.		
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	Increase housing choices	Implemented and ongoing. No changes proposed to activity or authorizations.
	This activity is used in conjunction with activity FY2011-6, and allows SAHA to commit PBV to developments in proportions greater than 25% of the units. This will help to preserve affordable housing and provide additional low-income housing opportunities. SAHA may offer some supportive services for these developments, but needs the flexibility not to offer such services for every unit where PBV will be committed. Steps were taken during the first plan year to prepare for implementation of this activity, including securing HUD approvals, securing environmental reviews, and engaging a third-party contractor to establish contract rents.		

Activity	Name/Description	Statutory Objective	Update
FY2011-8	Revise mobility rules for PBV	Increase housing choices	Implemented and ongoing. No changes proposed to activity or authorizations.
	SAHA proposes that PBV households have priority for the first available tenant-based voucher after two years, rather than one year, of occupancy. This would assist efforts to stabilize occupancy at the first development where PBV will be committed, the Springhill development, as well as other developments where SAHA may commit PBV units. Steps were taken during the first plan year to prepare for implementation of this activity, including securing HUD approvals, securing environmental reviews, and engaging a third-party contractor to establish contract rents.		
FY2011-9	Allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who will provide supportive services to those households	Increase housing choices	<p>Propose removing two metrics:</p> <ul style="list-style-type: none"> • Cost of services that each family receives • Average earned income of households who are provided housing and services under set-aside vouchers <p>These metrics do not effectively measure the success of set-aside voucher allocation. SAHA will measure the success of this activity by the number of vouchers committed and the number of households served after two years.</p>
	SAHA will allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who commit to provide supportive services. The set-asides would be for households with specific priority needs, such as those who are homeless. Steps were taken during the first plan year to prepare for implementation of this activity, included soliciting proposals from interested supportive service provider partners, selecting the households to be referred for vouchers, subject to income eligibility and other voucher program requirements, and drafting MOU's with partners. The partners selected in June are The Center for Health Care Services (CHCS) and San Antonio Metropolitan Ministries (SAMM).		

Activity	Name/Description	Statutory Objective	Update
FY2012-10	Biennial Reexamination for Elderly/Disabled Participants on Fixed Income (HCV)	Reduce cost and increase cost effectiveness	Propose to close out. Replaced by FY2014-4.
	SAHA conducts biennial recertification for elderly/disabled HCV participant households that are on 100% fixed income. SAHA initially used random selection methods and tools to select elderly and disabled voucher participants in scheduling recertifications. Half of the HCV participants were on a two year recertification cycle starting in the first year and the remainder starting in the second year of program implementation. Every family has the option of interim recertification at any time if there is a change in family composition, reduction in income or an increase in medical expenses.		
FY2012-11	Local Project Based Voucher Program for Former Public Housing Residents	Increase housing choices	Closed out before implementation due to discussions with HUD about RAD option.
	<p>With respect to public housing units that have been disposed of and converted to project-based vouchers (PBV), SAHA may modify the PBV program policy for former public housing residents, including but not limited to continuation of Family Self-Sufficiency participants, which lived in units that have been disposed of or converted into PBV units. This activity will allow households paying public housing flat rents to continue to pay such rents or transitional higher rents that remain below 30% of their adjusted incomes.</p> <p>With respect to pro-rated households who otherwise would see a significant rent increase, this activity allows SAHA related-entity owners of the PBV units to request lower contract rents for those families' units without affecting rent comparability for other units at the developments; and allows utility allowances consistent with the utility allowances the households were paying on the units in the public housing program, which may be more or less than the utility allowances that would be paid with respect to such units under the voucher program; and make any other necessary rent or occupancy policy adjustments to provide minimal negative impact to former public housing residents.</p>		

Activity	Name/Description	Statutory Objective	Update
FY2013-1	Time-limited Working Household Preference Pilot Program	Increase housing choices, promote self-sufficiency	<ul style="list-style-type: none"> • Developing tracking system • Implementation planned to correspond with the new online waiting list for PH in May/June of this fiscal year (FY13 Q4)
	<p>This pilot project (max 200 households) for public housing residents creates an optional working household waiting list preference to provide time-limited housing assistance. Households who choose to apply under this preference would receive five years of housing assistance, with a two-year extension, if needed based on hardship.</p> <p>When this preference becomes available, SAHA will inform waiting list applicants via written notice (letter) describing the preference, emphasizing the time-limited nature of the housing assistance, and providing instructions on how to select the preference. When applicants who have selected this preference are called in from the waiting list, staff will ensure that the applicants understand that a time limit is associated with the preference.</p> <p>Hardship policies mirror FSS practices and policies: SAHA can extend the term of the assistance up to 2 years if the family provides a written request for an extension and SAHA finds that good cause exists for the extension. FSS participation is required -- each FSS family will receive case management services from a FSS Case Manager who maintains close communication with the family and works with them to develop an Individual Training and Service Plan (ITSP). The ITSP establishes specific interim and final goals to measure the family's progress toward fulfilling its obligations and becoming self-sufficient.</p>		

Activity	Name/Description	Statutory Objective	Update
FY2013-2	Simplified Earned Income Disregard (EID)	Promote self-sufficiency, Reduce cost and increase cost effectiveness	<ul style="list-style-type: none"> • Addressing software system, including: system-generated contracts for escrow accounts and inability to calculate EID without a manual override • Currently researching ability to reconcile various program requirements around escrows and EID
	<p>This activity expands the number of months for which EID is available to participants 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:</p> <ul style="list-style-type: none"> o During year 1, 100% of earned income is disregarded o Year 2: 50% o Year 3: 25% o Year 4: 20% o Year 5: 10% <p>Head, spouse, or co-head of household qualifies entire household (formerly only Head of Household could participate). New FSS participants who use EID would not make use of escrow. Program does not change for current FSS participants, who may continue to use their escrow.</p> <p>The activity is available to both public housing residents and HCV participants. Currently, the HCV program only offers EID to participants who are disabled. The simplified EID would be available to HCV households whose head, spouse, or co-head qualifies as disabled. The simplified EID would be available to all public housing residents.</p>		

Activity	Name/Description	Statutory Objective	Update
FY2013-3	Standardize Section 8 and Public Housing Inspection Progress	Reduce cost and increase cost effectiveness	<ul style="list-style-type: none"> • On hold, pending results of HUD tests at other PHAs
	This activity unifies Section 8 and Public Housing inspection standards. The intent is to raise lower standards to a higher, uniform level. It is anticipated that UPCS (public housing) would serve as model for most elements, but some may be derived from HQS (section 8).		
FY2013-4	HQS Inspection of SAHA-owned non-profits by SAHA inspectors	Reduce cost and increase cost effectiveness	<ul style="list-style-type: none"> • Implemented on January 1, 2013 • Expect to have result by FY13 Q4 • No changes proposed to activity or authorizations.
	SAHA inspectors (instead of 3rd-party contractors) are used to inspect SAHA-owned non-profits and related entities, and to perform rent reasonableness assessments.		

VII. Sources and Uses of Funding

A. List planned sources (Operating, Capital, and HCV) and uses of MTW Funds (excluding HOPE VI)

As a block grant agency, SAHA combines PH, HCV, and Capital Fund Program (CFP) resources into a single fund with full funding flexibility. The table below details SAHA's planned sources and uses of funds for the fiscal year ending June 30, 2014.

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 Grants from HUD
- Replacement Housing Factor Grants from HUD (these funds were inadvertently included as MTW Sources in the approved 2012 MTW Plan but were not drawn for MTW uses). RHF funds will not be added to the MTW block grant until SAHA has a fully executed RHF amendment and approved RHF Plan, which is currently pending HUD approval.

Uses of MTW Funds include the following:

- Salaries and Benefits, Repair Maintenance, Utilities, Protective Salaries (Security Services), Insurance, and Other Expenses represent the combined operating costs for PH and HCV.
- Housing Assistance Payments (HAP) Expense for the HCV Program identifies the payments to landlords.
- The CFP funds include activities related to the preservation and expansion of affordable housing.
- Compliance Programs include costs related to the assurance of compliance with federal regulations for all programs which foster self-sufficiency.
- Self-Sufficiency activities include job training, child care training and assistance, transportation assistance, co-location of agencies, training for staff for implementation of holistic case management model, as well as wages for the Resident Ambassador Program.

Proposed Consolidated Sources and Uses of MTW Funds		
Fiscal Year Ending June 30, 2014		
SOURCES		
HCV (HAP & Administrative Fees)	96,107,816.00	
Public Housing Operating Subsidy	19,132,459.00	
Public Housing Rental & Other Income	12,431,772.00	
Public Housing Capital Grants	\$3,601,189	
Replacement Housing Factor Grants ¹	\$2,246,396	
TOTAL SOURCES		\$133,519,632
USES		
Capital & Other Priorities:		
Public Housing Capital Uses	\$5,847,585	
Preservation and Expansion of Affordable Housing (approved per resolution 5355):		
• Choice implementation matching grant for Wheatley Courts transformation.	\$5,000,000	
• Two year workplan to preserve and expand affordable housing	\$8,000,000	
Operations:		
Salaries & Benefits	\$16,360,733	
Repair & Maintenance	\$7,292,370	
Utilities	\$4,798,377	
Safety & Security	\$567,826	
Insurance	\$1,261,207	
Other Expenses (Includes technology/licensing fees, computer/telephone, consulting fees, etc...)	\$4,195,497	
Management Fees	\$8,314,531	
HAP Expense for HCV Program	\$88,855,726	
Compliance Programs	\$192,128	
Self-Sufficiency Activities including Grant Matching Funds	\$900,000	
TOTAL USES		\$151,585,980
TRANSFERS, RESERVES & NET INCOME		
MTW Reserve Drawdown		\$18,066,348
Balanced Budget		\$0

Notes:

1: Replacement Housing Factor Grants contingent upon HUD approval of the Fourth Amendment to Moving to Work Agreement.

On 06/07/2013 the Board of Commissioners approved resolution 5355 which obligated funds consistent with our MTW plan:

- To enable Section 8 to continue to serve residents after Sequestration and funding cuts - \$2.7 Million
- To enable Public Housing to continue to serve residents after Sequestration and funding cuts - \$1.4 Million

- Program administration and implementation of MTW initiatives; increase the number of participants in the PH and HCV FSS and the EID to over 1,200 participants; increase the number of Resident Councils by 10%; establish and expand educational programs for children and adults; explore opportunities to establish and expand health and wellness and arts and culture programs - \$0.9 Million
- Expansion: Choice implementation matching grant for Wheatley Courts transformation - \$5.0 Million
- Two year workplan to preserve and expand affordable housing - \$8.0 Million

B. List planned sources and uses of State or local funds

SAHA is not a recipient of state or local funds.

C. If applicable, list planned sources and uses of the COCC

Sources and uses of the COCC include activities related to the management of the Public Housing, Housing Choice Voucher Program, and Capital Fund Programs.

Consolidated Sources and Uses of Central Office Cost Center		
Fiscal Year Ending June 30, 2014		
SOURCES		
Contract Billing	\$1,106,667	
Other Revenue	\$303,466	
Management Fee	\$5,874,861	
Bookkeeping Fee	\$1,902,623	
Asset Management Fee	\$1,147,480	
CFP Management Fee	\$703,240	
Fee for Service	\$532,706	
TOTAL REVENUE		\$11,571,043
USES		
Salaries and Benefits	\$8,937,985	
Repair & Maintenance	\$192,703	
Utilities	\$241,011	
Protective Salaries	\$221,114	
Insurance	\$158,048	
Other Expenses	\$1,543,178	
TOTAL EXPENSES		\$11,294,039
SURPLUS OR (DEFICIT)		\$277,004

Notes:

- “Protective Salaries” refers to security services

D. If using a cost allocation or fee-for-service approach that differs from 1937 Act requirements, describe the actual deviations

Not applicable.

E. List or describe planned use of single-fund flexibility

SAHA combines the Public Housing, HCV Program and capital fund resources into a single authority-wide funding source with full funding flexibility. SAHA has used the single fund block grant to provide funding for:

- Operating fund subsidies to the Public Housing portfolio
- Capital Funds for the Public Housing portfolio
- HAP payments
- HCV administrative operating costs
- Other MTW Activities
- Development-related activities and planning

F. Optional - List reserve balances at the beginning of the plan year

Not applicable.

G. Optional - In plan appendix, provide planned sources and use by AMP

Not applicable.

VIII. Administrative

A. Resolution signed by the Board of Commissioners, or other authorized PHA official if there is no Board of Commissioners, adopting the Annual MTW Plan Certification of Compliance

See Appendix 1.

B. Description of any planned or ongoing Agency directed evaluations of the demonstration, if applicable.

Not applicable.

Appendix 1: Resolutions and Certifications

SAN ANTONIO HOUSING AUTHORITY

Resolution 5332

RESOLUTION 5332, AUTHORIZING THE 2013-2014 MOVING TO WORK (MTW) AGENCY PLAN, INCLUDING REVISIONS TO THE MTW PLAN, THE PUBLIC HOUSING ADMISSIONS AND CONTINUED OCCUPANCY POLICY (ACOP), THE HOUSING CHOICE VOUCHER ADMINISTRATIVE PLAN AND THE CAPITAL FUND PROGRAM.

WHEREAS, the Board of Commissioners of the San Antonio Housing Authority, a public instrumentality created pursuant to the laws of the State of Texas ("SAHA") approved the 2013-2014 Moving to Work (MTW) Agency Plan for fiscal year 2013-2014 including the revised MTW Plan, Public Housing Admissions and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan and the Capital Fund Program; and

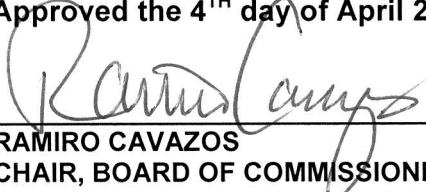
WHEREAS, the Board of Commissioners of the San Antonio Housing Authority now desires to authorize the submission of the 2013-2014 MTW Agency Plan to the U.S. Department of Housing and Urban Development ("HUD"); and

WHEREAS, the Board desires to authorize the Chairman and the President and CEO to execute and submit to HUD such certifications and other documents that they deem necessary or advisable in connection with the submission of the MTW Agency Plan.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of SAHA hereby:

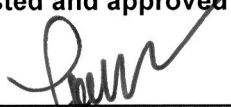
- 1) Approves Resolution 5332 authorizing Fiscal Year 2013-2014 Moving to Work Agency Plan and revised MTW Plan, Public Housing and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan, and the Capital Fund Program, and their submission to HUD.

Approved the 4TH day of April 2013.



RAMIRO CAVAZOS
CHAIR, BOARD OF COMMISSIONERS

Attested and approved as to form:



LOURDES CASTRO RAMIREZ
SAHA PRESIDENT AND CEO

Civil Rights Certification

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
Expires 08/30/2011

Civil Rights Certification

Annual Certification and Board Resolution

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioner, I approve the submission of the Plan for the PHA of which this document is a part and make the following certification and agreement with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990, and will affirmatively further fair housing.

San Antonio Housing Authority

PHA Name

TX006

PHA Number/HA Code

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official
Lourdes Castro Ramirez

Title President and CEO

Signature

Date

4/12/13

Annual Moving to Work Plan
Certifications of Compliance

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

**Certifications of Compliance with Regulations:
Board Resolution to Accompany the Annual Moving to Work Plan**

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the PHA fiscal year beginning July 1, 2013, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

1. The PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the PHA conducted a public hearing to discuss the Plan and invited public comment.
2. The Agency took into consideration public and resident comment before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan;
3. The PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
4. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identify any impediments to fair housing choice within those programs, address those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and maintain records reflecting these analyses and actions.
5. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
6. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
7. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
8. The PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
9. The PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.

10. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
11. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
12. The PHA will provide HUD or the responsible entity any documentation that the Department needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58.
13. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
14. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
15. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
16. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments.).
17. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
18. All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its Plan and will continue to be made available at least at the primary business office of the PHA.

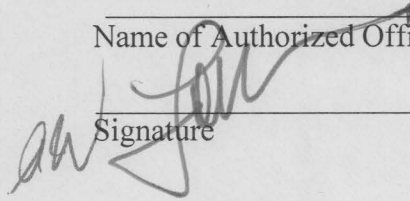
San Antonio Housing Authority
PHA Name

TX006
PHA Number/HA Code

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Lourdes Castro Ramirez
Name of Authorized Official

President and CEO
Title


Signature

7-22-13
Date

San Antonio Housing Authority

Resolution 5338

RESOLUTION 5338, AUTHORIZING A FOURTH AMENDMENT TO THE MOVING TO WORK (MTW) AGREEMENT.

WHEREAS, a public hearing on this item was held on September 20, 2012 during the Operations & Human Resources Committee Meeting; and

WHEREAS, HUD requires that action be taken by the Board of Commissioners for final execution of any amendment to the MTW Agreement; and

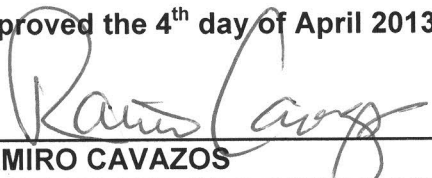
WHEREAS, the Board of Commissioners certifies that the public comment requirement has been met; and

WHEREAS, this resolution would authorize inclusion of replacement housing factor ("RHF") funds into the pre-existing single, authority-wide funding source ("MTW Funds"), making RHF funds available to contribute to MTW Activities and uses of MTW Funds in accordance with the MTW Plan.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of SAHA hereby:

Approves Resolution 5338 authorizing the Fourth Amendment to the Moving to Work (MTW) Agreement between the U.S. Department of Housing and Urban Development and the San Antonio Housing Authority and the execution of documents in connection therewith.

Approved the 4th day of April 2013.



RAMIRO CAVAZOS
CHAIR, BOARD OF COMMISSIONERS

Attested and approved as to form:



LOURDES CASTRO RAMIREZ
PRESIDENT AND CEO

Appendix 2: REPLACEMENT HOUSING FACTOR (RHF) PLAN - 2013/2014

SAHA plans to combine RHF funds into the MTW block grant and intends to accumulate the RHF grants.

Notes:

1. This RHF Plan is pending finalization of amendment to MTW Agreement with HUD to allow for deposit of RHF Funds in the MTW Block Grant and the receipt of second increment RHF Funds.
2. Sutton Homes Phase II: Project Currently Under Construction (9% Tax Credit / Mixed Finance); "Proportionality Test" conducted by HUD Headquarters as part of the Panel Review.
3. Column L: Total Available Funds To Date: \$6,725,396 - These funds will go into the MTW Program
4. Column M: San Juan Phase III will absorb approximately \$4,429,000 of the \$6.7 million (Proportionality Test Below). This is a 4% Tax Credit / Mixed Finance Project
5. Column N: SAHA's Plan with the Remaining/Currently Available Funds (\$2,246,396 - Column N) is to Construct or Acquire PH Units; Total Number is yet To Be Determined but will be equal to, or greater than the total allowed under the 2012 TDC Limits (TDC Per Unit Minimum: 11 units). SAHA will develop and/or acquire the requisite number of affordable and/or public housing units required under the "Proportionality Test". SAHA used 3 bedroom units in the Test since, based on our PH waiting list, these are in high demand. SAHA will secure a firm commitment for the required 1/3 leverage prior to disbursing any of the RHF funds.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
REPLACEMENT HOUSING FACTOR PROGRAM (RHF)											Adjusted Available		Adjusted Available
Grant	Grant Number	Increment	OB End Date	EX End Date	Grant Amount	Obligated	Expended	Available		Sutton II	After Sutton II	San Juan III (SJIII)	After San Juan III
										\$ 3,030,260.57		\$ 4,429,000.00	
2006	TX59R006502-06	2nd	10/29/2013	7/29/2014	\$ 2,608,481.00	\$ -	\$ -	\$ 2,608,481.00		\$ 2,608,481.00	\$ -	\$ -	\$ -
2008	TX59R006502-08	2nd	10/29/2013	10/29/2015	\$ 2,593,345.00	\$ 1,971,364.43	\$ -	\$ 621,980.57		\$ 421,779.57	\$ 200,201.00	\$ -	\$ 200,201.00
2009	TX59R006502-09	2nd	10/29/2013	10/29/2015	\$ 1,408,098.00	\$ -	\$ -	\$ 1,408,098.00			\$ 1,408,098.00	\$ 1,408,098.00	\$ -
2009 (2)	TX59R006504-09	2nd	10/29/2013	10/29/2015	\$ 1,119,306.00	\$ -	\$ -	\$ 1,119,306.00			\$ 1,119,306.00	\$ 1,007,375.40	\$ 111,930.60
2010	TX59R006502-10	2nd	10/29/2013	10/29/2015	\$ 1,810,724.00	\$ -	\$ -	\$ 1,810,724.00			\$ 1,810,724.00	\$ 1,629,651.60	\$ 181,072.40
Subtotal To Be Obligated By October 29, 2013:										\$ 7,568,589.57			\$ 493,204.00
										subtotal:	\$ 4,538,329.00		
*2011	TX59R006501-11	1st	8/2/2013	8/2/2015	\$ 661,479.00	\$ -	\$ -	\$ 661,479.00			\$ 661,479.00	\$ -	\$ 661,479.00
2011	TX59R006502-11	2nd	8/2/2013	8/2/2015	\$ 425,726.00	\$ -	\$ -	\$ 425,726.00			\$ 425,726.00	\$ 383,875.00	\$ 41,851.00
Subtotal To Be Obligated By August 2, 2013:										\$ 1,087,205.00			\$ 703,330.00
										subtotal:	\$ 1,087,205.00		
2012	TX59R006501-12	1st	3/11/2014	3/11/2016	\$ 520,769.00	\$ -	\$ -	\$ 520,769.00			\$ 520,769.00		\$ 520,769.00
2012	TX59R006502-12	2nd	3/11/2014	3/11/2016	\$ 76,939.00	\$ -	\$ -	\$ 76,939.00			\$ 76,939.00		\$ 76,939.00
Subtotal To Be Obligated By March 11, 2014										\$ 597,708.00			\$ 597,708.00
										subtotal:	\$ 597,708.00		
2009	TX59R006501-09	1st	10/29/2015	7/29/2017	\$ 91,863.00	\$ -	\$ -	\$ 91,863.00			\$ 91,863.00		\$ 91,863.00
2010	TX59R006501-10	1st	10/29/2015	10/29/2017	\$ 360,291.00	\$ -	\$ -	\$ 360,291.00			\$ 360,291.00		\$ 360,291.00
Subtotal To Be Obligated By October 29, 2015:										\$ 452,154.00			\$ 452,154.00
										subtotal:	\$ 452,154.00		
GRAND TOTAL AVAILABLE:										\$ 9,705,656.57			\$ 2,246,396.00
										GRAND:	\$ 6,675,396.00	GRAND:	\$ 2,246,396.00
										4/12/12	10/4/12	After SJIII: 3/1/13	

PROPORTIONALITY TEST - 1st & 2nd Increment Funds			
San Juan Homes Phase III - New Construction			
2012 Unit Total Development Cost (TDC) Limits - Region VI			
Walkup			
Bedrooms	# of Units	TDC Limits	
1	3	\$121,914	\$365,742
2	33	\$155,139	\$5,119,587
3	24	\$203,112	\$4,874,688
4	3	\$252,320	\$756,960
TOTALS:	63		\$11,116,977

PROPORTIONALITY TEST - 1st & 2nd Increment - Available (\$)			
Future Project - New Construction or Acquisition			
2012 Unit Total Development Cost (TDC) Limits - Region VI			
Walkup	Current		Must Construct
Bedrooms	Available Funds	TDC Limits	# of Units
3	\$2,296,757	\$203,112	11

San Juan Phase III RHF Contribution:			
	# of Units	Per Unit Cost	RHF Contribution
	63	\$70,302	\$4,429,000

FUTURE 1ST INCREMENT FUNDING

Future 1st Increment Funding (2013 & 2014) is estimated at \$520,769 each year (total: \$1,041,538 for 2 years); Total Number of units to be constructed or acquired is yet To Be Determined but will be equal to, or greater than the total allowed under the 2012 TDC Limits (TDC Per Unit Minimum: 5 units). SAHA will develop and/or acquire the requisite number of affordable and/or Public Housing units required under the "Proportionality Test". SAHA used 3 bedroom units in the Test since, based on our PH waiting list, these are in high demand. SAHA will secure a firm commitment for the required 1/3 leverage prior to disbursing any of the RHF funds.

PROJECTION OF FUTURE FUNDS USING 2012 AMOUNTS			
Grant Number:	OB Date:	EX Date:	Amount:
TX59R006501-1	2015	2017	\$520,769
TX59R006501-1	2016	2018	\$520,769
			\$1,041,538
PROPORTIONALITY TEST - FUTURE 1st INCREMENT - Estimate (\$)			
Future Project's - New Construction or Acquisition			
2012 Unit Total Development Cost (TDC) Limits - Region VI			
Walkup	Current		Must Construct
Bedrooms	Available Funds	TDC Limits	# of Units
3	\$1,041,538	\$203,112	5

FUTURE 2ND INCREMENT FUNDING

Future 2nd Increment Funding (2013 & 2014) is estimated at \$76,939 each year (total: \$153,878 for 2 years); Total Number of units to be constructed or acquired is yet To Be Determined but will be equal to, or greater than the total allowed under the 2012 TDC Limits (TDC Per Unit Minimum: 1 unit). SAHA will develop and/or acquire the requisite number of affordable and/or Public Housing units required under the "Proportionality Test". SAHA used 3 bedroom units in the Test since, based on our PH waiting list, these are in high demand. SAHA will secure a firm commitment for the required 1/3 leverage prior to disbursing any of the RHF funds.

PROJECTION OF FUTURE FUNDS USING 2012 AMOUNTS			
Grant Number:	OB Date:	EX Date:	Amount:
TX59R006502-1	2015	2017	\$76,939
TX59R006502-1	2016	2018	\$76,939
			\$153,878
PROPORTIONALITY TEST - FUTURE 2nd INCREMENT - Estimate (\$)			
Future Project's - New Construction or Acquisition			
2012 Unit Total Development Cost (TDC) Limits - Region VI			
Walkup	Current		Must Construct
Bedrooms	Available Funds	TDC Limits	# of Units
3	\$153,878	\$203,112	1