



## **Moving to Work**

# **Annual MTW Plan- FY2018**

San Antonio Housing Authority | 818 S. Flores | San Antonio, TX 78204 | [www.saha.org](http://www.saha.org)

*DRAFT*      *April 15, 2017*  
*Final Submitted: July 20, 2017*

## **SAHA Board of Commissioners**

Morris Stribling, DPM, Chairman  
Charles Muñoz, Vice Chairman  
Thomas F. Adkisson  
Francesca Caballero  
Charles Clack  
Marie R. McClure  
Jessica Weaver

## **SAHA Executive Staff**

David Nisivoccia, President and Chief Executive Officer  
Tim Alcott, Development Services and Neighborhood Revitalization Officer  
Ed Hinojosa, Chief Financial Officer  
Muriel Rhoder, Chief Administrative Officer  
Jo Ana Alvarado, Director of Innovative Technology  
David Clark, Director of Housing  
Domingo Ibarra, Director of Security  
Diana Kollodziej Fiedler, Director of Finance and Accounting  
Adrian Lopez, Director of Community Development Initiatives  
Hector Martinez, Director of Construction Services & Sustainability  
Richard Milk, Director of Policy and Planning  
Steve Morando, Director of Procurement and General Services  
Rosario Neaves, Director of Communications and Public Affairs  
Brandee Perez, Director of Assisted Housing Programs  
Lorraine Robles, Director of Development Services and Neighborhood Revitalization  
Janie Rodriguez, Director of Human Resources  
Thomas R. Roth, Director of Asset Management

## **SAHA Moving to Work Staff**

Richard Milk, Director of Planning and Policy  
Sara Eaves, GIS & MTW Program Analyst

## **Contributing SAHA Staff**

Gary Baxter, Madlyn Bowen, David Casso, Roman Castorena, Lori Hall, Aiyana Longoria, Silvia Lozano, Ramiro Maldonado, Rosario Plascencia, Katherine Ramirez, Roberto Ramirez, Susan Ramos-Sossaman, and Joel Tabar

## Contents

Section I. Introduction .....	5
Section II. General Housing Authority Operating Information.....	15
A. Housing Stock Information .....	15
B. Leasing Information.....	22
C. Waiting List Information.....	24
Section III. Proposed MTW Activities.....	26
Section IV. Approved MTW Activities.....	27
A. Implemented Activities .....	27
1. FY2011-1e: Preservation and Expansion of Affordable Housing.....	27
2. FY2011-9: Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services.....	29
3. FY2013-2: Simplified Earned Income Disregard (EID) (Public Housing).....	31
4. FY2013-4: HQS Inspection of SAHA-owned non-profits by SAHA inspectors.....	35
5: FY2014-2: Early Engagement .....	37
6. FY2014-3: Faster Implementation of Payment Standard Decreases (HCV).....	39
7. FY2014-4: Biennial Reexaminations (HCV & PH).....	40
8. FY2014-5: Triennial Reexamination (HCV) .....	45
9. FY2014-6: Rent Simplification (HCV).....	47
10. FY2015-1: MDRC / HUD Rent Study .....	50
11. FY2015-2: Elderly Admissions Preference at Select Public Housing Sites .....	70
12. FY2015-3: Modified Project Based Vouchers.....	75
13. FY2015-4: Simplified Utility Allowance Schedule .....	78
14. FY2016-2- Biennial and Triennial Notification of Rent Type Option .....	81
B. Not Yet Implemented Activities.....	82
15. FY2017-1: Time-limited Working Household Referral Program.....	82
16. FY2017-2: Restorative Housing Pilot Program.....	89
C. Activities On Hold.....	95
D. Closed Out Activities .....	95
FY2013-3 Standardize Section 8 and Public Housing Inspection Progress .....	97
Section V. Sources and Uses of Funds.....	98
Activities that Will Use Only MTW Single Fund Flexibility.....	99
A. Education Partnerships.....	100
B. Resident Ambassador Empowerment Program.....	100
C. Summer Youth Program .....	100
D. Health and Wellness.....	100
E. Choice Neighborhoods Initiative .....	100
Section VI. Administrative .....	105
Appendix 1: Resolutions and Certifications .....	108
Appendix 2: Annual Statement/Performance and Evaluation Report (HUD 50075.1) and Replacement Housing Factor (RHF) Plan - 2017/2018.....	112
Appendix 3: Preservation and Expansion of Affordable Housing Policy .....	132



## **Section I. Introduction**

The San Antonio Housing Authority (SAHA) provides housing to 65,000 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 \$186 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**

### **A. FY2018 Update Summary**

This year's MTW Plan proposes no new activities and makes minor updates to existing activities to facilitate implementation, measurement, and/or reporting.

### **B. Overview of Short and Long-term MTW goals and objectives**

On June 25, 2012, the Board of Commissioners formally approved SAHA's new Strategic Plan. Three elements comprise the core of the plan: 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**

Empower and equip families to improve their quality of life and achieve economic stability.

Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service.

Preserve and improve existing affordable housing resources and opportunities.

Strategically expand the supply of affordable housing.

Transform core operations to be a high performing and financially strong organization.

Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.

The Agency’s MTW Plan and Strategic Plan are closely integrated. Strategic Plan goals articulate and reinforce the three statutory MTW goals. 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 captured in Strategic Plan progress reports.

### Long-term MTW Plan

Over the course of FY2018, SAHA will develop long-term goals, objectives, metrics and targets for each of the three MTW statutory objectives. When complete, these plan elements will provide long-term guidance to facilitate short-term decision-making as well as development of new MTW activities. These plan elements will guide the implementation of multi-year projects. This process is anticipated to take six months to one year.

### Strategic Plan

SAHA’s Strategic Plan establishes six long-term strategic goals to be achieved by 2020. In order to ensure timely progress towards those goals, SAHA develops annual Strategic Implementation Plans that set out annual objectives for the fiscal year. Progress is measured by tracking key metrics for each strategic goal. The first of the following tables lists the key metrics assigned to each strategic goal. The second table shows the relationship between the long term strategic goals and annual objectives.

### Key Strategic Goal Metrics

*Metrics in boldface are MTW Standard Metrics.*

Strategic Goal	Metric	Definition
1: Empower and equip families to improve their quality of life and achieve economic stability.	Education Attainment	% of 19 and older adults with an education level of 12 or more; Level 12 indicating GED/HS Diploma
	Employment rate of residents/ participants (FT equivalent)	% of work-able adults that are employed at or above minimum FTE work level
	Employment rate of residents/ participants (PTE and FTE)	% of work-able adults that are employed at or above minimum PTE work level
	Earned income	Median earned income of SAHA-assisted adults working at a full-time equivalent
	<b>SS #8: Self Sufficient</b>	<b>Number of households transitioned to self-sufficiency.</b>
2: Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and	Performance Evaluations Completed on time, %	Percentage of complete and correct evaluations submitted to HR within 30 days of anniversary date (hire date or promotion date)
	External client satisfaction, %	TBD
	Employee turnover rate	Number of employees that have left divided by the total number of employees (for the period)
	Training commitment	Ratio of dollar amount set aside for training in each department’s budget (to include tuition reimbursement,

strong customer service.		professional certification activities) to dollar amount spent for training
	Value of benefits	\$ in medical, life insurance, disability, and dental/vision benefits, per employee
	Wellness programs	\$ invested in SAHA wellness programs
3: Preserve and improve existing affordable housing resources and opportunities	<b>MTW HC #2: Units of Housing Preserved</b>	<b>Number of housing units preserved for households at or below 80% AMI that would otherwise not be available</b>
	Units of Housing Preserved (non-MTW)	Units of affordable housing preserved
	Funds obligated	Amount of dollars contractually obligated for asset preservation projects.
	Percentage of contract completed	Percentage of contract completed for asset preservation projects.
	Work order days closed within 2 days, %	Percentage of work orders closed out within 2 days
	Emergency Work Orders completed same day, %	Percentage of emergency work orders completed the same day of being ordered
4: Strategically expand the supply of affordable housing	Units acquired or built (completed)	Total sum of all units acquired or built
	Funds expended on units acquired or built (completed)	Federal dollars invested
	Funding leveraged	Dollar value of non-federal funds invested in expansion
	Post-partnership units	Number of units that come back to SAHA ownership after partnership compliance period expires
	Voucher value	Dollar value of new vouchers secured
	Additional vouchers secured	Number of new, competitive vouchers secured
5: Transform core operations to be a high performing and financially strong organization.	Occupancy (%)	(Total Standing Units minus Vacant Units) divided by Total Standing Units. This measure accounts for units such as agency, litigation, fire, etc. that are not occupied by a tenant but do not count against the occupancy rate.
	<b>Utilization ~ MTW Baseline</b>	<b>Voucher utilization based on MTW baseline</b>
	Average HAP	Average HAP per unit
	HCV Scorecard	Scorecard score
	Non-Profit DSCR	Debt service coverage ratio
	<b>MTW Total # of Households Assisted</b>	<b>Number of MTW households assisted through MTW using the MTW baseline methodology set forth in PIH-2013-02. Includes all PH households, all MTW Voucher Households, and "Other" households defined as non-PH and Non-S8 households occupying a unit reserved for &lt;80% AMI at any MTW funded development.</b>
	PH NOI	NOI per year per unit
	Deferred Maintenance, PH	\$ millions (value of Categories 1, 2, and 3)
	Deferred Maintenance, NP	\$ millions (value of Categories 1, 2, and 3)
	PHAS Score	overall PHAS score for SAHA
	Non Profits Score	Aggregate [scorecard] score for Non Profits
Partnerships Score	Aggregate [scorecard] score for Partnerships	
6: Develop a local and national	Agency Awards/Recognition	Number of national, state, and local awards for agency programs

reputation for being an effective leader, partner, and advocate for affordable housing and its residents.	State and National Representation	number of state or national trade group associations (partner industries), committees or boards on which at least one SAHA representative is serving, to include presentations at conferences
	Local Leadership and Representation	Staff participating in external leadership programs (LSA, Masters, etc.) plus non-profit board service
	Positive media coverage (%)	number of positive/neutral hits divided by total (all) hits, by media outlet
	Policy wins (%)	Number of policies finalized in SAHA's favor divided by total number of policies engaged

### Long-term Strategic Goals and Short-term (Annual) Objectives

Strategic Goals (Long-term 2020)	Objectives (Short-term FY2017)
1: Empower and equip families to improve their quality of life and achieve economic stability.	Evaluate effectiveness of EEP program
	Analyze other alternatives to small area FMRs that promotes neighborhoods of opportunity
	Increase employment & income for residents engaged in self-sufficiency activity
	Expand and scale up ConnectHome
2: Invest in our greatest resource – our employees– and establish a track record for integrity, accountability, collaboration and strong customer service.	Retain high performing employees
	Revamp performance evaluation process
	Create a comprehensive onboarding process to best prepare an employee to be a productive staff member at SAHA
	Ensure a timely recruiting process
3: Preserve and improve existing affordable housing resources and opportunities	Decrease routine and emergency work order turnaround times
	Sell Section 32 rehab SF homes, vacant lots and rental properties
4: Strategically expand the supply of affordable housing	Construction of new units
	Analyze other alternatives to small area FMRs that promotes neighborhoods of opportunity
5: Transform core operations to be a high performing and financially strong organization.	Maximize Occupancy
	Minimize turnaround
	Reduce payment processing time
	To improve key processes.
	Ensure financially sustainable organization over the long term
	Develop Criminal history policy
6: Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.	Develop Data Management Consent policy
	Build communications function
	Develop PR measurement scorecard
	Market SAHA's expertise to build trust and authority with stakeholders.
	Plan for agency reputation research with stakeholders and the public.



## C. Non-MTW Related Housing Authority Information

### I. 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 246 vouchers for families.

**Continuum of Care (CoC) Program:** 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 CoC.

**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 510 families authorized for assistance under this program.

### II. Section 32 Program / HOPE VI Mirasol - Westside Reinvestment Initiative

In 2016, HUD approved an Addendum to the HOPE VI Mirasol Homeownership Neighborhoods Grant initially developed in the late 1990's. The Plan's most basic elements are:

- 1) The demolition of 67 vacant homes and remnants on 1 lot in the Blueridge and Villas de Fortuna neighborhoods;
- 2) Substantial rehabilitation of 19 vacant homes in the Palm Lake and Sunflower Neighborhoods;
- 3) New construction of 69 single-family homes in Blueridge (40), Villas De Fortuna (28) and Palm Lake (1) neighborhoods; and
- 4) Use of the Middle-Income Homeownership Program (MIHP) a "Nehemiah-like" homeownership program that was in effect at the time that SAHA received the HOPE VI

Mirasol Grant. The MIH Program allows sale of homes to families earning up to 100% of the area median income and 15% of the homes may be sold to families earning up to 115% of the area median income.

Newly constructed homes will range from \$105,000 to \$165,000 and from three bedroom/two bath to five bedroom/three baths. Substantially rehabilitated homes expect to sell for \$80,000 - \$130,000. The 39 boarded up, vacant homes in the Blueridge subdivision were demolished in 2016 and new home construction will start in the summer of 2017. Homes in the Villas de Fortuna subdivision will be demolished in 2017. SAHA contracted with the Westside Development Corporation, a nonprofit of the City of San Antonio, to provide programs and services to residents during the HUD approval and pre-development process.

Local market conditions indicate that these homes will be in demand. Only 10% of builders in San Antonio are building homes less than \$150,000. There is less than a three month inventory of homes available on the market. Working families do not have sufficient choices for home buying and rents remain high. SAHA created Home Buyer Readiness Education Workshops to build a ready pipeline of buyers for these homes. To date, SAHA has graduated over 200 interested home buyers from the Program.

### **III. Section 32 Plan/ HOPE VI Spring View Homes**

SAHA owns eight (8) remaining properties, part of the HOPE VI Spring View project that remain under the Section 32 Program and one (1) is currently under contract for purchase. The properties must be repaired to local code requirements and sold to eligible income, first time home buyers as per the Program guidelines. SAHA staff has submitted a waiver to HUD requesting approval to sell these homes to individuals qualifying for an FHA 203k mortgage or similar lending product. SAHA is reluctant to repair the properties due to high rates of vandalism in the surrounding neighborhood. The 203k lending product allows the buyer to purchase an affordable home, and wrap the mortgage and repairs together as one loan. This allows SAHA to sell the home to an eligible income buyer who will occupy the home immediately during/following repairs.

### **IV. Post Auction/RTC/Former Lease-Purchase Portfolio**

SAHA has reduced its single family homes/lots portfolio to three (3) vacant homes and two (2) lots. These properties remain from previous auction sales or were former Lease-Purchase Program properties. Staff expects to dispose of these in 2017.

### **V. Sale of Excess Assets**

SAHA is considering the sale of excess assets from its property inventory. SAHA is evaluating the benefit of potential sales from the property list upon staff recommendation and SAHA Board of Commissioner approval. Potential homes, lots and large parcels under consideration include those in the SAHA Large Parcel Property inventory and SAHA Non-PIC Scattered Sites Inventory detailed below

### SAHA Large Parcel Property inventory

Vacant Parcels for Development	Council District	Owner	Acreage	Area (sf)	Value *Estimate	Comment
* The estimated value noted in italics is a recent appraisal or the comparable value from a similar tract in the neighborhood.						
550 Brooklyn	1	SAHA	2.58	112,384	\$ 6,400,000.00	2008 appraisal shown; 2016 BCAD Value @ \$6.4M
Sutton 909 Runnels	2	SAHA	1.945	84,724	\$ 250,000.00	Appraisal 11/2/16
Springview 2730 E. Commerce	2	SAHFC	1.3	56,628	\$ 118,919.00	
Springview 2830 E. Commerce	2	SAHFC	2.4	104,544	\$ 219,542.00	
Springview 2944 E. Commerce	2	SAHFC	2.4	104,544	\$ 219,542.00	
Springview 700 Garcia St.	2	SAHA	3.3	143,748	\$ 891,238.00	Vacant Admin Bldg.
Springview Garcia @ R.R. Track	2	SAHA	3	130,680	\$ 143,748.00	Choice Urban Farm
Springview 903-937 Hedges	2	SAHA	1.9	82,764	\$ 173,804.00	
Springview 651 S. Rio Grande	2	SAHA	5	217,800	\$ 457,380.00	
Springview 200 S. Rio Grande	2	SAHA	2.4	104,544	\$ 219,542.00	
1310 S. Brazos	5	SAHFC	5.01	218,255	\$ 2,000,000.00	10.17.13 Appraisal, semi-vacant warehouse
3940 San Fernando	5	SAHA	9.68	421,660	\$ 843,322.00	VCP w/TCEQ environmental
5700 Culebra Rd.	7	SAHDC	12.56	547,113	\$ 1,094,227.00	2008 appraised @\$1.4M
1706 Cincinnati	7	SAHDC	0.54	23,522	\$ 43,250.00	4.4.08 Appraisal - LURA?
TOTAL ESTIMATE					\$ 13,074,514.00	

### SAHA Non-PIC Scattered Sites Inventory

SCATTERED SITES VACANT-LOTS								
PROPERTY ADDRESS	OWNER	COUNCIL DISTRICT	STATUS	ACREAGE	SQ. FT	Property ID #	C A N #	COMMENT
7250 GLEN MIST	SAN ANTONIO HOMEOWNERS HIP OPP CORP		RTC VAC-LOT	0.056	1,069.00	314106	05703-102-0540	AUCTION LOT NO SELL
1011 YUCCA	SAHA	2	SPRINGVIEW VAC-LOT	0.1779	7,750.00	462704	10710-029-0160	AUCTION LOT NO SELL
SCATTERED SITES VACANT-HOUSES (3)								
PROPERTY ADDRESS	OWNER	COUNCIL DISTRICT	STATUS	ACREAGE	SQ. FT	Property ID #	C A N #	COMMENT
6211 BROWNLEAF	SAN ANTONIO HOMEOWNERS HIP OPP CORP	6	VACANT HM	0.1263	5,500.00	577377	15405-001-0270	PROPERTY IS IN REHAB STATUS TO PUT ON MARKET TO SELL
1071 POINSETTIA ST	SAHA	2	VACANT HM	0.1607	7,000.00	441311	09545-004-0040	AUCTION PROP NEED TO CLEAR TITLE
1411 MONTANA	SAHA	2	VACANT HM	0.1522	6,630.00	115411	01437-013-0160	

RENTAL PROPERTIES (3)							
PROPERTY ADDRESS	OWNER	COUNCIL DISTRICT	STATUS	ACREAGE	SQ. FT	PROPERTY ID #	COMMENT
4846 MELVIN	SAN ANTONIO HOUSING FIN CORP	2	OCCUPIED	0.1205	5,250.00	12880-003-0121	Potential Sale to Occupants
9411 STRECH	SAN ANTONIO HOMEOWNERSHIP OPP CORP	4	OCCUPIED	0.1435	6,250.00	11132-033-3313	Potential Sale to Occupants
211 E THEO	SAN ANTONIO HOUSING FIN CORP	3	OCCUPIED	0.1917	8,350.00	03225-011-0120	Renter will vacate by Oct. 2017. SAHA to sell.

SPRINGVIEW-SCATTERED SITES									
OWNER	COUNCIL DISTRICT	STATUS	ACREAGE	SQ. FT	BCAD VALUE	Property ID #	C A N #	STATUS	COMMENT
SAHA	2	VACANT HM		6,500.00		115521	01443-016-0060	Under Contract	SPRINGVIEW HOPE VI
SAHA	2	VACANT HM	0.1435	6,250.00	\$53,950.00	452504	10246-008-0100		SPRINGVIEW HOPE VI
SAHA	2	VACANT HM	0.1435	6,250.00	\$54,450.00	462032	10681-004-0050		SPRINGVIEW HOPE VI
SAHA	2	VACANT HM	0.1475	6,423.00	\$62,830.00	115632	01450-016-0020	Repairing	SPRINGVIEW HOPE VI
SAHA	2	VACANT HM	0.1435	6,250.00	\$46,930.00	452413	10244-005-0070		LINCOLNSHIRE-WILLOW PARK
SAHA	2	VACANT HM	0.1722	7,500.00	\$55,500.00	453698	10295-020-0100		SPRINGVIEW HOPE VI
SAHA	2	VACANT HM	0.1722	7,500.00	\$57,130.00	453718	10296-021-0040		SPRINGVIEW HOPE VI
SAHA	2	VACANT HM	0.1389	6,050.00	\$73,870.00	115673	01450-017-0150		SPRINGVIEW HOPE VI

CHOICE - Infill Development (Strategy 1)										
PROPERTY ADDRESS	OWNER	Target Area	STATUS	ACREAGE	SQ. FT	Date closed	Purchase Price	Property ID	C A N #	COMMENT
<b>Target Area 1</b>										
611 ARTHUR	SAHA	1	Vacant Lot	0.1826	7956	5/9/2015	\$9,000	113946		
1533 HAYS	SAHA	1	Vacant Lot	10998	4346	01/16/2015	\$8,000			
1535 HAYS	SAHA	1	Vacant Home	0.1046	994	01/16/2015	\$18,000			
1439 LAMAR	SAHA	1	Vacant Lot	0.0998	4346	5/8/2015	\$10,000	113770	01313-017-0100	
209 Gabriel	SAHA	1	Vacant Lot	0.112	4879.00	10/17/2016	\$1,638.50	113754	01313-014-0030	(purchased from CoSA)
519 Arthur	SAHA	1	Vacant Lot	0.1708	7440.00	10/17/2016	\$1,475	113919	01324-023-0060	(purchased from CoSA)
<b>Target Area 2</b>										
1714 BURNET	SA Housing Finance Corp	2	Vacant Home	0.1224	5332	SAHA Owned		114316	01358-003-0040	House - needs demo

## VI. Sale of Tampico Site

The Tampico Warehouse is located at 200 Tampico Street and is included in the HUD AMP which includes the Alazan/Apache courts public housing development. The site area is 3.763 acres or 163,916 square feet. However, a portion of the property is located in the 100 year flood plain, so the usable area is 3.624 acres or 157,853 square feet. The site is improved with a 9,600 square foot office/warehouse. However, the building has been severely vandalized and was given no value in the appraisal report dated June 6, 2012 which valued the site at \$1,025,000.

SAHA has met with a potential development partner to consider the construction of a tax credit mixed finance affordable development.

## VII. Public Housing Scattered Sites

SAHA currently operates 163 single family housing units throughout the city of San Antonio. SAHA evaluated the scattered sites portfolio due to the high cost of managing and maintaining these units. An application for the disposition of 94 scattered sites was submitted to HUD in January 2017. The application is currently under review. If the disposition request is approved by HUD, net sale proceeds will be invested in capital repair/replacement projects of other public housing assets.

## VIII. Former Springview Administration Building and adjacent land parcels

The subject assemblage consists of three distinct sections; together they equal the total area of the subject property, approximately 8.72 acres or 379,847 square feet of land. Property 1 is located on the northern boundary of the larger parent tract along East Commerce Street and

consists of approximately 2.2967 acres or 100,044 square feet of vacant land. Abutting Property 1 to the south, Property 2 contains 4.1110 acres or 179,075 square feet of vacant land. The western boundary of Property 2 follows the Garcia Street right-of-way south, except where Property 3 fronts Garcia Street, and terminates approximately 270 feet south of the Rosary Street and Garcia Street intersection. The eastern boundary of Property 2 is the Onslow Drive right-of-way, which is unimproved as of the effective date of this appraisal. Property 3 is a 2.3124 acre or 100,728 square feet tract of land improved with a freestanding office building of 9,309 square feet, bounded to the west by Garcia Street and by Property 1 to the north and Property 2 to the south.

#### **IX. The Monastery of Our Lady of Charity property and surrounding land**

Preliminary discussions have taken place with a tax credit development firm concerning potential redevelopment of the historic convent property, two multifamily buildings, an abandoned former school building and 2.4 acres of vacant land. The property is located at 210 S Grimes and is bordered by Montana, Rio Grande, and the Springview Senior Public Housing Development.

#### **X. 440 Labor Street**

The property contains a 12,100 sf single story building located on 1.3 acres of land. The property is currently occupied by a day care facility.

#### **XI. Choice Planning and Action Grant Application**

SAHA is interested in submitting an application for a Choice Planning Grant during the next round of applications.

## Section II. General Housing Authority Operating Information

### A. Housing Stock Information

#### Public housing units

At the beginning of FY2017, the agency had a total of 6,026 units in inventory. In the first half of FY2017, seventy-one (71) units were added as a result of new construction at East Meadows Phase I. With this change, the Agency projects a total of 6,097 units in the Low Income Public Housing Program (LIPH, also referred to as public housing) at the beginning of FY2018.

#### Projected change in public housing units during the plan year

By the end of FY2018, the Agency anticipates adding 40 public housing units as part of phase two of the mixed-finance redevelopment project, Wheatley Park Senior Living, formerly part of Wheatley Courts public housing development. These units are expected to be fully occupied by March 2018.

(50900 Table)

Planned New Public Housing Units to be Added During the Fiscal Year											
AMP Name and Number	Bedroom Size							Total Units	Population Type *	# of UFAS Units	
	0	1	2	3	4	5	6+			Fully Accessible	Adaptable
TX006000059 Wheatley Park Senior Living	0	40	0	0	0	0	0	40	Elderly	TBD	TBD
<b>Total Public Housing Units to be Added</b>									<b>40</b>		
* <b>Select Population Type from:</b> Elderly, Disabled, General, Elderly/Disabled, Other											
If Other, please describe: <b>NA</b>											

Pending HUD approval, the Agency plans to remove 94 single-family scattered sites from the public housing inventory. The Agency completed an evaluation of all 163 scattered sites in the portfolio and ninety-four units were selected for disposition due to the high cost of managing and maintaining these units. If HUD approves the disposition application, the net sale proceeds will be invested in capital repair/replacement projects for other public housing assets. The total projected number of public housing units at the end of FY2018 is anticipated to be 6,043.

The Agency is also looking into the possibility of bringing online additional ACC units (PH) that are authorized and have not been assigned. It is the Agency's understanding that if and when these ACC units are assigned to a property owned or being developed by SAHA, the Agency's PH unit inventory would increase.

(50900 Table)

Planned Public Housing Units to be Removed During the Fiscal Year		
PIC Dev. # / AMP and PIC Dev. Name	Number of Units to be Removed	Explanation for Removal
TX006000033 Scattered Sites	94	SAHA submitted application for disposition of 94 single-family homes in the public housing scattered site portfolio
<b>Total Number of Units to be Removed</b>	<b>94</b>	

**MTW Housing Choice Vouchers**

The Agency projects a total of 12,040 authorized MTW vouchers by the end of FY2017. If HUD approves the disposition of 94 public housing scattered sites noted above, the Agency will apply for tenant protection vouchers. These additional vouchers will increase the anticipated authorized MTW vouchers to 12,134 for FY2018.

**Project-based Vouchers (PBV)**

As detailed in the tables below, SAHA anticipates project-basing 36 additional housing choice vouchers in FY2018 as part of phase two of the onsite redevelopment of Wheatley Courts public housing, now named Wheatley Park Senior Living. The total number of vouchers that are anticipated to be project-based in FY2018 is 75.

- Thirty-one (31) PBV remain at Gardens at San Juan.
- Eight (8) PBV remain at East Meadows Phase I
- Thirty-six (36) PBV at Wheatley Senior Park Living

If opportunities to project-base housing choice vouchers at additional properties do arise during FY2018, SAHA will report on any actions taken in a subsequent MTW Report. No other housing stock changes are anticipated during the 2017-18 fiscal year.



(50900 Table)

<b>New Housing Choice Vouchers to be Project-Based During the Fiscal Year</b>			
<b>Property Name</b>	<b>Anticipated Number of New Vouchers to be Project-Based *</b>	<b>Description of Project</b>	
Wheatley Park Senior Living	36	Wheatley Park Senior Living is a mixed finance project that will include a 3 story, 80 unit apartment complex with affordable units for seniors.	
<b>Anticipated Total New Vouchers to be Project-Based</b>	<b>36</b>	Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year	<b>75</b>
		Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year	<b>75</b>

\*New refers to tenant-based vouchers that are being project-based for the first time. The count should only include agreements in which a HAP agreement will be in place by the end of the year.

### Other Changes to the Housing Stock

(50900 Table)

<b>Other Changes to the Housing Stock Anticipated During the Fiscal Year</b>
SAHA intends to rehabilitate Victoria Plaza and will therefore move all residents to other public housing units beginning in April 2017. It will take approximately 6 months to move them, and during that time there will be very few elderly/disabled applicants pulled from the waitlist. These units are expected to remain offline until FY2019.

Examples of the types of other changes can include but are not limited to units that are held off-line due to the relocation of residents, units that are off-line due to substantial rehabilitation and potential plans for acquiring units.

### Updates on Redevelopment Projects

#### Wheatley Choice Neighborhood Initiative

The San Antonio Housing Authority was awarded a \$29.7 million Choice Neighborhood Implementation grant on December 13, 2012 for the revitalization of Wheatley Courts and the surrounding neighborhood. The Wheatley Courts, a 246-unit obsolete, inefficient, inaccessible,

and unsafe public housing site was demolished in February 2014 to make way for a 412-unit, high quality, mixed-income community. The revitalization plan will result in one-for-one replacement of the public housing units and will ensure long-term affordability in a diverse, mixed-income community.

The first on-site phase (East Meadows I), which was awarded a 9% Low Income Housing Tax Credits on July 30, 2014 and closed on construction financing July 2016, includes 215 mixed income family units on three and one half blocks consisting of one, two, three and four bedroom garden apartments, and two, three and four bedroom townhouse apartments with related exterior site amenities. This phase also includes a BiblioTech, a digital library, for the residents and community to use. This phase is currently 85% construction complete and expected to be fully leased and occupied by September 2017.

The second on-site phase, (Wheatley Park Senior Living), which also received a 9% Low Income Housing Tax Credit on September 14, 2015 will include a 3 story, 80 unit apartment complex with affordable units for seniors 62 years of age or older, with incomes that are 30% to 60% of AMI. The project closed on construction financing September 30, 2016. The construction of this phase is scheduled to be completed in December 2017 and fully occupied by June 2018.

The third on-site phase, (East Meadows II) for which 2017 9% Low Income Housing Tax Credits are being sought, will include 117 multi-family units consisting of one, two, three and four bedroom garden apartments, and two and three bedroom townhouse apartments with related exterior site amenities. If an allocation of tax credits is received in July 2017, then the closing for construction financing will occur by March 2018.

The types of units provided by this project include:

- East Meadows Phase I (Wheatley Courts CNI Phase II) 215 units:
  - Market rate: 59
  - Tax Credit only 60% or below: 7
  - Tax Credit PBV: 8
  - Tax Credit HOME: 6
  - Tax Credit PHU: 71
- Wheatley Park Senior Living (Wheatley Courts CNI Phase III) 80 units:
  - Market rate: 0
  - Tax Credit only 60% or below: 4
  - Tax Credit PBV: 24
  - Tax Credit PBV/HOME: 12
  - Tax Credit PHU: 40
- East Meadows Phase II (Wheatley Courts CNI Phase IV) 119 units:
  - Market Rate: 24
  - Tax Credit only 60% or below: 53
  - Tax Credit PBV: 0
  - Tax Credit PHU: 42

The total number units at the property, by Phase, are:

- The Park at Sutton Oaks = 208 Units (Wheatley Courts CNI Phase I)
- East Meadows Phase I = 215 Units (Wheatley Courts CNI Phase II)
- Wheatley Park Senior Living = 80 Units (Wheatley Courts CNI Phase III)
- East Meadows Phase II = 119 (Wheatley Courts CNI Phase IV)

East Meadows is located in San Antonio's eastside neighborhood. There are several revitalization efforts underway in this area. Collectively, these initiatives are coordinated by the EastPoint Coordinating Council, chaired by Mayor Ivy Taylor. EastPoint encompasses four program areas: 1) the Wheatley Courts Choice Neighborhood, 2) the EastPoint Promise Zone, 3) the Byrne Criminal Justice Grant and 4) the Eastside Promise Neighborhood.

EastPoint is the only area in the United States to receive awards for three separate Federal programs under the White House Neighborhood Revitalization Initiative (NRI): it is a HUD Choice Implementation Neighborhood, a Department of Education Promise Neighborhood, and a Department of Justice Byrne grantee. EastPoint also received a Promise Zone designation. The Choice Neighborhoods Initiative is a central part of the NRI, an interagency partnership between HUD and the Departments of Education, Health and Human Services, Justice, and Treasury to support locally driven solutions for transforming distressed neighborhoods. The NRI acknowledges the interconnectedness of many factors in revitalization, including housing, education, adequate infrastructure, economic development, and safety, and promotes breaking the Federal government "red tape" to coordinate revitalization efforts locally. The CNI funds received are one of the initial investments in the area and an early step toward revitalization.

By coupling the many NRI initiatives with local support, the City of San Antonio is orchestrating a collaborative effort aimed at de-concentrating poverty and improving opportunities for individuals living in EastPoint.

Supportive services being offered include:

- Intensive Case Management
- Employment & Skills Training
- Adult Education
- Children and Youth Programs
- Health Services
- Safety Program
- Re-entry services for residents on probation

The Critical Communities Improvement Plan under the "Neighborhood" component consists of the following six strategies:

- Infill housing
- Owner Occupied Rehab
- Facade Improvement
- Urban Farm
- Veterans Outreach and Transition Center

- Neighborhood Beautification

### **Victoria Commons Chavez Multifamily**

Victoria Commons is the redevelopment of the former 660-unit Victoria Courts Public Housing Development. Previous completed phases include the 210-unit mixed-income multifamily Refugio Apartments; the 245-unit mixed-income multifamily HemisView Village Apartments, the 120-unit for sale Artisan Park Townhomes (22 units completed, 98 townhome lots planned for sale as market rate), and the planned 26 single family lots on Leigh Street were sold. There were five affordable lots sold, 17 sold as market rate, and 4 more under contract for market rate homes.

The fourth phase currently known as Victoria Commons Chavez Multifamily will be a 215-unit mixed-income mixed-use multifamily development on the SAHA owned 2 ½ acres and 1 acre transaction at Labor Street and Chavez Blvd. If SAHA's developer pursues a 4% tax credit/bond deal construction could start by January 2018, but if 9% tax credit financing is more financially beneficial to SAHA then construction is estimated to begin by October 2018. The project is being reassessed due to the decline in tax credit pricing stemming from proposed tax reform as well as recent changes in the state's Qualified Allocation Plan.

The Victoria Commons Chavez Multifamily project will include:

- 133 market units
- 43 units at or below 60% AMI
- 28 public housing units
- 11 PBV units

The total number units at the property will be 215.

Victoria Commons Chavez Multifamily will be the fourth phase of redevelopment of the former Victoria Courts that had 660 Public Housing units. It is located in the highly desirable Lavaca Neighborhood where the real estate market has been identified as one of the hottest in the country in previous national articles. The site is part of a primarily single family residential neighborhood close to many amenities and downtown.

The fourth phase project will include a full time property management staff and offer supportive services for affordable residents that include after school activities, weekly exercise classes, twice a month on-site social events (i.e. potluck dinners, game night, movie nights, birthday parties, etc.), annual income tax preparation, monthly food pantry/ common household items, annual health fairs, quarterly health and nutrition courses.

### **General Description of All Planned Capital Expenditures During the Plan Year**

During the plan year (7/1/17 to 6/30/18), SAHA Plans to invest approximately \$27,695,136 of MTW funds and reserves in capital repairs, replacements and/or architectural services on public housing properties. These investments will extend the useful life expectancy and preservation of the agency's public housing inventory. The following planned projects are in various stages of scope development and implementation.

(50900 Table)

**General Description of All Planned Capital Fund Expenditures During the Plan Year**

Narrative general description of all planned capital fund expenditures during the Plan year (by development)		
Charles Andrews (1)	Substantial Renovation (Includes Hail Damage Roof Repairs/Replacement)	\$2,478,068
H.B Gonzalez (1)	Structural/Ext-Int Repairs	\$ 963,950
Westway Apartments (1)	Drainage/Sewer Repairs	\$2,749,975
Guadalupe Subd: 24 Gus Garcia (1)	Burn Unit - Reconstruction	\$ 164,333
Victoria Plaza (2)	Comprehensive Modernization	\$11,307,000
Cross Creek Apartments (2)	Hail Damage Roof Repairs/Replacement	\$ 59,126
Escondida Apartments (2)	Hail Damage Roof Repairs/Replacement	\$ 67,614
Francis Furey Apartments (2)	Hail Damage Roof Repairs/Replacement	\$ 472,531
Sahara Ramsey (2)	Hail Damage Roof Repairs/Replacement	\$ 82,687
Tarry Towne Apartments (2)	Hail Damage Roof Repairs/Replacement	\$ 585,072
Williamsburg Apartments (2)	Hail Damage Roof Repairs/Replacement	\$ 51,825
Pin Oak II (2)	Hail Damage Roof Repairs/Replacement	\$ 105,539
Morris Beldon (2)	Hail Damage Roof Repairs/Replacement	\$ 182,291
L.C. Rutledge (2)	Hail Damage Roof Repairs/Replacement	\$ 103,142
Lincoln Heights (2)	Hail Damage Roof Repairs/Replacement	\$1,489,405
Madonna Apartments (2)	Hail Damage Roof Repairs/Replacement	\$ 285,578
Scattered Site: 9354 Valley Gate (2)	Water Damage Unit	\$ 100,000
Blanco Apartments	Basement-Structural Repairs	\$ 282,500
W.C. White Apartments	Basement-Structural Repairs	\$ 282,500
Villa Tranchese Apartments (2)	Fire Sprinkler System Design, Chiller System Replacement, Basement Structural Repairs, Fire Sprinkler System Upgrades	\$3,478,000
Fair Avenue Apartments	Fire Sprinkler System Design, Basement Structural Repairs, Fire Sprinkler System Upgrades	\$3,404,000

- (1) Capital project is currently in progress. Partial expenditure may carry over to FY18.  
(2) Capital projects will include various funding sources: CFP Funds combined with MTW Funds, EPC, and/or Insurance Proceeds.

## B. Leasing Information

As detailed in the tables below, SAHA plans to serve **18,184 MTW households** in fiscal year 2017-18, through both public housing and MTW Housing Choice Vouchers.

(50900 Table)

Planned Number of Households Served at the End of the Fiscal Year		
MTW Households to be Served Through:	Planned Number of Households to be Served*	Planned Number of Unit Months Occupied/Leased***
Federal MTW Public Housing Units to be Leased	6,043	72,516
Federal MTW Voucher (HCV) Units to be Utilized	12,134	145,608
Number of Units to be Occupied/Leased through Local, Non-Traditional, MTW Funded, Property-Based Assistance Programs **	n/a	n/a
Number of Units to be Occupied/Leased through Local, Non-Traditional, MTW Funded, Tenant-Based Assistance Programs **	n/a	n/a
<b>Total Households Projected to be Served</b>	<b>18,177</b>	<b>218,124</b>

\* Calculated by dividing the planned number of unit months occupied/leased by 12.

\*\* In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households to be served, the PHA should estimate the number of households to be served.

\*\*\*Unit Months Occupied/Leased is the total number of months the PHA has leased/occupied units, according to unit category during the fiscal year.

(50900 Tables)

<b>Reporting Compliance with Statutory MTW Requirements</b>
<p>If the PHA has been out of compliance with any of the required statutory MTW requirements listed in Section II(C) of the Standard MTW Agreement, the PHA will provide a narrative discussion and a plan as to how it will return to compliance. If the PHA is currently in compliance, no discussion or reporting is necessary.</p>
<p>SAHA has not been out of compliance with any of the required statutory MTW requirements.</p>

<b>Description of any Anticipated Issues Related to Leasing of Public Housing, Housing Choice Vouchers and/or Local, Non-Traditional Units and Possible Solutions</b>	
<b>Housing Program</b>	<b>Description of Anticipated Leasing Issues and Possible Solutions</b>
<p>Federal MTW Public Housing Units</p>	<p>SAHA intends to rehabilitate Victoria Plaza and will therefore move all residents to other PH units beginning in April 2017. It will take approximately 6 months to move them, and during that time there will be very few elderly/disabled applicants pulled from the waitlist.</p>

### C. Waiting List Information

As detailed in the table below, SAHA expects to have 5 wait lists open during the plan year.

(50900 Table)

Wait List Information Projected for the Beginning of the Fiscal Year				
Housing Program(s) *	Wait List Type**	Number of Households on Wait List	Wait List Open, Partially Open or Closed***	Are There Plans to Open the Wait List During the Fiscal Year
Federal MTW Public Housing Units	Site-based	24,499	Open	No
Federal MTW Housing Choice Voucher Program	Community-wide	28,257	Open	No
Federal Non-MTW Housing Choice Voucher Program: Moderate Rehabilitation	Moderate Rehabilitation	20,585	Open	No
Project-based Local (Gardens at San Juan Square)	Local Project Based	18,885	Open	No
Project-based Local (East Meadows Phase I)	Local Project Based	2,076	Open	No
Project-based Local (Wheatley Park Senior Living)	Local Project Based	n/a	Closed	Yes

\* *Select Housing Program:* Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

\*\* *Select Wait List Types:* Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).

\*\*\* For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open.



n/a

If Local, Non-Traditional Housing Program, please describe:

Wait lists associated with FY2015-3: Modified Project Based Vouchers  
Project-based Local (Gardens at San Juan Square) - 31 PBV units at new LIHTC property open to general population  
Project-based Local (East Meadows Phase I) - 8 PBV units at new LIHTC property open to general population  
Project-based Local (Wheatley Park Senior Living) - 36 PBV units at planned new LIHTC property open to elderly population

If Other Wait List Type, please describe:

n/a

If there are any changes to the organizational structure of the wait list or policy changes regarding the wait list, provide a narrative detailing these changes.

With the new construction of Wheatley Park Senior Living, the Agency plans to open a new wait list for project-based vouchers. There are no other changes to HCV waiting list anticipated for FY2018. The public housing wait list will undergo updates to include limiting the number of preferred developments an applicant can select to no more than 5. Currently, applicants have no limit.

### **Section III. Proposed MTW Activities**

No New MTW Activities are proposed for FY2018.

## **Section IV. Approved MTW Activities**

### **A. Implemented Activities**

#### **1. FY2011-1e: Preservation and Expansion of Affordable Housing**

This activity is designed to increase housing choices, and was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year.

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 has not utilized it for the construction of new units; all past development reported under this activity in past 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.

SAHA began utilizing this ability to fund local, non-traditional units 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 approved RHF Plan that was approved by HUD in FY2014.

This activity is designed to increase housing choices. It operationalizes the 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; which requires the Agency to construct new affordable units (defined as units reserved for households with income at or below 80% AMI).

While SAHA may develop new communities with market-rate units in addition to affordable units; this activity does not authorize the use of MTW funds (including RHF funds) for the development of those market-rate units.

It is also important to note that SAHA's flexibility to construct new Section 8 or 9 units is authorized under MTW single-fund flexibility and those outcomes are reported in the sources and uses section of this report (Section V). The only units authorized under this activity FY2011-1e are units reserved for households with income at or below 80% AMI that receive no Section 8 or 9 funding.

This activity was revised for FY2016. Language describing Preservation and Expansion Policy context, background, and process was moved to Appendix 3. While the Preservation and Expansion Policy language can provide a helpful backdrop to the goals of FY2011-1e, it can also distract from the specific use of MTW flexibility. The language in FY2011-1e is now focused on the use of MTW funds to preserve or expand affordable housing units without any Section 8 or Section 9 subsidy. Since no preservation of non-Section 8/9 units is planned for FY2016, the metric "HC #2: Units of Housing Preserved" has been set to a benchmark of 0 (zero).

### I. FY2017 Update

This activity did not experience any significant changes in the Plan year. SAHA is on schedule to add 77 affordable, non-Section 8/9 units at East Meadows Phase I. This property is already leasing and expected to be 100% occupied by June 2017.

### II. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics or baselines. FY2018 benchmarks have been updated to reflect latest Wheatley / East Meadows construction schedule. Specifically, the five-year benchmark is updated from 610 units to 352 units. The current plan year benchmark has been set to 4 units. During FY2018, SAHA will be setting new five-year targets for this activity.

### III. HUD Standard Metrics

<b>HC #1: Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of new non-Section 8 or 9 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.	0	352 units over 5 years Year 1, 113 at Park at Sutton Oaks Year 2, 158 at Gardens at San Juan Year 3, no units Year 4, 77 at East Meadows I Year 5, 4 at Wheatley Park Senior Living
Year 5: Wheatley Senior Living (Wheatley CNI Phase 3)	0	4

<b>HC #2: Units of Housing Preserved</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of non-Section 8 or 9 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.	0	0

## **2. FY2011-9: Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services**

This activity is designed to increase housing choices, and was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year.

SAHA allocates set-aside of tenant-based vouchers for households referred by non-profit sponsors who commit to provide supportive services. The set-aside would be for households with specific priority needs, such as those who are homeless. Current partners are The Center for Health Care Services (CHCS) and San Antonio Metropolitan Ministries (SAMM).

CHCS and SAMM 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 CHCS and SAMMs, the household is referred by CHCS/SAMMs 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 CHCS and SAMM provide intensive case management for one year to every household participating in the program. CHCS and SAMM provide reports to SAHA on a quarterly basis.

The set-aside program was implemented in December 2011. Since implementation SAHA has leased up 195 participants of which 31 have terminated the program.

### **I. FY2017 Update**

This activity did not experience any significant changes in the Plan year. FY2018 benchmarks are the same as for FY2017.

### **II. FY2018 Expectations**

The agency continues to not meet benchmarks for percentage of households served that continue to be housed after 2 years. The current agreement with service providers only requires one year of case management for these households. The agency is currently exploring what impact this might be having on households successfully maintaining housing for at least two years.

SAHA does not anticipate any significant changes to this activity in the Plan year; however, because the agency is trying to understand why households continue to not maintain housing for 2 years, one new metric will be added in FY2018 that tracks percentage of households served that continue to be housed after 1 year.

### **III. HUD Standard Metrics**

<i>HC #7: Households Assisted by Services that Increase Housing Choice (HCV)</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

Number of households receiving services aimed to increase housing choice (increase).	0	200 households utilizing committed vouchers
--	---	---

#### IV. SAHA Metrics

<i>Maintain Households Served</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Percentage of households served that continue to be housed after 2 years	0	90% of households successfully housed after 2 years
Percentage of households served that continue to be housed after 1 years	0	90% of households successfully housed after 1 year

### **3. FY2013-2: Simplified Earned Income Disregard (EID) (Public Housing)**

This activity is designed to promote self-sufficiency, and increase cost effectiveness, and was originally approved as part of the FY2012-2013 MTW Plan.

This activity expands the number of months for which EID (*referred to as earned-income disregard or earned-income disallowance*) 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:

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

Head, spouse, or co-head of household qualifies 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. Staff has access to the appointment log, and sign in sheets for financial counseling, and a very good relationship with counseling partners to obtain information on attendance.

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.

The Agency was able to successfully complete all necessary software changes during FY2016. Any new households receiving the S-EID will be tracked in the new programmed system. The current S-EID households will be manually entered into the new programmed system over a 6 month period. This will eliminate errors associated with manual tracking. As a direct result of this software change, the Agency is positioned to be able to better understand how the S-EID is impacting household income stability and respond when residents experience loss of income and employment.

Starting in FY2017, a new Jobs-Plus program will be underway at Cassiano Homes. Cassiano residents will not be eligible for the Simplified EID described in this activity, they will utilize the HUD authorized Jobs-Plus Earned Income Disregard (JP-EID).

## I. FY2017 Update

Starting in FY2017, a new Jobs-Plus program began at Cassiano Homes. Cassiano residents are not eligible for the Simplified EID described in this activity, they will utilize the HUD authorized Jobs-Plus Earned Income Disregard (JP-EID). Benchmarks for FY17 were updated: SS #3 now reflects higher expectations for FY17 based on FY16 performance, while CE #1 and CE #2 now reflect anticipated no-change in cost- or time-savings. Also, SS #5 was added as a standard metric (previously this had been tracked as a SAHA metric).

## II. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. FY2018 benchmarks have been updated.

## III. HUD Standard Metrics

<b>SS #5: Households Assisted by Services that Increase Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households receiving services aimed to increase self-sufficiency (increase).	5	200

<b>SS #1: Increase in Household Income (PH)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average earned income of households affected by this policy in dollars (increase). (Amount of Income disregarded (average per year))	\$11,000	\$12,100

<b>SS #3: Increase in Positive Outcomes in Employment Status</b>		
<i>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.</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
<b>(6) Other</b> (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).
	0	80
<b>(6) Other</b> (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	Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned



	implementation of activity (percent). This number may be zero.	income) after implementation of the activity (percent).
	0	100%

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	0	0

<b>SS #8: Households Transitioned to Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	0	0 (will not see transitions until year 5 of implementation)

<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$4884 (200 hours * \$24.42)	375 hours * \$24.42

<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).

	80 households * 2.5 hours = 200 hours	200 households * 2.5 hours = 375 hours
--	---------------------------------------	--

<b><i>CE #3: Decrease in Error Rate of Task Execution</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	13.22%	10.62%

<b><i>CE #5: Increase in Agency Rental Revenue</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$130,284	\$130,284

#### **IV. SAHA Metrics**

<b><i>Number of Household Members who take advantage of disregard (average) (PH)</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of Household Members who take advantage of disregard (average)	1	1.5

**4. FY2013-4: HQS Inspection of SAHA-owned non-profits by SAHA inspectors**

This activity is designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY2012-2013 MTW Plan. Implementation began on January 1, 2013.

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 or owned by a SAHA affiliate under the Agency’s partnerships portfolio. At the time of implementation, SAHA’s inspections department was equipped to absorb the additional inspections without the need to add additional full-time or part-time equivalent positions.

SAHA estimated that the impact to the agency would be a cost savings of \$55.46 per inspection. This figure was the projected result of replacing 3<sup>rd</sup>-party contractors with in-house inspectors. At the time of adoption of this activity, the cost of contracting with a 3<sup>rd</sup>-party to conduct 2,391 inspections annually was \$182,478 per fiscal year. That translated into a cost per inspection of \$76.32. The cost per inspection using SAHA staff was estimated at \$20.86. The net savings per inspection was projected to be \$55.46.

As required by HUD, “CE #2: Staff Time Savings” has been added to this activity. While SAHA recognizes HUD’s efforts to standardize metrics across MTW agencies, this metric is not in alignment with the nature of this activity. Agency cost savings in this activity is not the result of staff time savings, but instead of increased efficiency.

In FY 2016, the benchmark was adjusted to reflect the latest SAHA staff cost estimate of \$35.06 per inspection. The baseline was also adjusted to \$42.90, in order to ensure an accurate apples-to-apples analysis. Both figures now exclude benefits in calculating cost.

**I. FY2017 Update**

This activity did not experience any significant changes during this Plan year. FY2017 benchmarks are the same as for FY2016.

**II. FY2018 Expectations**

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. FY2018 benchmarks are the same as for FY2017.

**III. HUD Standard Metrics**

<b><i>CE #1: Agency Cost Savings</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$42.90 per inspection	\$35.06 per inspection

***CE #2: Staff Time Savings***

Unit of Measurement	Baseline	Benchmark
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).
	0 hours	.5 hours per inspection

**5: FY2014-2: Early Engagement**

This activity is designed to increase housing choices by providing training to support successful participation in SAHA’s assisted housing programs, and was originally approved as part of the FY2013-2014 MTW Plan and implemented in that fiscal year.

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.

After an on-hold period of several months during FY2015, this activity resumed in FY2016. The pause in the activity was due to prioritizing lease-up over other considerations.

**I. FY2017 Update**

This activity did not experience any significant changes during this Plan year. FY2017 benchmarks have been adjusted for two SAHA metrics related to Negative Program Exits.

**II. FY2018 Expectations**

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. FY2018 benchmarks are the same as for FY2017.

**III. HUD Standard Metrics**

<i>HC #7: Households Assisted by Services that Increase Housing Choice</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
Number of households participating in early engagement (increase).	(PH + HCV)	(PH + HCV)
	0	700

**IV. SAHA Metrics**

<i>Negative Program Exits (All HCV Households)</i>
--

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households exiting the housing program for a negative reason	44	40

<b><i>Negative Program Exits (All PH Households)</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households exiting the housing program for a negative reason	41	37

<b><i>Negative Program Exits (EEP only Households HCV)</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households exiting the housing program for a negative reason	44	Values forthcoming in FY2017 report after data entry is completed

<b><i>Negative Program Exits (EEP only Households PH)</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households exiting the housing program for a negative reason	41	Values forthcoming in FY2017 report after data entry is completed

**6. FY2014-3: Faster Implementation of Payment Standard Decreases (HCV)**

This activity is designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY2013-2014 MTW Plan.

Typically, 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), or as predicated on business need. 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.

**I. FY2017 Update**

This activity did not experience any significant changes during this Plan year.

**II. FY2018 Expectations**

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. FY2018 benchmarks are the same as for FY2017.

**III. HUD Standard Metrics**

<b>CE #1: Agency Cost Savings (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total cost of task in dollars (decrease).	12,621 Annual Average Households Served (FY2014) multiplied by \$551.68	12,129 Annual Average Households Served (FY2014) multiplied by \$537.96
	\$6,962,753.28	\$6,524,916.80

## 7. FY2014-4: Biennial Reexaminations (HCV & PH)

This activity is designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY2013-2014 MTW Plan. Activity was implemented January 2014 for the May 2014 reexaminations.

This activity establishes a biennial (instead of an annual) schedule for reexaminations, applicable to all non-elderly/non-disabled HCV participant households (approximately 8,500 households). This activity disregards 100% of additional household income for two years therefore SAHA will no longer disregard participant's income using the traditional Earned Income Disregard calculation.

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. All HCV participants, excluding Elderly/Disabled participants on a fixed income, must complete annual reexaminations of their family income and composition. SAHA proposes to conduct biennial reexaminations for all non-elderly/non-disabled HCV participant households (approximately 8,500 households).

Starting in FY2016, SAHA extended the expiration date on HUD Form-9886 from 15 months to 39 months. SAHA may revise other HUD forms deemed necessary to accommodate biennial or triennial reexaminations. Benchmarks for Cost Savings metrics (both HCV and PH) were updated to reflect anticipated changes in average staff salaries.

### I. FY2017 Update

This activity did not experience any significant changes during this Plan year. Baseline and benchmark values have been provided this year for metrics that in previous plans were listed as "Values forthcoming".

### II. FY2018 Expectations

SAHA anticipates updating review procedures related to the Community Service Monitoring Requirements to match the established regular re-exam schedule. SAHA will still follow regular enforcement requirements as outlined in 24 CFR § 960.605. No other changes are anticipated for this activity in the Plan year. FY2018 benchmarks are the same as for FY2017; however, SAHA expects to update the average salary and benefits figures at time of reporting.

### III. HUD Standard Metrics

<i>CE #1: Agency Cost Savings (HCV)</i>		
Unit of Measurement	Baseline	Benchmark



Total cost of task in dollars.	Baseline average HAS hourly rate multiplied by 8,500 reexams	Next year's average HAS hourly rate multiplied by 4,250 reexams
	\$128,350 per year	\$97,580
<b>CE #2: Staff Time Savings (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total time to complete the task in staff hours.	# of potential biennials multiplied by 1 (# of hours to complete)	# of biennials multiplied by 1 (# of hours to complete)
	8,500 hours per year	4,250 hours per year

<b>CE #5: Increase in Agency Rental Revenue(HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$2,243,429	\$2,243,429

<b>SS #1: Increase in Household Income (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$6,735	\$12,140

<b>SS #3: Increase in Positive Outcomes in Employment Status (HCV)</b>		
<i>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.</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
(6) Other (Heads with any Earned Income)	Heads of 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).
	4,250 * .51 = 2,168	4,250 * .51 = 2,168
(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	Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned

	implementation of activity (percent). This number may be zero.	income) after implementation of the activity (percent).
	51%	51%

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	84	84

<b>SS #8: Households Transitioned to Self Sufficiency (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 full contract rent (no subsidy) 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 full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).
	0	10

<b>CE #1: Agency Cost Savings (PH)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Cost reduction on reexamination process	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).
	$9,402 * .75 * \$21.34 = \$150,479.01 +$ $9,402 * .25 * \$30.16 = \$70,891.08$ <b>\$221,370.09</b>	$4,701 * .75 * \$22.83 = \$150,479.01 +$ $4,701 * .25 * \$36.97 = \$70,891.08$ <b>\$123,942</b>

<b>CE #2: Staff Time Savings (PH)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Staff time spent on reexaminations	# Annual Reexams (4,701) * Reexam processing time (2 hours)	9,402/2 * 2 hours
	9,402 hours	4,701 hours

<b>CE #5: Increase in Agency Rental Revenue (PH)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$10,029,168	\$10,029,168

<b>SS #1: Increase in Household Income (PH)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$3,001.39	\$3,001.39

<b>SS #3: Increase in Positive Outcomes in Employment Status (PH)</b>		
<i>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.</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
(6) Other (Heads with any Earned Income)	Heads of 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).
	0	1,175
(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).
	0	22.32%

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) (PH)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>

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).
	75	75

<b>SS #8: Households Transitioned to Self Sufficiency (PH)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	0	0

## **8. FY2014-5: Triennial Reexamination (HCV)**

This activity is designed to meet the statutory objective of increasing cost effectiveness, and was originally approved as part of the FY2013-2014 MTW Plan.

Prior to this activity, HCV Elderly/Disabled households on a 100% fixed income completed biennial reexamination of their household 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. This activity allows SAHA to conduct triennial reexaminations for elderly/disabled HCV participant households, defined as families in which any member of the family is elderly or disabled and on a 100% fixed income.

This activity was implemented in January 2014 for households with a reexamination date in May 2014. Every household will have the option of interim reexaminations at any time if there is a change in household composition, reduction in income or an increase in medical expenses.

### **I. FY2014 Update**

There were 657 triennial reexaminations completed during year 1 of the three-year rolling implementation.

### **II. FY2015 Update**

There were 3,296 triennial reexaminations completed during year 2 of the three-year rolling implementation.

### **III. FY2016 Update**

There were 3,087 triennial reexaminations completed during the final year of the three-year rolling implementation. The Agency is estimating the cost prior to the implementation of triennials for 12,000 households was \$253,320. Based on FY2016 outcomes, the Agency estimates the current cost after full implementation is \$65,167; resulting in an estimated cost savings of \$188,153 this year.

### **IV. FY2017 Update**

This activity did not experience any significant changes during this Plan year. SAHA may create its own local form(s) with a different expiration date or other elements to accommodate this activity.

### **V. FY2018 Expectations**

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. FY2018 benchmarks are the same as for FY2017; however, SAHA expects to update the average salary and benefits figures at time of reporting.

## VI. HUD Standard Metrics

<b>CE #1: Agency Cost Savings (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	Baseline average HAS salary (\$21.11) multiplied by 12,000 reexams	Next year's average HAS salary (\$21.11) multiplied by 8,000 reexams
	\$253,320/yr	\$168,880/yr

<b>CE #2: Staff Time Savings (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	# triennials multiplied by 1 hour	# triennials multiplied by 1 hour
	12,000 per year	8,000

<b>CE #5: Increase in Agency Rental Revenue(HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Rental revenue in dollars (increase). (Defined as Total HAP Expense)	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).
	\$304,222	\$304,222

<b>CE #5: Increase in Agency Rental Revenue(HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Rental revenue in dollars (increase). (Defined as Total HAP Expense)	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).
	\$304,222	\$304,222

## 9. FY2014-6: Rent Simplification (HCV)

This activity is designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY2013-2014 MTW Plan. Originally scheduled for implementation in July 2014, final implementation was delayed until January 2015.

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 FY2014-6.

Previously, rent calculation was 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.

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. SAHA will conduct time studies to verify the number of hours that staff spends calculating tenant rent portion. The quality control score will be obtained from an Access database.

Third-party verifications of assets is still required for assets totaling a value of \$25,000 or more.

### I. FY2017 Update

This activity did not experience any significant changes during this Plan year. Baseline and benchmark values have been updated for FY17 for CE #1 and #2. Previously, these metrics reflected an inconsistent methodology: CE #1 used per unit costs, and CE #2 used dollar figures. These metrics now include baselines and benchmarks calculated according to methodologies consistent with other CE #1 and #2 metrics.

### II. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. FY2018 benchmarks are the same as for FY2017; however, SAHA expects to update the average salary and benefits figures at time of reporting. CE#5 baselines and benchmarks were updated to include the per unit HAP expense multiplied by the total number of households on rent simplification.

### III. HUD Standard Metrics

<i>CE #1: Agency Cost Savings (HCV)</i>		
Unit of Measurement	Baseline	Benchmark
Total cost of task in dollars (decrease).	Average Staff Salary * 1 hours * # of households processed	Average Staff Salary * .25 hours * # of households processed
	\$21.11 * 1 * 2,679 = \$56,553.69	\$21.11 * .25 * 2,679= \$14,138.42

<b>CE #2: Staff Time Savings (HCV)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total time to complete the task in staff hours (decrease).	1 hour * # Households on Rent Simplification	.25 hours * # Households on Rent Simplification
	2,679	670

<b>CE #3: Decrease in Error Rate of Task Execution</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average error rate in completing a task as a percentage (decrease).	Quality Control Monthly Error Rate	Quality Control monthly Error Rate
	11%	5%

<b>CE #5: Increase in Agency Rental Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Rental revenue in dollars (increase). (Defined as Total HAP expenses)	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).
	CY2014 PUC \$557.06 * # of households processed	CY2014 PUC \$557.06 * # of households processed

<b>SS #1: Increase in Household Income</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$4,168	\$4,168

<b>SS #3: Increase in Positive Outcomes in Employment Status</b>		
<i>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.</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
<b>(6) Other (Heads with any Earned Income)</b>	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).



	1,102	1,102
<b>(6) Other (Heads with any Earned Income)</b>	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).
	29%	29%

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	47	47

<b>SS #8: Households Transitioned to Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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 full contract rent (no subsidy) 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 full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).
	0	0

#### **IV. Hardship Policy**

Households who experience a rent increase of \$26 or more due to the rent simplification calculation will be granted a hardship exemption and have the household'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.

## **10. FY2015-1: MDRC / HUD Rent Study**

### **I. Introduction**

This activity is designed to promote self-sufficiency, increase cost-effectiveness, and increase housing choices. It was originally approved as part of the FY2014-2015 MTW Plan.

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

A computer-generated program will randomly select the participants for the Study from the pool of eligible vouchers. The Study Group vouchers will be managed using the proposed policies. The Control Group vouchers will be 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 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.

### **II. Description of Rent Reform Components**

The Study is designed to test an alternative strategy to standard HUD operating rules for the HCV program. The proposed alternative rent policies will include the following five 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, and
  - 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.
  - 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.

Additionally, the Study will offer appropriate hardship protections to prevent any Study Group member from being unduly impacted as discussed in Section V below.

#### **A. Description of the Rent Reform Activity**

##### **1) Simplified Income Determination and Rent Calculation**

Under the current HUD regulations, the total tenant payment (TTP) is a calculation derived from the voucher household’s 30% adjusted monthly income (gross income less HUD prescribed deductions and allowances). SAHA follows a process of interviewing the household to identify all sources of income and assets, then proceeds to verify the information and perform the final calculation. The process is complex and cumbersome, which increases the risk of errors. According to HUD’s Occupancy Handbook, Chapter 5 “Determining Income and Calculating Rent,” the most frequent errors found across PHA’s are: Voucher holders failing to fully disclose income information; errors in identifying required income exclusions; and incorrect calculations of deductions often resulting from failure to obtain third-party verification. The complexity makes the HCV program less transparent and understandable by the public, landlords, and voucher holders.

##### **2) Elimination of Deductions**

SAHA proposes a new method of calculation, which eliminates the calculation of deductions and allowances in the determination of annual income.

###### **a) Percent Annual Gross Income.**

The Total Tenant Payment (TTP) rent calculation will be determined by establishing gross annual income and then determining the greater of 28% of the gross monthly income or the minimum rent of \$100.

###### **b) Elimination of Income from Assets valued less than \$25,000**

SAHA will eliminate the verification and calculation of income earned from household assets valued less than \$25,000. Households would not be required to document assets worth less than that amount. This will reduce administrative costs and simplify the program for greater transparency and program compliance.

c) Review of Retrospective Income.

To establish annual gross income for the three year certification period, SAHA will review the total household income without deductions for the twelve-month period prior to recertification, i.e., the “Retrospective Gross Income.” A household’s annual gross income will depend on its *Retrospective Gross Income* during a 12-month “look back” period.

At the certification, if a household’s current/anticipated income is less than its retrospective gross income by more than 10%, a “temporary” TTP based on current income alone will be set for six-month grace period. After that grace period, the TTP will automatically be switched to the TTP amount based on the previously determined average retrospective gross income. No interim recertification interview would be required to reset this TTP.

d) Capping the Initial Maximum Rent Burden

HUD places a rent maximum for households moving into a new unit under the housing choice voucher subsidy. This maximum rent burden is determined to be 40% of the household’s adjusted annual income. However, under the Rent Reform Study the PHA will no longer be adjusting household income using deductions and allowances. The household must not pay more than 40 percent of gross current monthly income for the family share when the family first receives voucher assistance in a particular unit. (This maximum rent burden requirement is not applicable at reexamination if the family stays in place).

3) Triennial Certifications

SAHA currently performs re-certification of HCV households on an annual basis. The annual certification will review program eligibility, household composition, income and other household circumstances. Additional re-examinations (“interim certifications”) may be required for changes in the household situation such as: composition, income, and change in unit.

SAHA proposes performing re-certification of the Study Group every third year (triennial). The triennial certification will review program eligibility, household composition, current income and income over the past twelve months (“retrospective income”), unit information and shall set the Total Tenant Portion (TTP) and the household share of the rent. The TTP for the Study Group will remain in effect during the three year certification period, with some exceptions related to decreases in income and changes in household.

Under the alternative rent policy, a household's annual gross income will be determined using its reported (and verified) *retrospective gross income* during a 12-month "look-back" period. (In this calculation, gross income will exclude any prior income from sources that have expired for the household during that period, such as TANF or Unemployment Insurance benefits, since the household can no longer count on them. It will include imputed welfare income – i.e., any sanctioned portion of a household's TANF grant). SAHA will create a local form to supplement the HUD form 9886 to provide tenant consent for SAHA to collect information relevant to the triennial recertification period.

If the household has an increase in income between certifications, the household's TTP will not be re-determined and increased to reflect the higher income. However, if the household has a decrease in income, the household may request and SAHA may provide an interim re-certification or other remedies under the hardship process (see Section V). The interim re-certification will be conducted when a household has a reduction of income of more than 10% from the retrospective gross income.

- a) SAHA interim certification will re-calculate the household TTP based on a new retrospective gross income review to determine the greater of 28% of the retrospective gross income or the minimum rent of \$100. This retrospective gross income will establish the TTP that will remain in effect until the sooner of the next triennial certification; or a tenant requested interim certification. The tenant may only request one interim certification per year. The year period during which only one interim is permitted begins on the effective date of the triennial recertification and ends 12 months later.
- b) At the triennial certification at the beginning of the three-year period (and at subsequent triennials) if a household's current/anticipated gross income is less than its retrospective gross income by more than 10%, the current income alone will be used to create a "temporary" TTP for a six-month grace period. After that grace period, the TTP will automatically be switched to the TTP amount based on the previously determined retrospective gross income. No interim recertification interview would be required to reset this TTP.
- c) At the initial triennial certification only, if a household's childcare expense exceeds \$200 per month, the gross income will be reduced by a deduction of reasonable childcare cost above the \$200 per month, to create a "temporary" TTP for a six-month grace period. SAHA defines reasonable childcare costs as less than \$3,000 per year for one child and \$6,000 per year for two children. After that grace period, the TTP will automatically be switched to the TTP amount based on the previously determined retrospective gross income. No interim recertification interview would be required to reset this TTP.
- d) The Study Group will be allowed one request per year for an interim certification to reset their TTP. The year period during which only one interim is permitted begins on the effective date of the triennial recertification and ends 12 months later. The TTP will only be reset if a household's new retrospective monthly

income (at the time of the request) is more than 10% lower than its most recent prior retrospective gross monthly income. If the limit on interim certification presents a hardship, the household will need to apply for a Hardship Exemption (See Section V below).

#### 4) **Streamline Interim Certifications**

SAHA will institute a streamlined interim certification process for the Study Group to report change of circumstance that does not require adjustment in subsidy. For these events, SAHA will not request income information. These events include:

- a) Changes to household composition. The Study Group must report both additions and removal of members to the household to SAHA to determine program eligibility and other HUD required reporting (e.g. deceased tenant reporting). However, unless the addition of an adult member changes the voucher bedroom size appropriate for the household composition to prevent overcrowding or over-housing, SAHA will not request income information for the new household member until the next scheduled triennial certification.

If the loss of a household member results in a reduction of more than 10% of the most recent retrospective gross income, the household will be allowed to reset their TTP.

In the event that the new or removed member requires a change to the voucher bedroom size, SAHA will review the retrospective gross income of the newly added or removed household members, apply a new utility allowance, and will reset the household TTP. A reduction in subsidy for new voucher bedroom size will be implemented when the current lease ends and new lease begins.

Changes to household composition will not be counted towards the limit of one requested interim certification per year.

- b) Change of unit. Households seeking to move to a new unit will submit a request for move pursuant to current procedures. For households that move to more expensive units during three-year period, SAHA will absorb the higher contract rent costs up to the lesser of the gross rent or the payment standard, which is consistent with traditional rent rules. However, unless the request for move is due to a change in household composition, SAHA will not request income information or reset the household TTP until the sooner of the next scheduled triennial certification or tenant requested interim certification to reset TTP. SAHA will apply new utility allowance schedule, if any, to the household at the new lease effective date.
- c) Changes in Utility Allowances. When utility schedules are updated to reflect rate changes, utility allowances, and utility allowance payments (UAPs) will be adjusted only when HAP subsidies or TTPs are recalculated for other reasons. More specifically, updated utility schedules will be applied when households:

- Change their contract rent,

- Recertify and the TTP is recalculated during interim or triennial,
- Move to new units, or
- Change their household composition requiring a change in voucher size.

5) **Minimum Rent to Owner**

Currently, HUD does not require minimum rents to be paid by the voucher holder to the landlord. SAHA is proposing that Study Group members will be required to make a minimum payment of at least \$100 direct to the HCV landlord in addition to SAHA's portion of rent (Housing Assistance Payment "HAP"). The total amount of rent will equal the contract rent established in the lease. This policy mirrors the market system of tenants paying owners directly and creates a closer relationship and sense of responsibility for both the leaseholder HCV household and the property owner.

The amount of rent to owner the Study Group will pay is equal to their TTP less the Utility Allowance plus any amount over the payment standard for which the tenant may be responsible to pay. The Study Group rent to owner will not be less than the minimum rent. In the event that the Study Group household TTP less the Utility Allowance is less than the minimum rent, the household will pay the Owner the minimum rent and SAHA will reimburse the household the balance of the Utility Allowance. However, if the minimum rent to owner exceeds 40% of the household current/anticipated gross income, the household may request a Hardship Exemption as detailed in Section V below.

6) **Simplified Utility Allowance Schedule.**

Currently, SAHA annually reviews and periodically re-establishes a Utility Allowance Schedule which represents the reasonable expectation of costs for utilities as part of the tenant's lease.

The utility allowance is based on utility surveys and analysis of the type of structure, bedroom size, appliances provided by tenant, and type of appliances (gas/electric). The simplified schedule is based on the analysis of data collected from SAHA's existing HCV portfolio including the most common structure and utility types. This new utility allowance schedule will be implemented upon the triennial certification or change of unit.

SAHA proposes a simplified schedule to reduce administrative costs and reduce errors associated with the traditional method of applying Utility Allowance Schedule. 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 the Study Group members who will be able to use this new schedule to clarify gross rent in their selection of housing units.

This schedule will be applied to the lesser of: the actual size of the unit or the size of the voucher rather than the larger of the actual unit size or the voucher size. 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).

### Proposed Flat Utility Allowance

Bedroom Size	Flat Rate
0	\$ 75
1	\$ 94
2	\$124
3	\$174
4	\$214
5	\$277
6	\$290
7	\$333

### III. FY2015 Update

During FY2015, SAHA worked with HUD and MDRC to lay the groundwork for the implementation of this activity. SAHA updated the Administrative Plan, updated procedures, trained and prepared the proper staffing of housing specialists and has made modifications to its housing software in order to implement these activities. SAHA also started to enroll households into the Study and Control Groups.

### IV. FY2016 Update

SAHA anticipated that enrollment would continue for several months into FY2016, through January 2016. This meant that many of the metrics would need to evaluate in the context of a half-year of full implementation.

### V. FY2017 Update

This activity did not experience any significant changes during this Plan year. SAHA may create its own local form(s) with a different expiration date or other elements to accommodate this activity.

### VI. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. FY2018 benchmarks are the same as for FY2017.

### VII. HUD Standard Metrics

The information in the table shaded blue represents information intended for guidance; while the information in non-shaded boxes represents SAHA specific information. For purpose of this section, year one represents the first fiscal year where activities are implemented.



**CE #1: Agency Cost Savings**

Unit of Measurement	Baseline	Benchmark
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).
<b>Cost per Annual Certification</b>	<p><u>YEAR 1:</u> Baseline is equal to: <b>\$12,657.50</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>\$12,657.50</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>\$12,657.50</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>\$37,972.50</b></p> <ul style="list-style-type: none"> <li>● <b>Baseline Time to calculate annual certification: 830 hours</b></li> <li>● <i>Times</i> average staff wage: <b>\$15.25</b></li> </ul>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>\$5,947.50</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>\$0</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>\$0</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>\$5,947.50</b> Savings is equal to: <b>\$32,025.00</b></p> <ul style="list-style-type: none"> <li>● <b>Benchmark Time to calculate annual recertification: 390 hours</b></li> <li>● <i>Times</i> average staff wage: <b>\$15.25</b></li> </ul>
<b>Cost per Interim Certification</b>	<p><u>YEAR 1:</u> Baseline is equal to: <b>\$6,328.75</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>\$6,328.75</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>\$6,328.75</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>\$18,986.25</b></p> <ul style="list-style-type: none"> <li>● <b>Baseline Time to calculate interim certification: 415 hours</b></li> <li>● <i>Times</i> average staff wage: <b>\$15.25</b></li> </ul>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>\$2,973.75</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>\$2,973.75</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>\$2,973.75</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>\$8,921.25</b> Savings is equal to: <b>\$10,065.00</b></p> <ul style="list-style-type: none"> <li>● <b>Benchmark Time to calculate interim recertification: 195 hours</b></li> <li>● <i>Times</i> average staff wage: <b>\$15.25</b></li> </ul>

<p><b>Cost of Rent Calculation</b></p>	<p><u>YEAR 1:</u> Baseline is equal to: <b>\$5,032.50</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>\$5,032.50</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>\$5,032.50</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>\$15,097.50</b></p> <ul style="list-style-type: none"> <li>● <b>Baseline Time to calculate rent: 330 hours</b></li> <li>● <i>Times</i> average staff wage: <b>\$15.25</b></li> </ul>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>\$1,982.50</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>\$0</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>\$0</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>\$1,982.50</b> Savings is equal to: <b>\$13,115</b></p> <ul style="list-style-type: none"> <li>● <b>Baseline Time to calculate rent: 130 hours</b></li> <li>● <i>Times</i> average staff wage: <b>\$15.25</b></li> </ul>
<p><b>Unit of Measurement</b></p>	<p><b>Baseline</b></p>	<p><b>Benchmark</b></p>
<p><b>Cost to Determine Income from Assets</b></p>	<p><u>YEAR 1:</u> Baseline is equal to: <b>\$19.29</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>\$19.29</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>\$19.29</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>\$57.87</b></p> <ul style="list-style-type: none"> <li>● <b>Baseline Time to determine Income from Assets: 1.27 hours</b></li> </ul> <p><i>Times</i> average staff wage: <b>\$15.25</b></p>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>\$2.52</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>\$0</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>\$0</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>\$2.52</b> Savings is equal to: <b>\$55.36</b></p> <ul style="list-style-type: none"> <li>● <b>Benchmark Time to determine Income from Assets: 0.17 hours</b></li> <li>● <i>Times</i> average staff wage: <b>\$15.25</b></li> </ul>

<b>Cost to Determine utility allowance</b>	<u>YEAR 1:</u> Baseline is equal to: <b>\$2,952.50</b>	<u>YEAR 1:</u> Benchmark is equal to: <b>\$1,372.50</b>
	<u>YEAR 2:</u> Baseline is equal to: <b>\$2,952.50</b>	<u>YEAR 2:</u> Benchmark is equal to: <b>\$0</b>
	<u>YEAR 3:</u> Baseline is equal to: <b>\$2,952.50</b>	<u>YEAR 3:</u> Benchmark is equal to: <b>\$0</b>
	<u>OVERALL:</u> Baseline is equal to: <b>\$7,777.50</b>	<u>OVERALL:</u> Benchmark is equal to: <b>\$1,372.50</b> Savings is equal to: <b>\$6,405</b>
	<ul style="list-style-type: none"> <li>• <b>Baseline Time to determine Utility Allowance: 170 hours</b></li> <li>• <i>Times average staff wage: \$15.25</i></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Benchmark Time to determine Utility Allowance: 90 hours</b></li> <li>• <i>Times average staff wage: \$15.25</i></li> </ul>

<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).

<p><b>Time to Complete Annual Certification</b></p>	<p><u>YEAR 1:</u> Baseline is equal to: <b>830 hours</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>830</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>830</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>2,490 hours</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Complete Annual Certification (not including 0.66 hours of preparation): 0.83 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> </ul>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>390 hours</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>0</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>0</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>390 hours</b></p> <p>Savings is equal to: <b>2,100 hours</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Complete Annual Certification (not including 0.66 hours of preparation): 0.39 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> </ul>
<p><b>Time To Determine Tenant Rent</b></p>	<p><u>YEAR 1:</u> Baseline is equal to: <b>330</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>330</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>330</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>990</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Determine Tenant Rent: 0.33 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> </ul>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>130</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>0</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>0</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>130</b></p> <p>Savings is equal to: <b>860</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Determine Tenant Rent: 0.13 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> </ul>

<p><b>Time to Determine Utility Allowance</b></p>	<p><u>YEAR 1:</u> Baseline is equal to: <b>170 hours</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>170</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>170</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>510</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Determine Utility Allowance: 0.17 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> </ul>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>90 hours</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>0</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>0</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>90</b></p> <p>Savings is equal to: <b>420</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Determine Utility Allowance: 0.09 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> </ul>
---	---	--

Unit of Measurement	Baseline	Benchmark
<p><b>Time to Determine Income from Assets</b></p>	<p><u>YEAR 1:</u> Baseline is equal to: <b>1.27 hours</b></p> <p><u>YEAR 2:</u> Baseline is equal to: <b>1.27</b></p> <p><u>YEAR 3:</u> Baseline is equal to: <b>1.27</b></p> <p><u>OVERALL:</u> Baseline is equal to: <b>3.8 hours</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Determine Income from Assets: 0.33 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> <li>• <i>times</i> the estimated proportion of affected participants: 0.0038 (0.38%)</li> </ul>	<p><u>YEAR 1:</u> Benchmark is equal to: <b>0.17 hours</b></p> <p><u>YEAR 2:</u> Benchmark is equal to: <b>0</b></p> <p><u>YEAR 3:</u> Benchmark is equal to: <b>0</b></p> <p><u>OVERALL:</u> Benchmark is equal to: <b>0.17 hours</b></p> <p>Savings is equal to: <b>3.63 hours</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Determine Income from Assets: 0.33 hours</b></li> <li>• <i>times</i> the number of study participants: <b>1000</b></li> <li>• <i>times</i> the estimated proportion of affected participants: 0.0005 (0.05%)</li> </ul>

<b>CE #3: Decrease in Error Rate of Task Execution</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
<b>Average Error Rate in Determining TTP</b>	Baseline is equal to: <b>Error rate: 18%</b>	Benchmark is equal to: <b>Error rate: 15%</b>
<b>Average Error Rate in Determining Utility Allowance</b>	Baseline is equal to: <ul style="list-style-type: none"> <li>• Error rate In Determining the Utility Allowance is <b>2%</b></li> </ul>	Benchmark is equal to: <ul style="list-style-type: none"> <li>• Maintain 2% Error Rate in Determining Utility Allowance</li> </ul>

<b>SS #1: Increase in Household Income</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
<b>Average Earned Income of Study Group</b>	Baseline is equal to: The Average Earned Income of Study Group: <b>TBD after random assignment</b>	Benchmark is equal to: The Average Earned Income of Study Group at first triennial recertification : <b>TBD after random assignment</b>

**SS #3: Increase in Positive Outcomes in Employment Status**

Unit of Measurement	Baseline	Benchmark
<p>Report the following information separately for each category:</p> <p>(1) Employed Full-Time</p> <p>(2) Employed Part-Time</p> <p>(3) Enrolled in an Educational Program</p> <p>(4) Enrolled in Job Training Program</p> <p>(5) Unemployed</p> <p>(6) Other</p>	<p>Head(s) of households in in the categories identified below prior to implementation of the activity (number). This number may be zero.</p> <p>Percentage of total work-able households in the categories identified below prior to implementation of activity (percent). This number may be zero.</p>	<p>Expected head(s) of households in in the categories identified below after implementation of the activity (number).</p> <p>Expected percentage of total work-able households in the categories identified below after implementation of the activity (percent).</p>
<p><b>Study Group Employment Status</b> for</p> <p>(1) Employed Full-Time:</p> <p>(2) Employed Part-Time:</p> <p>(3) Enrolled in an Educational Program:</p> <p>(4) Enrolled in Job Training Program:</p> <p>(5) Unemployed:</p> <p>(6) Other:</p>	<p>Baseline is equal to: The percentage of the Study Group</p> <p>(1) Employed FT: <b>TBD after random assignment</b></p> <p>(2) Employed PT: <b>TBD after random assignment</b></p> <p>(3) Enrolled in an Educational Program: <b>TBD after random assignment</b></p> <p>(4) Enrolled in Job Training Program: <b>TBD after random assignment</b></p> <p>(5) Unemployed: <b>TBD after random assignment</b></p> <p>(6) Other: <b>NA</b></p>	<p>Benchmark is equal to: The percentage of the Study Group</p> <p>(1) Employed FT: <b>TBD after random assignment</b></p> <p>(2) Employed PT: <b>TBD after random assignment</b></p> <p>(3) Enrolled in an Educational Program: <b>TBD after random assignment</b></p> <p>(4) Enrolled in Job Training Program: <b>TBD after random assignment</b></p> <p>(5) Unemployed: <b>TBD after random assignment</b></p> <p>(6) Other: <b>NA</b></p>

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
<b>Study Group Households Receiving TANF Benefits</b>	Baseline is equal to: <b>TBD after random assignment</b>	Benchmark is equal to: <b>TBD after random assignment</b>

<b>SS #5: Households Assisted by Services that Increase Self-sufficiency</b>		
<b>Self-sufficiency: A household in good standing transitions to self-sufficiency when their housing subsidy is reduced to \$0.</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
<b>Study Group Households Receiving Self-sufficiency Services</b>	Baseline is equal to: <b>TBD after random assignment</b>	Benchmark is equal to: <ul style="list-style-type: none"> <li>● The same number of Households Receiving Self-sufficiency Services</li> </ul> Note: 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.



<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
<b>Average HCV Subsidy for Study Group</b>	Baseline is equal to: <b>TBD after random assignment</b>	Benchmark is equal to: <b>TBD after random assignment</b>

<b>SS #7: Increase in Agency Rental Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
<b>Total HCV Tenant Share for Study Group</b>	Baseline is equal to: <b>TBD after random assignment</b>	Benchmark is equal to: <b>TBD after random assignment</b>

<b>HC #5: Increase in Resident Mobility</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0  The baseline for this activity is zero because the population selected for the rent reform	0  The benchmark for this activity is zero, the same as the baseline, because the rent reform activities are not

	activities has not been selected at this time.	designed to move families into neighborhoods of opportunity as an intended outcome.
--	--	---

**VIII. Hardship Policy**

SAHA is participating in the Study in order to further the national discussion regarding the future of the Housing Choice Voucher Program. The alternative rent strategies are not intended to create an undue burden on the Study Group members. SAHA has established the following Hardship Policy for Study Group members. Households participating in the Study as part of the Control Group will be subject to the current SAHA policies.

**A. Hardship Waiver Request Process.**

The process for requesting a waiver will be as follows:

- 1) A household must initiate a request for a hardship waiver, by completing and submitting a written hardship request to Housing Assistant Specialist.
- 2) The household must supply information and documentation that supports a hardship claim with their written request. For example, a household must provide proof of the following: loss of eligibility for a federal state, or local assistance program; loss of employment or reduction in work hours; or the incapacitation or death of an income-earning household member and amount of lost income.
- 3) If a household claims zero income as part of its hardship request, it must provide a detailed accounting of funds used to cover basic costs of living (food, personal/family care necessities, etc.). This information must be provided every 90 days.
- 4) To request hardship based on the risk of eviction for non-payment of rent or utilities, a household must provide a copy of written 10 day notice from the landlord of non-payment of rent and the landlord’s intent to terminate the household’s tenancy, or a notice from a utilities company warning of a utilities shut-off. Tenant must promptly deliver the 10 day notice from the Landlord well in advance of a scheduled court date for eviction proceedings.

**B. Hardship Waiver Criteria**

SAHA may determine a financial hardship exists when the household cannot pay the minimum rent or has an excessive rent burden. Households will be considered for a hardship waiver, as discussed below, if:

- 1) The hardship cannot be remedied by the one interim recertification permitted each year (which cannot reduce a household’s TTP below the minimum level).
- 5) The household is at an income level or experiences a loss of income and/or a TTP increase such that its total monthly TTP exceeds 40 percent of its current monthly gross income. The gross income will include imputed income in the same manner as current calculations.

- 6) The household faces risk of eviction for non-payment of rent – including utility shut-offs for non-payment of utility bills that could lead to eviction.
- 7) Other circumstances as determined by the housing agency.

#### **C. Hardship Review Process**

- 1) The administrative review of the household circumstances will be conducted by SAHA according to current review processes.
- 8) For hardship claims related to imminent risk of eviction, SAHA will conduct an expedited hearing process.
- 9) Where a hardship request is denied, the household may request an independent review or hearing of its case through the housing agency's normal grievance procedures.
- 10) SAHA will complete all information regarding the request for Hardship and the outcome in the system of record for tracking Hardship requests.

#### **D. Hardship Remedies**

- 1) The Hardship remedies may include any of the following:
  - a) Allowing an additional interim recertification beyond the normal one-per-year option. This could lower household's TTP (but only as low as the \$100 minimum TTP) until the next triennial recertification.
  - b) Setting the household's TTP at the minimum level for up to 90 days.
  - c) Setting the household's TTP at 28 percent of current income, for up to 180 days.
  - d) Offering a "transfer voucher" to support a move to a more affordable unit (including a unit with lower utility expenses).
  - e) A specific time frame for the temporary TTP or minimum rent may be established for longer than 180 days based on specific circumstances. However, the time frame will never go past the triennial recertification date.
  - f) Any combination of the above remedies.
- 11) During the period when the TTP is reduced, the housing agency will increase its payment to the landlord to cover the portion of the rent previously paid by the tenant directly to the landlord, and it will notify the landlord of the change and the time period of the increased payments.
- 12) In addition to the remedy or remedies offered, the household may be referred to federal, state or local assistance programs to apply for assistance, or to obtain verification that they are ineligible to receive benefits.
- 13) The Hardship remedies are subject to the following limitations:
  - a) The tenant portion of the rent payments will not be suspended prior to a hardship designation.

- b) Remedies will not affect any rent attributable to a gross rent that exceeds the applicable payment standard.
- c) Opting out of the alternative rent policy is not a remedy option.

#### **E. End of Hardship Waiver Period**

- 1) If the hardship continues, the household may submit a request for an extension of the hardship remedy. However, the time frame will never go past the triennial recertification date.
- 14) At the end of the hardship waiver period, the household's regular TTP will be reinstated.

### **IX. Transition Period**

#### **A. Selection of Participants**

Study Participants will be randomly selected from the eligible vouchers through a computer generated random selection program. Eligible vouchers will specifically exclude the following:

- 1) Vouchers not currently administered under the Moving to Work Program:
  - a) Veterans Affairs Supportive Housing (VASH)
  - b) Moderate Rehabilitation
  - c) Shelter Plus Care
- 15) Enhanced Vouchers
- 16) HUD Project Based Vouchers
- 17) Vouchers administered under portability
- 18) Elderly households: Head of Household, co-head, spouse or single member households 62 years or older pursuant to the Administrative Plan
- 19) Households headed by people older than 56 years of age (who will become seniors during the course of the long-term study).
- 20) Disabled households: Head of Household, co-head, spouse or single member households with disability as defined in the Administrative Plan
- 21) Households currently participating in the Family Self-sufficiency Program
- 22) Households participating in the Homeownership Program
- 23) Households that contain a mix of eligible and non-eligible household members would not be included in the Study

#### **B. Enrollment of Study Group members**

- 1) Prior to Certification Meeting

Selected Study Group members will receive special information with their recertification package to introduce them to the rent reform policies and to answer household questions. SAHA will conduct the triennial certification at the time otherwise scheduled for the household annual certification.

2) During Certification Meeting

At the initial triennial certification, the household will have the changes in rent reform policies explained to them. They will be provided with a gift card as a nominal thank you for providing filling out a base information form.

Changes in the household share, TTP, utility schedule allowance will be provided to the household with no less than 30 days' notice.

3) Mitigation of impact at initial triennial certification

A "grace period" of six months will be provided to mitigate the impact of the transition for the following two cases:

- a) At the triennial certification at the beginning of the three-year period (and at subsequent triennials), if a household's current/anticipated income is less than its retrospective income by more than 10%, the current income alone will be used to create a "temporary" TTP for a six-month grace period.
- b) At the initial triennial certification only, if a household's childcare expense is above \$200 per month, the gross income will be reduced by a deduction of reasonable childcare cost above the \$200 to create a "temporary" TTP for a six-month grace period.

After that grace period, the TTP will automatically be switched to the TTP amount based on the previously determined average prior income. No interim recertification interview would be required to reset this TTP.

## **11. FY2015-2: Elderly Admissions Preference at Select Public Housing Sites**

This activity is designed to meet the statutory objective of increasing housing choices for low-income families and was originally approved as part of the FY2014-2015 MTW Plan.

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:

- 1) reducing the number of problems that arise from these mixed populations sharing the same housing;
- 2) slowing what had been a sharply increasing rate of non-elderly disabled households moving in, and
- 3) 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.

When a property reaches its target 4-to-1 ratio of elderly to non-elderly residents, SAHA will start to draw applicants using a 1-to-1 ratio of elderly to non-elderly applicants in order to maintain the overall 4-to-1 balance. Should the mix ever tip in the other direction and start to house elderly residents at a higher ratio than 4-to-1, then SAHA will draw non-elderly disabled residents at a higher rate than elderly residents in order to maintain the overall 4-to-1 balance.

This activity impacts only two public housing communities, and only 85 units over 3-5 years. The impact will be gradual, at a rate of around 20 units per year for both properties. The first

communities at which this policy was applied were Fair Avenue and WC White. The following section describes how the activity works at each community.

### I. Fair Avenue

The total number of units at Fair Avenue is 216, making 173 the 80% target for elderly households. Currently, Fair Avenue is home to 110 elderly (62 and over) households. So Fair Avenue needs to add 63 elderly households to meet the 80% target. The turnover rate for Fair Avenue last year was 19.9% (3.5 units per month), or 43 units over the course of the year.

If the turnover rate is the same for this plan year, SAHA expects those 43 available units to be offered to 35 elderly households and 8 non-elderly disabled households. Specifically, the first four available units would be offered to elderly households, and the fifth available unit would then be offered to a non-elderly disabled household. The sixth through ninth units would be offered to elderly households, and the tenth to a non-elderly disabled household. That sequence, repeated through the year in 8 full cycles and 1 partial cycle, is represented in the following table, where “E” represents Elderly Household and “NE” represents Non-elderly Disabled Household.

Fair Avenue: Admissions cycle and estimated time frame based on turnover rate of 3.5 units per month	E	E	E	E	NE
<b>1 (Jul – Aug)</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>2 (Aug-Sep)</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
<b>3 (Sep-Oct)</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>
<b>4 (Nov-Dec)</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>
<b>5 (Dec-Jan)</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>
<b>6 (Jan-Feb)</b>	<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>
<b>7 (Mar-Apr)</b>	<b>31</b>	<b>32</b>	<b>33</b>	<b>34</b>	<b>35</b>
<b>8 (Apr-May)</b>	<b>36</b>	<b>37</b>	<b>38</b>	<b>39</b>	<b>40</b>
<b>9 (May-Jun)</b>	<b>41</b>	<b>42</b>	<b>43</b>		
<b>Total admissions at the end of the plan year</b>	<b>35</b>				<b>8</b>

Assuming that turnover is proportionally distributed between elderly and non-elderly units, SAHA expects the number of elderly households at Fair Avenue to increase to 123 by the end of the plan year.

Household Type	Current number of units	Number made available due to turnover (subtract)	Number offered based on admissions preference (add)	Net change	Total number at end of plan year
Non-Elderly Disabled	106	-21	+8	-13	93
Elderly	110	-22	+35	+13	123

At the net rate of 13 units per year, Fair Avenue will reach the goal of adding 63 elderly households in 4 to 5 years.

The variable that SAHA knows the least about today is how turnover will be distributed between elderly and non-elderly households. This calculation assumes that turnover is proportionally distributed between the household types. As the year progresses and actual data comes in, this assumption can be corrected with a better projection.

## II. WC White

The total number of units at WC White is 75, making 60 the 80% target for elderly households. Currently, WC White is home to 38 elderly (62 and over) households. So the community needs to add 22 elderly households to meet the 80% target. The turnover rate for WC White last year was 25.33% (1.6 units per month), or 19 units over the course of the year.

If the turnover rate is the same for this plan year SAHA expects those 19 available units to be offered to 16 elderly households and 3 non-elderly disabled households. Specifically, the first four available units would be offered to elderly households, and the fifth available unit would then be offered to a non-elderly disabled household. The sixth through ninth units would be offered to elderly households, and the tenth to a non-elderly disabled household. That sequence, repeated through the year in 3 full cycles and 1 partial cycle, is represented in the following table, where “E” represents Elderly Household and “NE” represents Non-elderly Disabled Household.

WC White: Admissions cycle and estimated time frame based on turnover rate of 1.6 units per month	E	E	E	E	NE
1 (Jul – Sep)	1	2	3	4	5
2 (Oct-Dec)	6	7	8	9	10
3 (Jan-Apr)	11	12	13	14	15
4 (Apr-Jun)	16	17	18	19	



<b>Total admissions at the end of the plan year</b>	<b>16</b>	<b>3</b>
---	-----------	----------

Assuming that turnover is proportionally distributed between elderly and non-elderly units, SAHA expects the number of elderly households at WC White to increase to 44 by the end of the plan year.

Household Type	Current number of units	Number made available due to turnover (subtract)	Number offered based on admissions preference (add)	Net change	Total number at end of plan year
Non-Elderly Disabled	<b>37</b>	<b>-9</b>	<b>+3</b>	<b>-6</b>	<b>31</b>
Elderly	<b>38</b>	<b>-10</b>	<b>+16</b>	<b>+6</b>	<b>44</b>

At the net rate of 6 units per year, Fair Avenue will reach the goal of adding 22 elderly households in 3 to 4 years.

The variable that SAHA knows the least about today is how turnover will be distributed between elderly and non-elderly households. This calculation assumes that turnover is proportionally distributed between the household types. As the year progresses and actual data comes in, this assumption can be corrected with a better projection.

### **I. FY2015 Update**

This activity did not begin implementation until November 1, 2014. The agency's priority up to that time was increasing occupancy across the public housing portfolio. Since November, the agency actually saw a very low rate of elderly household applicants at all properties. As a result, staff were challenged with trying to implement the activity while maintaining a high occupancy at Fair and WC White.

### **II. FY2016 Update**

Benchmarks were updated for FY2016 to reflect the 2<sup>nd</sup>-year targets of the original model.

### **III. FY2017 Update**

This activity did not experience any significant changes during this Plan year.

#### IV. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks. Benchmarks in FY2018 will remain the same as FY2017.

#### V. HUD Standard Metrics

<i>HC #5: Increase in Resident Mobility</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total number of elderly households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	148	186
At Fair Avenue, number of elderly households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	110	136
At WC White, number of elderly households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	38	50

#### VI. SAHA Metrics

<i>Elderly Household Percentage</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
At Fair Avenue, percentage of units occupied by elderly households.	110 of 216 total units (51%)	136 of 216 total units (63%)
At WC White, percentage of units occupied by elderly households.	38 of 75 total units (51%)	50 of 75 total units (67%)

## **12. FY2015-3: Modified Project Based Vouchers**

This activity is designed to meet the statutory objectives of increasing housing choices for low-income families and increasing cost effectiveness, and was originally approved as part of the FY2014-2015 MTW Plan.

This activity modifies the standard Project Based Voucher program in two ways.

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, 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 local project based set aside voucher. The removal of the automatic provision reduces HAP costs, and also stabilizes overall occupancy at the communities where vouchers are committed. Previously, activity FY2011-8 provided a tenant-based voucher to a household after two years in the local project based set aside unit.

### **I. FY2016 Update**

Starting in FY2016, this activity no longer tracked Occupancy (a non-standard SAHA metric). In previous years, project based vouchers were used at Springhill for the sole purpose of increasing occupancy. No project based vouchers were expected to be used at Springhill starting FY2016, so the metric was no longer necessary. In the FY2015 MTW Plan, metrics for Wheatley Courts and Victoria Commons Chavez Multifamily were included in this activity. Due to changing development timelines, they were not included in the FY2016 MTW Plan. Metrics were updated accordingly for FY2016.

SAHA did not anticipate project-basing any new housing choice vouchers in FY2016. Thirty-one (31) vouchers project-based last year remained at San Juan.

### **II. FY2017 Update**

This activity did not experience any significant changes during this Plan year. SAHA is on schedule to project-base 8 units at East Meadows Phase I. This property is already leasing and expected to be 100% occupied by June 2017.

### III. FY2018 Expectations

SAHA does not anticipate any significant changes to this activity in the Plan year.

Benchmarks have been updated to reflect updated construction schedules and project-based voucher commitments. Specifically, SAHA plans to project-base an additional 36 units at Wheatley Senior Living (Wheatley CNI Phase 3).

### IV. HUD Standard Metrics

<b>HC #1: Additional Units of Housing Made Available</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
# of additional units made affordable to households based on their actual ability to pay (at or below 80% AMI)	0	Cumulative: 75 FY2018: 36
Gardens at San Juan	0	31
East Meadows Phase I	0	8
Wheatley Senior Living	0	36

<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).  # of units * average per unit cost (PUC) * 12 months	Expected cost of task after implementation of the activity (in dollars).  # of units * average per unit cost (PUC) * 12 months
Gardens at San Juan	31 * \$563.38 * 12 = \$209,577	\$0.00
East Meadows Phase I	8 * \$563.38 * 12 = \$54,084	\$0.00
Wheatley Senior Park Living	36 * \$563.38 * 12 = \$243,380	\$0.00

<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).  # of recertifications after 2 years (due to new biennial recertification schedule) * average staff time per recertification (in hours)	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).
Gardens at San Juan	31 * 1.5 = 47 hours	0 hours
East Meadows Phase I	8 * 1.5 = 12 hours	0 hours
Wheatley Senior Park Living	36 * 1.5 = 54 hours	0 hours

## V. SAHA Metrics

<i>Median household income</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Median income of households living in local project based set-aside voucher units, by income bracket		
80% AMI	80% AMI	75% AMI
60% AMI	60% AMI	55% AMI
50% AMI	50% AMI	45% AMI
30% AMI	30% AMI	25% AMI

### 13. FY2015-4: Simplified Utility Allowance Schedule

This activity is designed to meet the statutory objective of increasing cost effectiveness, and was originally approved as part of the FY2014-2015 MTW Plan.

Currently, 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).

Based on current utility rates the simplified schedule is:

Bedroom Size	0	1	2	3	4	5	6
Utility cost (\$)	75	94	124	174	214	277	290

#### I. FY2017 Update

This activity did not experience any significant changes during this Plan year.

Benchmark was updated for CE# 1 to reflect changing staff costs. Baseline and benchmark values, in previous plans listed as "Values forthcoming", have been provided this year for CE #5.

## II. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks.

## III. HUD Standard Metrics

<b>CE #1: Agency Cost Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	0.17 hours multiplied by 11,727 households = 1850 hours multiplied by average staff cost \$15.25	0.09 hours multiplied by 10,881 households = 979 hours multiplied by average staff cost \$15.25
	\$28,212.50	\$14,929.75

<b>CE #2: Staff Time Savings</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Time to Determine Utility Allowance	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours): 0.17 hours times 11,727 households = 1850 hours	0.09 hours times 10,881 households = 979 hours

<b>CE #3: Decrease in Error Rate of Task Execution</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	Utility Allowance Error Rate = 2%	Utility Allowance Error Rate = 2%

<b>CE #5: Increase in Agency Rental Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$599,829	\$844,474

#### **IV. Hardship Policy**

Households will have recourse to the same hardship policy described in FY2014-6 Rent Simplification activity. Households who experience a rent increase of \$26 or more due to the rent simplification calculation will be granted a hardship exemption and have the household's TTP calculated in accordance with 24 CFR 5.628 (i.e., non-MTW TTP calculation). If the rent increase is not directly related to utility allowance increase, the TTP calculation will include the simplified utility allowance.

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 recertification.



## 14. FY2016-2- Biennial and Triennial Notification of Rent Type Option

This activity is proposed to increase cost effectiveness, through a more efficient coordination of communication with residents, and was originally approved as part of the FY2015-16 MTW Plan. PHAs are typically obligated to periodically (once a year) inform Public Housing Residents that they have an option of paying income-based rent or a flat rent. The PHA must give each family the opportunity to choose between the two methods for determining the amount of tenant rent payable monthly by the family.

As more residents move to biennial and triennial reexamination schedules, however, the number of staff interactions with residents decreases. It becomes more efficient to coordinate communication and notification requirements during a single visit, and notify residents of their option in accordance with their new schedules. A resident may still choose a different rent type at any time, independent of the notification.

### I. FY2017 Update

This activity did not experience any significant changes during this Plan year.

### II. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks.

### III. HUD Standard Metrics

<i>CE #1: Agency Cost Savings (HCV)</i>		
Unit of Measurement	Baseline	Benchmark
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).
	Staff time (\$26.44 * 7 = \$185.08) plus material costs of \$2863 = \$3048	Staff time (\$26.44 * 3.5 = \$92.54) plus material costs of \$1431 = \$1524

<i>CE #2: Staff Time Savings (HCV)</i>		
Unit of Measurement	Baseline	Benchmark
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).
	7 hours	3.5 hours

## **B. Not Yet Implemented Activities**

### **15. FY2017-1: Time-limited Working Household Referral Program**

This activity is designed to achieve the MTW statutory objective to give incentives that promote self-sufficiency, by providing working households in need of short-term housing assistance an opportunity to quickly access public housing units. This activity seeks to provide targeted assistance to a subset of households that 1) are working, and 2) would benefit from a period of increased housing stability to complete education/training, increase savings, or accomplish another self-sufficiency goal. These households will benefit from accelerated access to housing units, and, due to the time limit on the housing assistance, will transition out within 5 years. By focusing on households that have already started on the path to self-sufficiency, this activity should accelerate the number of households that actually transition to self-sufficiency during the period they receive housing assistance.

#### **1. Overview**

This activity provides time-limited public housing assistance to working households referred to SAHA by Workforce Solutions Alamo (WSA). Households referred to SAHA by WSA will receive five years of public housing assistance. If, at the end of five years, a hardship exists, two additional years of assistance are made available.

Upon starting housing assistance, participating households are required to enroll and participate in a SAHA self-sufficiency program such as Jobs-Plus or FSS.

Households will typically use the conventional public housing rent structure and biennial recertification schedule (per MTW Activity FY2014-4). However, both structure and schedule will be affected by the requirements of the self-sufficiency program selected by the household. For example, those enrolled in FSS will make use of an escrow account. Those in Jobs-Plus will have the option to establish an Earned Income Disregard (EID). For households living in Cassiano, the new Cassiano Jobs-Plus program will require an EID.

The total number of households to be served under this activity is currently capped at 200, and will be pulled in at a rate of 25 per quarter. Over 20,000 households are currently on the public housing waitlist. The 200 time-limited households represent 1% of that waitlist. As a result, providing these households with housing assistance will have a very limited impact on other households currently on the waitlist, especially at the draw rate of 25 per quarter. Additionally, it is expected that the time-limited units will turn over faster than standard units, creating more housing opportunities in the long run.

However, SAHA is taking steps to minimize any short-term negative impacts to non-participants. SAHA will reach out to households currently in waitlist pools whose applications indicate that they are working to notify them of the opportunity provided by this new program. Also, properties with extremely long wait times are being made unavailable to time-limited households, in order to not extend the already long wait times even longer.

## 2. Previous Pilot

Previously, a pilot project (MTW Activity FY2013-1) was approved as part of the FY2013 MTW Plan. The pilot ended in FY2016. FY2013-1 is now closed out and is replaced with this activity, FY2017-1. This activity builds on the lessons learned from the pilot. Some of those lessons included:

- The pilot activity relied on applicants self-identifying as working households during the application process. A wait list preference was provided to these applicants. However, many applicants that selected the working household preference were in fact not actually working. As a result, staff and applicants spent valuable time in initial meetings that did not result in successful placements. This new activity addresses this challenge by removing the preference. In its place, households will be eligible for a time-limited unit if they are referred by a partner workforce agency.
- Pilot households were required to participate in FSS or similar self-sufficiency activity, but did not always do so. Staff identified a number of factors, including: lack of clear communication and immediate follow up on the requirement, pilot households living in elderly communities (where there are no FSS or Jobs-Plus staff), and the novelty of the requirement (for both staff and applicants). The new activity addresses these factors by partnering closely with workforce partners who will assist in communication, as well as increased understanding of what training areas need to be emphasized.

Activity elements that remain consistent with the pilot include:

- Working households who participate in this activity will receive five years of housing assistance, with a two-year extension if needed based on hardship.
- 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 or Jobs-Plus participation is required -- each FSS and Jobs-Plus family receives case management services from a Case Manager who maintains close communication with the family and works with them to develop individualized plans. These plans establish specific interim and final goals to measure the family's progress toward fulfilling its obligations and becoming self-sufficient.

Changes and new elements that will be incorporated into the MTW Activity to improve program outcomes include:

- The pilot had been oriented to increasing housing choice and self-sufficiency. Now that this activity is referral-driven (instead of wait list preference-driven), the rationale for increasing housing choice by decreasing wait list time is no longer applicable. Instead, the activity will be focused solely on self-sufficiency.
- Households that participated in the previous pilot and remain in good standing will be rolled over automatically into the new program, and their time spent in the pilot will not count against the five-year time limit (the "clock is reset")

- SAHA and WSA staff are developing a branding and communication strategy regarding the referral program
- SAHA staff will increase messaging of requirements and time limits backed up with strong written policies and procedures
- CDI and PH staff coordinate activities using a master tracking worksheet, that tracks the following:
  - Specific instances when the 5-year term limit is being communicated to participating households
  - If the family refuses to participate in FSS, CDI will inform PH staff, who will initiate eviction proceedings
  - Whether the household is meeting the financial counseling requirement
  - Household cohorts
  - New strategies employed as part of the Individual Plan development (for example, it was discussed that the goals should be focused on how much money it will take for the household to be able to pay flat rent by their 5th year)
  - Hardship tracking process, including all hardships requested
  - Improve methods to ensure families are complying with the rules of the pilot (including retaining employment throughout)
  - Develop a procedure for households moving to section 8

### **3. Metrics and Data Sources**

For the most part, the metrics of this activity remain the same as the pilot activity. The most significant change is the proposal to track metrics by annual cohorts. Each year, a new cohort will be added to the tracking table below, allowing for comparisons between groups that started in different years. . These cohorts will be tracked as SAHA metrics, in addition to the HUD Standard Metrics that establish annual, activity-wide benchmarks and outcomes.

One metric is proposed to be removed: the SAHA metric for “Average Years of participation”. Staff felt that this figure provided little information is programmatically useful, and that the other metrics being tracked provided better feedback regarding program performance.

#### **I. FY2017 Update**

This activity did not experience any significant changes during this Plan year. This activity received HUD approval in December 2016. SAHA plans to implement by the end of FY2017.

#### **II. FY2018 Expectation**

This activity received HUD approval in December 2016. SAHA has spent FY2017 working with the community partner and preparing for implementation. SAHA plans to fully implement by the end of FY2017. SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks.

#### **III. HUD Standard Metrics**

<i><b>CE #4: Increase in Resources Leveraged</b></i>
--

Unit of Measurement	Baseline	Benchmark
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).
	\$0.00	XXX

<b>SS #1: Increase in Household Income</b>		
Unit of Measurement	Baseline	Benchmark
Average income of participating households (Average earned income of households affected by this policy in dollars).	<b>\$12,500:</b> Median earned income of households rolling over from pilot program	\$4700 annual increment leading to target established by Income Report analysis of median household income at time of self-sufficiency exit (\$36,000)
		\$17,200

<b>SS #3: Increase in Positive Outcomes in Employment Status</b>		
<i>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.</i>		
Unit of Measurement	Baseline	Benchmark
) Other (Heads and co-heads with any Earned Income)	Number of heads of households and co-heads with earned income prior to implementation of activity.	Expected number of heads or co-heads with earned income after implementation of the activity.
(6) Other (Heads and co-heads with any Earned Income)	Percentage of total work-able households with heads or co-heads with earned income prior to implementation of activity.	Expected percentage of total work-able households with heads or co-heads with earned income after implementation of the activity.

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	0	0

<b>SS #5: Households Assisted by Services that Increase Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of qualified households referred by partners and accepted by SAHA to participate (Number of households receiving services aimed to increase self-sufficiency )	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).
	23 (# of households continuing from pilot)	100 (up to 200 households will participate at a time; participation will ramp up to 200 by year 2)

<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$283.17	\$283.17

<b>SS #7: Increase in Agency Rental Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$160.92	\$160.92

<b>SS #8: Households Transitioned to Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households transitioned to self sufficiency	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).

	0	1
--	---	---

<b>HC #3: Decrease in Wait List Time</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average applicant time on wait list in months (decrease).	Average applicant time on wait list prior to implementation of the activity (in months).	Expected average applicant time on wait list after implementation of the activity (in months).
	12 months	2 months

#### IV. SAHA Metrics

<b>Increase in Household Income, by cohort</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average income of participating households (Average earned income of households affected by this policy in dollars (Cohort 1)).	<b>\$12,500:</b> Median earned income of households rolling over from pilot program	\$4700 annual increment leading to target established by Income Report analysis of median household income at time of self-sufficiency exit (\$36,000)
		\$17,200

<b>Increase in Positive Outcomes in Employment Status, by cohort</b>		
<i>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.</i>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
<b>(6) Other (Heads and co-heads with any Earned Income)</b>	Number of heads of households and co-heads with earned income prior to implementation of activity.(Cohort 1)	Expected number of heads or co-heads with earned income after implementation of the activity.
		18
<b>(6) Other (Heads and co-heads with any Earned Income)</b>	Percentage of total work-able households with heads or co-heads with earned income prior to implementation of activity. (Cohort 1)	Expected percentage of total work-able households with heads or co-heads with earned income after implementation of the activity.
	75% (18 out of 23)	100%

<b><i>Households Assisted by Services that Increase Self Sufficiency, by cohort</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of qualified households referred by partners and accepted by SAHA to participate (Number of households receiving services aimed to increase self-sufficiency (Cohort 1) )	23 (# of households continuing from pilot)	100 (up to 200 households will participate at a time; participation will ramp up to 200 by year 2)

<b><i>Households Transitioned to Self Sufficiency, by cohort</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households transitioned to self sufficiency (Cohort 1).	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).
	0	1

<b><i>Hardship Rate</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Rate of hardship requests. All types of hardships are counted, including but not limited to requests at the end of the five-year term.	0	0.05



## **16. FY2017-2: Restorative Housing Pilot Program**

This activity is designed to achieve the MTW statutory objective to give incentives that promote self-sufficiency, through resident services initiatives that provide eligible probationers and their families a public housing preference. This activity identifies a population of underserved residents – probationers – who currently face challenges securing stable housing. By providing a public housing preference, these households can more quickly establish a solid foundation from which to undertake subsequent reintegration and self-sufficiency goals

This activity is a two-year pilot program that will allow for up to 50 adult probationers who are reporting as part of the “Resurgence Collaborative” reentry initiative to have preference for housing on SAHA public housing properties. Probationers will be selected for application into the pilot by the Bexar County Community Supervision and Corrections Department (CSCD). Probationers in the pilot will receive dual case management support from the SAHA FSS Program and their Community Supervision Officer (CSO). The two-year term of the pilot program does not restrict how long residents will be able to continue to receive housing assistance.

The total number of households to be served under this activity is currently capped at 50. Over 20,000 households are currently on the public housing waitlist. Providing probationers and their households with housing assistance will have a very limited impact on other households currently on the waitlist.

Households will typically use the conventional public housing rent structure and biennial recertification schedule (per MTW Activity FY2014-4). However, both structure and schedule will be affected by the requirements of the self-sufficiency program selected by the household. For example, those enrolled in FSS will make use of an escrow account. Those in Jobs-Plus will have the option to establish an Earned Income Disregard (EID). For households living in Cassiano, the new Cassiano Jobs-Plus program will require an EID.

### **1. Target Population**

Bexar County CSCD will select eligible probationers for the pilot based on the Texas Risk Assessment System (TRAS) in order to identify probationers with high housing “needs” and a relatively low risk of reoffending. Probationers identified with a high housing need and low risk will be screened by their CSO for SAHA’s income requirements and disability status to determine their eligibility for SAHA assistance. If the probationer meets SAHA’s income requirements they will be offered to apply for the Pilot via the Referral Form. The probationer’s total criminal history will be taken into account for these risk assessments.

### **2. Criminal History Review**

Probationers will be selected for application to the pilot by the Bexar County Community Supervision and Corrections. Only Bexar County adult probationers currently serving a probation sentence for an allowable offense (Class B misdemeanor, nonviolent Class A misdemeanor, lowest-level controlled substance possession offense, or a first-time burglary offense) will be eligible for the pilot program. Probationers concurrently serving three or more separate probation sentences for allowable offenses or a single probation term for three or more allowable offenses

will be ineligible for the Pilot. An exemption to current SAHA Screening and Eviction Guidelines will be required to allow some participants in the Pilot population to avoid automatic denial.

Probationers with a criminal history that includes narcotics distribution, violent felonies, or multiple burglary offenses at any time will be ineligible. Probationers with any allowable offenses within the past five years for which they are not currently serving a probation sentence for will also be ineligible unless the probationer successfully completed a probation sentence(s) for the offense(s) in question. Federal bans on sex offenders and persons convicted of drug manufacturing on federal property remain. In addition, people previously evicted from federally-assisted housing or who have committed crimes on SAHA property in the past will be ineligible for the Pilot.

### **3. Dual Case Management**

Probationers selected for the pilot will be dual-case managed by a SAHA FSS Case Worker and their CSO. FSS will attempt to use only one or two case managers for the Pilot population as will the Bexar County CSCD. Selected probationers must be willing to engage in FSS case management for up to 5 years and if they unilaterally terminate case management they may be evicted. Selected probationers in the Pilot will receive a FSS case manager upon entering public housing, and the FSS case manager's role will be to supervise and motivate clients in conjunction with the CSO. Bexar County CSOs will have the final say on what court-ordered services must be completed and in what order, though the FSS case manager and CSO should coordinate and jointly agree on non-court ordered services and supervision. Selected probationers will be required to report to a CSO at the Barbara Jordan Center location in order to utilize services at the Resurgence Collaborative.

The SAHA FSS Case Manager would work to be present and present materials at SAHA-based hearings related to a Pilot participant; the Bexar County CSO would handle criminal and court-related matters pertaining to offenses probationers in the Pilot may commit. Both case managers should coordinate efforts and meet on at least a monthly basis to review problem cases and problem-solve.

The FSS Case Managers will also coordinate with property managers to address problems as needed. Scheduled meetings with clients do not have to be attended by both managers but efforts and communication should be coordinated so as not to confuse or mislead clients. SAHA will track the results of this Pilot with Bexar County CSCD through the FSS program.

### **4. Pilot Requirements**

The probationers must also stay in good standing with their probation requirements (including substance monitoring and home inspections). Probationers rearrested for violations of their current probation or new criminal offenses may be swiftly evicted from public housing and removed from the lease if determined by their CSO and SAHA. Family members would not be subjected to eviction if another adult in the household is capable of taking over the lease, unless otherwise determined by SAHA and the Bexar County CSCD.

Pilot Probationers who must go to residential drug treatment will not forfeit their public housing unit provided they have other immediate family members already living in the unit and capable of

maintaining the lease. Probationers exiting residential drug treatment would still be able to apply to the pilot, if all other eligibility requirements being met. An MOU will be created for the Pilot to share information between SAHA and the Bexar County CSCD. In addition to the MOU the participating probationers will be required to sign a release of information form in order for the CSCD to share any of case specific information (i.e. drug tests) with the SAHA case manager.

Probationers who are evicted due to an arrest or violation will be ineligible to apply for the Pilot in the future. Evicted probationers' spots in the Pilot will be recycled into the population cap for each pilot program. The same will apply for those probationers who leave public housing either voluntarily or through increased self-sufficiency. Individuals who finish their probation requirements may still be required to meet with a FSS case manager, and their spot will be recycled into the Pilot population cap.

Probationers will be required to obtain services at the "Resurgence Collaborative" at the Barbara Jordan Center determined by their FSS case manager and CSO. Services not provided at the Resurgence Collaborative may be completed through FSS/Probation's existing network of services providers. In addition, the FSS case manager will work to engage family members in services offered at the Resurgence Collaborative to build self-sufficiency in the entire family.

## **5. Pilot Logistics**

Up to 50 probationers reporting as part of the "Resurgence Collaborative" reentry initiative and their immediate families will be allowed prioritized access to public housing at SAHA properties over a two-year period. The population cap of 50 will include both probationers coming into new public housing units with their families and probationers who are being allowed to move in with immediate family members that are already living in public housing properties.

Probationers selected for the Pilot will be given a signed referral from their CSO to present to SAHA staff at the Unified Application Center. The Referral Form will be created specifically for this Pilot and will be based on similar referrals for other SAHA special populations/projects. If probationers apply to the Pilot and their term of probation expires before a spot in the Pilot becomes open, their Referral will expire and they will have to reapply to obtain SAHA housing assistance. Probationers who commit a crime after being accepted into the Pilot but before moving into their unit will be removed from the Pilot.

## **6. Outcomes**

According to 2012 Byrne CJI Grant Implementation Plan Data collected by Trinity University, the Choice Neighborhood footprint (location of the Resurgence Collaborative), offenders in the footprint have higher rates of recidivism (re-arrests) and a higher arrest rate. The number of people per ZIP code on probation in the footprint is twice that compared to other ZIP codes in Bexar County. Additionally 52% of probationers who live in these ZIP codes had their probation revoked instead of completed, compared to 41% for Bexar County as a whole. Focus groups conducted by Trinity University with probationers also found that transportation is one of the most significant barriers for probationers. Together this baseline data illustrates that the Choice Neighborhood has a higher percentage of probationers, these probationers struggle with basic

needs such as transportation, and these probationers have their probation revoked or re-offend at a greater rate than Bexar County as a whole.

The program is anticipated to reduce recidivism among probationers. The prioritized access to housing in the Pilot will also allow SAHA to determine the effect of immediate housing on probationers in regards to such measures.

### I. FY2017 Update

This activity did not experience any significant changes during this Plan year. This activity received HUD approval in December 2016. SAHA plans to implement by the end of FY2017.

### II. FY2018 Expectations

SAHA does not anticipate any significant or non-significant changes to this activity in the Plan year, nor to metrics, baselines, or benchmarks.

### III. HUD Standard Metrics

<b><i>CE #4: Increase in Resources Leveraged</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).
	\$0.00	\$6,475

<b><i>SS #1: Increase in Household Income</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	Baseline will be established as clients are admitted into the program	5% Increase

<b><i>SS #3: Increase in Positive Outcomes in Employment Status</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
(1) Employed Full- Time	Baseline will be established as clients are admitted into the program	5% Increase

(2) Employed Part- Time	Baseline will be established as clients are admitted into the program	5% Increase
(3) Enrolled in an Educational Program	Baseline will be established as clients are admitted into the program	5% Increase
(4) Enrolled in Job Training Program	Baseline will be established as clients are admitted into the program	5% Increase
(5) Unemployed	Baseline will be established as clients are admitted into the program	5% Increase

<b>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	0	0

<b>SS #5: Households Assisted by Services that Increase Self Sufficiency</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households assisted by services	Households receiving self sufficiency services prior to implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).
	0	50

<b>SS #6: Reducing Per Unit Subsidy Costs for Participating Households</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$283.17	\$283.17

<b>SS #7: Increase in Agency Rental Revenue</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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).
	\$160.92	\$160.92

<b>SS #8: Households Transitioned to Self Sufficiency</b>
---

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Number of households transitioned to self sufficiency.	Households transitioned to self sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency after implementation of the activity (number).
	0	0 (no transitions expected in first year of 2-year pilot program)

<b>HC #3: Decrease in Wait List Time</b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Average applicant time on wait list in months (decrease).	Average applicant time on wait list prior to implementation of the activity (in months).	Expected average applicant time on wait list after implementation of the activity (in months).
	12 months	2 months

#### **IV. SAHA Metrics**

<b><i>Revocation Rate</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
Percentage of revocations (probationers with probation revoked)	52% (average from sample)	41% or less (average for target zip codes)

### **C. Activities On Hold**

None.

### **D. Closed Out Activities**

#### **FY2011-1 Block grant funding with full flexibility**

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. In the FY2013-2014 Plan, the activity was been closed out due to its reference to the MTW Single Fund Flexibility, and not to any additional waivers.

#### **FY2011-1a Promote Education through Partnerships**

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. In the FY2013-2014 Plan, the activity was been closed out because it uses only the MTW Single Fund Flexibility, and no additional waivers.

#### **FY2011-1b Pilot Child Care Program**

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. 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. This activity was closed out in FY2011-2012.

#### **FY2011-1c Holistic Case Management**

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. In the FY2013-2014 Plan, the activity was been closed out because it uses only the MTW Single Fund Flexibility, and no additional waivers.

#### **FY2011-1d Resident Ambassador Program**

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. In the FY2013-2014 Plan, the activity was been closed out because it uses only the MTW Single Fund Flexibility, and no additional waivers.

#### **FY2011-2 Simplify and streamline HUD approval process for the development, redevelopment, and acquisition of Public Housing**

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. In the FY2013-2014 Plan, the activity was been closed out because faster transaction times have reduced the need for this activity.

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

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity has been closed out because was replaced by new activities FY2014-4 and FY2014-5.

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

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity has been closed out because it was replaced by new activity FY2014-1.

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

This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity has been closed out because it was replaced by new activity FY2014-1.

**FY2011-6 Commitment of project-based vouchers (PBV) to SAHA-owned or controlled units with expiring subsidies (HCV)**

This activity was designed to increase housing choices, and was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity is proposed to be closed out because it will be superseded by FY2015-3 upon approval of this MTW Plan.

**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**

This activity was designed to increase housing choices, and was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity is closed out because it has been superseded by FY2015-3.

**FY2011-8 Revise mobility rules for PBV**

This activity was designed to increase cost efficiency, and was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity is proposed to be closed out because it will be superseded by FY2015-3 upon approval of this MTW Plan.

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

This activity was originally approved as part of the FY2011-2012 MTW Plan and implemented in that fiscal year. The activity has been closed out because it was replaced by FY2014-4.

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

This activity was originally approved as part of the FY2011-2012 MTW Plan was closed out before implementation due to discussions with HUD about RAD option.

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

This activity was designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY2013-2014 MTW Plan and implemented in that fiscal year. This activity was closed out as of FY2016, due to staff analysis finding that it was no longer needed.



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

This activity was designed to increase housing choices and promote self-sufficiency, and was originally approved as part of the FY2012-2013 MTW Plan. Implementation started in FY2014. This pilot activity is proposed to be closed out as of FY2017 and upon approval of this plan. Staff analysis of the pilot identified process improvements that will be implemented in a new MTW Activity proposed for FY2017. Pilot households will be transitioned into the new MTW Activity or the standard public housing program.

**FY2013-3 Standardize Section 8 and Public Housing Inspection Progress**

This activity was designed to unify Section 8 and Public Housing inspection standards. The intent was to raise lower standards to a higher, uniform level. It was anticipated that UPCS (Public Housing) would serve as model for most elements, but some were to be derived from HQS (Section 8). This activity has been on hold until now, 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. This activity was closed out as of FY2017.

## Section V. Sources and Uses of Funds

V.1.Plan.Sources and Uses of MTW Funds		
A. MTW Plan: Sources and Uses of MTW Funds		
Estimated Sources of MTW Funding for the Fiscal Year		
PHAs shall provide the estimated sources and amounts of MTW funding by FDS line item.		
Sources		
FDS Line Item	FDS Line Item Name	Dollar Amount
70500 (70300+70400)	Total Tenant Revenue	\$11,615,583
70600	HUD PHA Operating Grants	\$119,998,554
70610	Capital Grants	\$2,666,045
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	\$0
71100+72000	Interest Income	\$41,080
71600	Gain or Loss on Sale of Capital Assets	\$509,124
71200+71300+71310+71400+71500	Other Income	\$1,315,144
70000	Total Revenue	\$136,145,530
Estimated Uses of MTW Funding for the Fiscal Year		
PHAs shall provide the estimated uses and amounts of MTW spending by FDS line item.		
Uses		
FDS Line Item	FDS Line Item Name	Dollar Amount
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating - Administrative	\$16,592,204

91300+91310+92000	Management Fee Expense	\$7,665,578
91810	Allocated Overhead	\$0
92500 (92100+92200+92300+92400)	Total Tenant Services	\$857,073
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	\$4,639,498
93500+93700	Labor	\$0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	\$12,020,924
95000 (95100+95200+95300+95500)	Total Protective Services	\$437,653
96100 (96110+96120+96130+96140)	Total insurance Premiums	\$1,809,262
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	\$1,765,034
96700 (96710+96720+96730)	Total Interest Expense and Amortization Cost	\$709,640
97100+97200	Total Extraordinary Maintenance	\$0
97300+97350	Housing Assistance Payments + HAP Portability-In	\$87,367,804
97400	Depreciation Expense	\$10,874,323
97500+97600+97700+97800	All Other Expenses	\$0
90000	<b>Total Operating (900) Expenses</b>	<b>\$144,739,193</b>

Note: Total expenses are greater than sources -- \$2.9 million dollars of expenses included in the uses section of the schedule will be paid with MTW funds currently being held by HUD. Additionally, FDS line item 97400, Depreciation, is a non-cash expense which does not require any cash outlay.

- Per Board Resolution 5724 (June 1, 2017), SAHA Moving-to-Work (MTW) funds are obligated consistent with the MTW Plan for the following:

- 1) Section 8 funding shortfall: \$1,400,000.00

- 2) Choice implementation matching grant for Wheatley Courts transformation: \$5,000,000.00
  - 3) Development of Chavez Multi-family Property: \$8,500,000.00
  - 4) Capital Planning - \$400,000.00
  - 5) Funding for the Rehabilitation of Victoria Plaza - \$10,000,000.00
  - 6) Additional Funding for East Meadows Development - \$600,000.00
  - 7) Preservation and expansion of affordable and public housing - \$7,200,000.00
  - 8) Program administration and implementation of MTW initiatives - \$1,100,000.00
- Activities that Will Use Only MTW Single Fund Flexibility

### **A. Education Partnerships**

SAHA's education-related programming is significant and diverse, and includes:

- 2) REACH Awards: recognize and reward nearly 300 students annually for academic achievement
- 3) College Scholarship Program: funds scholarships for up to 50 students annually to provide much needed support to ensure higher educational achievement
- 4) Education Summit: provides up to 900 residents annually with access to education and college resources, financial literacy, and other self-help resources

### **B. Resident Ambassador Empowerment Program**

The Resident Ambassador Program employs 16 residents throughout the year, providing 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.

### **C. Summer Youth Program**

The Summer Youth Employment Program employs up to 80 resident youth each year, providing work experience and capacity development such as resume writing, banking/financial literacy, interview skills, conflict resolution and other life and workforce development soft skills.

### **D. Health and Wellness**

SAHA sponsors a variety of events to promote health and wellness, including:

- Golden Gala: much-loved annual event for up to 1,000 elderly and disabled residents
- H2A (Healthy Habits Active) Living Awards: highlight resident involvement and engagement in civic engagement, health, and other quality of life activities
- Annual Father's Day initiative: engages up to 500 families in positive family activities and recognize fathers' contributions through "El Hombre Noble" awards

### **E. Choice Neighborhoods Initiative**

San Antonio's Eastside features a unique history, valued institutions, established churches, small businesses, and a core group of dedicated and loyal residents. The San Antonio Housing

Authority (SAHA) is in year 4 of utilizing the \$30 million EastPoint Choice Neighborhoods Initiative grant from the Dept. of Housing and Urban Development (HUD), to transform the Wheatley Courts area into a “community of choice” -- a safe, healthy, vibrant, thriving community for children, families and seniors.

The Choice Neighborhood Initiative invests in People, Housing and Neighborhood through transforming distressed neighborhoods into viable and sustainable mixed-income neighborhoods by linking housing and infrastructure improvements with much-needed services, such as quality schools, healthcare, transportation, and access to jobs.

The **People** outcomes focus on families’ health, education, safety, and employment, through efforts to encourage and support self-sufficiency and job readiness, and to facilitate access to early childhood and adult education. The **Housing** plan is to redevelop Wheatley Courts into a 414-unit energy efficient, mixed-income community, and to expand the supply of quality housing with 208 new housing units at The Park at Sutton Oaks. The **Neighborhood** component includes six strategies designed to complement the energy of the East Meadows site, by investing resources to create a safe, pedestrian-oriented neighborhood, with homeownership and rehab opportunities; a plan to grow business and retail opportunities; the repurposing of vacant lots; and to promote neighborhood beautification.

The key Choice partners include the City of San Antonio (CoSA), McCormack Baron Salazar, Inc., Urban Strategies, Inc., United Way of San Antonio and Bexar County (Eastside Promise Neighborhood), Merced Housing, San Antonio Independent School District (SAISD), St. Philip’s College, VIA, San Antonio for Growth on the Eastside (SAGE), and Resurgence Collaborative Partners.

San Antonio is the only community in the nation to receive a Promise Zone designation, as well as all three of the White House Neighborhood Revitalization Initiative grants, which, in addition to Choice, includes a \$23.7 million grant from the Dept. of Education to bolster children’s educational achievement and foster community development, and two Byrne Criminal Justice grants, totaling nearly \$1 million, to improve safety and security in the neighborhood.

#### **A. People**

The outcomes for Wheatley Courts residents have been achieved by our People Lead, Urban Strategies, Inc. through the comprehensive, on-site case management that facilitates access to quality early childhood education, after-school programs and adult education, as well as improved employment opportunities, with a particular emphasis on expanding job readiness, training and placement programs. The initial assessments indicated that only 12% of Wheatley residents have attended college or received a college degree, 49% have a high school diploma or GED, 39% have no high school diploma or GED, and 51% were unemployed. Through September 2018, Urban Strategies, will continue to work with our Wheatley households to remove education and

employment barriers, connect residents with health services and other needed services, and assist families as they return to East Meadows I.

**Access to Healthcare** is a primary concern for the Choice area. In partnership with SAHA and Urban Strategies, the San Antonio Metropolitan Health Department (SAMHD) conducted a Health Impact Assessment (HIA), which resulted in three key recommendations. The first recommendation was to increase access to health care. To meet this need, SAHA has executed an agreement to partner with the University Health System (UHS) to build a new health clinic in the Choice footprint. In addition, University of the Incarnate Word (UIW) is providing healthcare services, to include dental and mental health counseling for residents who were impacted by the Medicaid expansion gap.

### **B. Housing**

The Housing plan to develop a total of 622 high-quality, energy-efficient, mixed-income units is being implemented in four phases. Phase I includes 208 units at The Park at Sutton Oaks, which is now complete. Phase II (East Meadows I) includes 215 units for families, and is planned to be completed May 2017. In October 2017 the construction began for Phase III (Wheatley Park Senior Living), which features 80 units for seniors and is planned to be completed December 2017. Construction for the final and fourth phase (East Meadows II), which includes 119 units for families, will begin March 2018 and is scheduled to be completed by December 2019. The housing development and related infrastructure improvements will be funded through public-private partnerships, featuring a combination of federal, state, and city funding, as well as private equity.

### **C. Neighborhood**

**Safety and Security**, the leading concern of residents in this community, is being addressed through a Byrne Criminal Justice Innovation [BCJI] grant awarded in 2011. An initial research survey indicated: twice as many crimes committed in the footprint vs. County or City; twice as many residents on probation vs. County or City; and a higher level of violent and drug crime. The BCJI grant allowed SAHA to work closely with the community and a local academic institution (Trinity University) to identify root causes of crime within the Choice footprint. SAHA and the community developed strategies based on data and best practices, which include:

- **Resurgence Collaborative** - the first comprehensive re-entry program in Texas with community-based network providers co-located with Probation Field Office directed solely for the Eastside Community in transition and their families.
- **Group Violence Intervention (GVI)** -the GVI model provides an evidence-based strategy for law enforcement, community members, and service providers to collaboratively decrease violent crime in a sustainable and community driven process.

- **Crime Prevention Through Environmental Design Efforts** - CPTED efforts worked to target crime indirectly, and long-term environmental improvements are important to ensuring crime reductions last.
- **Community Organizing and Resident Empowerment**- hosted BBQs and meetings with residents and businesses owners that engaged hundreds of residents.
- **Hot Spot Policing** - the BCJI team partnered with the San Antonio Police Department to implement “Drug Market Intervention” to bring swift and certain consequences to violent street drug dealers operating in “hot spot” areas, while giving a second opportunity/reentry services to those drug dealers who do not have violent or extensive criminal backgrounds.
- **Community Engagement Patrols**- the BCJI team partnered with the San Antonio Police Department to conduct community engagement patrols intended to build relationships with residents and businesses in hot spot areas

The BCJI grant was set to expire September 2016, but received an extension through March 2017. Some of the initiatives will continue after the grant expires, these include the Resurgence Collaborative and the Group Violence Intervention.

### **A Healthy Community**

A second recommendation from the MetroHealth Health Impact Assessment was to increase community amenities for physical activity. This need will be met by Bexar County and CoSA which has committed to building a linear park with exercise equipment along the walking path and a basketball court at one end of the park. The third recommendation from the HIA was to increase food security and access to fresh fruit and vegetables, as the Choice footprint is a food desert. To meet this need, Choice is collaborating with Neighborhood partners to establish an urban farm. To support walkability efforts, a beautification strategy which includes the planting of more than 200 trees and art along key pathways will occur.

**The Infill Housing and Rehabilitation Strategy** is a key component to address the pervasive neighborhood deterioration and is another strategy in the CCI plan. The strategy involves land acquisition and investment for new homes and owner-occupied home repair. This strategy will utilize a place-based approach by expanding homebuyer assistance and increasing opportunities for owner-occupied housing rehabilitation assistance.

**Economic Development** is a key component of the greater revitalization and long-term success of the Eastpoint community. An Economic Development Committee has developed a plan for the area, which includes: provide assistance to existing businesses; attract a diversity of new businesses; create a vibrant commercial corridor that accommodates business activity and supports local residents; re-brand the community's image to attract the interest of the greater San Antonio community; and promote income diversity. One strategy that aligns with this plan is the business Façade improvement component of the Critical Community Improvement (CCI) plan.

Through this strategy, Choice is partnering with San Antonio for Growth on the Eastside (SAGE) to fund at least 12 façade improvement grants for business in the Choice footprint.

**Good Samaritan Veterans Outreach and Transition Center (GSVOTC)**

As part of the Critical Community Improvements (CCI) Plan, an investment of \$600,000 will be made towards the rehab and redevelopment of this center. The project is a partnership between SAHA, the City of San Antonio and St. Philip’s College to renovate the historical Good Samaritan Hospital in the Choice footprint and repurpose the building's use for a veteran's and community outreach center. St. Philip’s College will serve as the operational partner for activities and services.

<b>V.2.Plan.Local Asset Management Plan</b>									
<b>B. MTW Plan: Local Asset Management Plan</b>									
Is the PHA allocating costs within statute?					Yes	or			
Is the PHA implementing a local asset management plan (LAMP)?						or	No		
If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and approved. The narrative shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.									
Has the PHA provided a LAMP in the appendix?						or	No		
n/a									



## **Section VI. 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. The beginning and end dates of when the Annual MTW Plan was made available for public review, the dates, locations of public hearings and total number of attendees for the draft Annual MTW Plan, (to ensure PHAs have met the requirements for public participation, HUD reserves the right to request additional information to verify PHAs have complied with all requirements as set forth in the Standard MTW Agreement);**

The 2018 MTW Plan was posted for public comment on February 14, 2017. The draft Plan was posted on SAHA's website, and two hard copies were printed out and placed in the two main lobbies of the Central Offices. The public comment period closed on March 30, 2017, prior to the April 6 regular board meeting when the Board of Commissioners considered action on the Plan.

A variety of opportunities were provided for public comment, including via email to [mtw@saha.org](mailto:mtw@saha.org), by mail to 818 S. Flores, and at a public hearing on March 16 during the Operations and Choice Neighborhood Committee meeting.

Meetings for housing choice voucher participants and landlords were held on March 21, 24, 28, and 30. Attendance across all meetings was approximately 74.

Briefing sessions were held at resident council meetings at public housing sites throughout the month of March, Attendance across all briefings was approximately over 200.

#### **Public Comments In Response to 2018 Administrative Plan Revision Summary:**

**Comment #1:** 6.3.A(c) Decreases- Comment: A payment standard amount should not be decreased if the decreased amount would prevent the program participant from using the Section 8 voucher in a higher opportunity area.

**SAHA Response:** SAHA's payment standards must be within 90% to 110% of the Fair Market Rents (FMRs) published annually by the U.S. Department of Housing and Urban Development. If HUD publishes a new FMR and SAHA's current payment standard is less than 90% of the new FMR, the payment standard must decrease.

The proposed policy change regarding payment standard decreases protects families from payment standard decreases that may result from the implementation of HUD's Small Area FMRs. In 2017, HUD will be publishing FMRs for each zip code in the Bexar County Metropolitan Area. The new Small Area FMRs will more accurately reflect the rental prices for

housing in each zip code. This means that payment standards are likely to increase in higher opportunity areas, and decrease in lower opportunity areas.

According to SAHA's proposed policy, when SAHA implements the new payment standards based on HUD's Small Area FMRs, a family who lives in a lower opportunity area will not see a decrease in their payment standard amount while they continue to reside in their current unit. Only when the family moves from their unit will the new payment standard amounts apply to them. SAHA is implementing its policy to prevent uprooting families from their current homes or forcing families to move to higher opportunity areas before they are ready to do so.

**Comment #2:** 6.3.D (I) (c) (ii) (B) MTW Simplified Utility Allowance Schedule- Comment: This should be changed to: The flat utility allowance should be the higher of (1) the flat utility allowance for the voucher size, or (2) the flat utility allowance amount for the unit size of the unit rented by the family. If the utility allowance is not sufficient for program Participants to pay their utility bills, the program participants would be at risk for eviction and possible termination of housing assistance.

**SAHA Response:** This policy has been proposed to comply with HUD regulation, which states the following: §982.517(d) *Use of utility allowance schedule*. The PHA must use the appropriate utility allowance for the lesser of the size of dwelling unit actually leased by the family or the family unit size as determined by the PHA subsidy standards.

**Comment #3:** 16.4.B (I) Designees- Comment: form HUD-92006, Supplement to Application for Federally Assisted Housing, gives applicants and program participants the option to designate a person or organization that the PHA may contact and the reasons they may be contacted. This section, 16.4.8(I) Designees. Should include language that states that if a program participant has completed a form HUD-92006 and has designated a person as a contact person for the program participant, SAHA will contact that designated person for certain matters as allowed by form HUD-92006.

**SAHA Response:** Language regarding contact persons provided on the HUD-92006 will be included in 16.4.A Overview.

**Comment #4:** 16.4.B (6) (e) Advocates-Comment: Delete the word loud. Add that mere disagreement or assertiveness does not constitute abusive, bullying, or belligerent behavior.

**SAHA Response:** The word "loud" will be deleted, as the prohibition of "abusive, bullying, or belligerent behavior" applies to offensively loud speech.

**Comment #5:** 16.4.C (3) (a) (iii) Advocates-Comment: The head of household's entire social security number should not be required. Only the last four numbers of the social security number should be required.

**SAHA Response:** SAHA will revise the proposed policy to require only the last four numbers of the Head of Household's Social Security Number.

**Comment #6:** 16.4.C (3) (a) (v) Advocates-Comment: Delete-head of household signature. The written authorization described at 16.4.C (3) (a) ((IV) is sufficient.

**SAHA Response:** SAHA maintains that the Head of Household signature is necessary to ensure proper authorization.

**Comment #7:** 16.4.C (3) (b) Advocates-Comment: Instead of 10 days, SAHA should respond within 7 calendar days. If a hearing is pending SAHA should reschedule the hearing to allow time for the advocacy organization to obtain the requested information and have an opportunity to review the requested information and documents.

**SAHA Response:** SAHA requires 10 business days to retrieve and review the requested records. In many cases, old records have been archived in SAHA's warehouse and it may take several days for staff to retrieve the records requested from the warehouse. Once the records have been retrieved, further time is needed to review the records along with the applicable regulations, policies, and state and local law. SAHA will continue to reschedule informal hearings as necessary and reasonable to accommodate advocates who will be representing the family in the informal hearing.

**Comment #8:** Great Changes.

**Comment #9:** This is a very good meeting. I like it. The explanation is well spoken. Thanks to all your help and efforts. God Bless You all. Have a great day.

**Comment #10:** Thank you. You are doing very good. Blessing to you.

**C. Description of any planned or ongoing PHA-directed evaluations of the demonstration for the overall MTW program or any specific MTW activities, if applicable**

Not yet applicable.

**D. The Annual Statement/Performance and Evaluation Report (HUD 50075.1) or subsequent form required by HUD for MTW and non-MTW Capital Fund grants for each grant that has unexpended amounts, including estimates for the Plan Year and all three parts of the report;**

See Appendix 2.

**Appendix 1: Resolutions and Certifications**

**SAN ANTONIO HOUSING AUTHORITY**  
**Resolution 5716**

**RESOLUTION 5716, AUTHORIZING THE PROPOSED 2017-2018 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 (ADMIN PLAN), CAPITAL FUND PROGRAM PLAN, AND FIVE-YEAR CAPITAL IMPROVEMENT AND DEVELOPMENT PLAN**

**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") must approve the 2017-2018 Moving-to-Work (MTW) Agency Plan for fiscal year 2017-2018, including the revised MTW Plan, Public Housing Admissions and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan (Admin Plan) and the Capital Fund Program; and

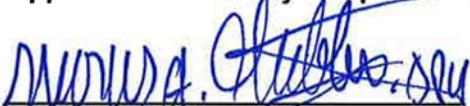
**WHEREAS**, the Board of Commissioners of the San Antonio Housing Authority also desires to authorize the submission of the 2017-2018 MTW Agency Plan to the U.S. Department of Housing and Urban Development (HUD); and

**WHEREAS**, the Board further 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 would hereby:

- 1) Approves Resolution 5716 authorizing the proposed 2017-2018 Moving-to-Work (MTW) Agency Plan, including revisions to the MTW Plan, the Public Housing Admissions and Continued Occupancy Plan (ACOP), the Housing Choice Voucher Administrative Plan (ADMIN PLAN), Capital Fund Program Plan, and five-year Capital Improvement and Development Plan; and
- 2) Authorizes the Chairman and President and CEO to execute and submit such certifications and other documents as necessary for the submission of the 2017-2018 MTW Plan to HUD.

**Approved the 6th day of April 2017.**



**Morris A. Stribling, D.P.M.**  
**Chair, Board of Commissioners**

**Attested and approved as to form:**



---

**David Nisivoccia**  
**President and CEO**

Form 50900: Elements for the Annual MTW Plan and Annual MTW Report

Attachment B

**Certifications of Compliance**

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, 2017, 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 PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) 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 certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1.
4. 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.
5. The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
6. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan.
7. The PHA will affirmatively further fair housing by examining its 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.
8. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
9. 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.
10. 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.
11. The PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
12. 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.

13. 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.
14. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105( a).
15. The PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.
16. 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.
17. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
18. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
19. 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).
20. 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.
21. 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)

David Nisivoccia  
Name of Authorized Official

President and CEO  
Title



3.30.17

Signature

Date

\*Must be signed by either the Chairman or Secretary of the Board of the PHA's legislative body. This certification cannot be signed by an employee unless authorized by the PHA Board to do so. If this document is not signed by the Chairman or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.

## Appendix 2: Annual Statement/Performance and Evaluation Report (HUD 50075.1) and Replacement Housing Factor (RHF) Plan - 2017/2018

The U.S. Department of Housing and Urban Development (HUD) issued Notice PIH-2016-21 (HA) on December 2, 2016. The notice “modifies the submission process for Capital Fund Program (CFP) 5-Year Action Plans (5YAPs) and Budgets (formerly referred to as Annual Statements). Public housing agencies (PHAs) with fiscal year ends (FYE) on or after March 31, 2017, will be required to submit their CFP 5-Year Action Plans and Budgets within HUD’s Energy Performance and Information Center (EPIC) system; the electronic CFP submission process will replace the current paper submission process.” The notice further details “PHAs that operate Public Housing programs, participate in the CFP, and currently participate in the Moving To Work (MTW) demonstration include a description of capital activities as part of the MTW Plan annual submission process, as required by their MTW Agreements.” SAHA’s CFP 5-Year Action Plan has been described further as part of this Section.

RHF-DDTF Grant Schedule As of February 13, 2017											Mixed Finance Closed 5/20/16 (Construction in Progress)	
Grant Year	Grant Number	Increment	OB End Date	EX End Date	Grant Amount	Pin Oak I, San Juan Add, SJ III, PHA Wide Various	Sutton II Park @ Sutton Oaks 208 / 49 PH Un	San Juan III 252 / 63 PH Un	Wheatley Relocation	Wheatley Site Prep	Wheatley Ph. I (CNI Ph. II) 215 / 71 PH Un	Wheatley Ph. II (CNI Ph. III) 80 / 48 PH Un
2006	TX59R006502-06	2nd	10/29/13	07/29/14	\$ 2,608,481		\$ 2,608,481.00					
2008	TX59R006502-08	2nd	10/29/13	10/29/15	\$ 2,593,345	\$ 2,046,361.43	\$ 209,083.10			\$ 337,900.47		
2009	TX59R006502-09	2nd	10/29/13	10/29/15	\$ 1,408,098			\$ 1,408,098.00				
2009	TX59R006504-09	2nd - Add'l	10/29/13	10/29/15	\$ 1,119,306			\$ 918,844.44		\$ 200,461.56		
2009	TX59R006501-09	1st	10/29/15	07/29/17	\$ 91,863					\$ 91,863.00		
2010	TX59R006502-10	2nd	10/29/13	10/29/15	\$ 1,810,724			\$ 1,718,182.56		\$ 92,541.44		
2010	TX59R006501-10	1st	10/29/15	10/29/17	\$ 360,291					\$ 360,291.00		
2011	TX59R006502-11	2nd	08/02/13	08/02/15	\$ 425,726			\$ 383,875.00		\$ 41,851.00		
2011	TX59R006501-11	1st	10/29/15	10/29/17	\$ 661,479					\$ 611,478.99	\$ 50,000.01	
2012	TX59R006502-12	2nd	03/11/14	03/11/16	\$ 76,939				\$ 76,939.00			
2012	TX59R006501-12	1st	10/29/15	10/29/17	\$ 520,769					\$ 98,369.47	\$ 422,399.53	
2013	TX59R006501-13	1st	09/08/15	09/08/17	\$ 549,153					\$ 549,153.00		
2013	TX59R006502-13	2nd	09/08/15	09/08/17	\$ 84,890					\$ 84,890.00		
2014	TX59R006501-14	1st	05/12/16	05/12/18	\$ 530,328					\$ 150,952.00	\$ 379,376.00	
2014	TX59R006502-14	2nd	05/12/16	05/12/18	\$ 79,058					\$ 9,509.29	\$ 69,548.71	
2015	TX59R006501-15	1st	04/12/17	04/12/19	\$ 321,414						\$ 96,545.75	\$ 224,868.25
2015	TX59R006502-15	2nd	04/12/17	04/12/19	\$ 80,032							\$ 80,032.00
2015	TX59P006501-15	DDTF	04/12/17	04/12/19	\$ 220,088							\$ 220,088.00
2016	TX59P006501-16	DDTF	04/12/18	04/12/20	\$ 832,561							\$ 832,561.00
2016	TX59R006502-16	2nd	04/12/18	04/12/20	\$ 80,606							\$ 80,606.00
						<b>\$ 2,046,361.43</b>	<b>\$ 2,817,564.10</b>	<b>\$ 4,429,000.00</b>	<b>\$ 76,939.00</b>	<b>\$ 2,629,261.22</b>	<b>\$ 1,017,870.00</b>	<b>\$ 1,438,155.25</b>
											10% Admin	\$143,816.25
											Residential Construction	\$1,294,339.00



**HUD 50075.1 FORMS**

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006502-16 Date of CFFP: N/A	FFY of Grant: 2016 RHF 2nd Increment FFY of Grant Approval: 20116
--	---	--

Line No.	Type of Grant Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Revised Annual Statement (revision no. )		Total Actual Cost <sup>1</sup>			
		Summary by Development Account	Reserve for Disasters/Emergencies Performance and Evaluation Report for Period Ending: 04/30/2017	X Final Performance and Evaluation Report	Total Estimated Costs	Obligated	Expended
1	Total Non-CFP Funds			Original	Revised <sup>2</sup>	Obligated	Expended
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>			0	0	0	0
3	1408 Management Improvements			0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)			0	0	0	0
5	1411 Audit			0	0	0	0
6	1415 Liquidated Damages			0	0	0	0
7	1430 Fees and Costs			0	0	0	0
8	1440 Site Acquisition			0	0	0	0
9	1450 Site Improvement			0	0	0	0
10	1460 Dwelling Structures			0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable			0	0	0	0
12	1470 Nondwelling Structures			0	0	0	0
13	1475 Nondwelling Equipment			0	0	0	0
14	1485 Demolition			0	0	0	0
15	1492 Moving To Work Demonstration			0	0	0	0
16	1495.1 Relocation Costs			0	0	0	0
17	1499 Development Activities <sup>4</sup>			80,606	80,606	80,606	80,606
18a	1501 Collateralization or Debt Service paid by the PHA			0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment			0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)			0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>			<b>80,606</b>	<b>80,606</b>	<b>80,606</b>	<b>80,606</b>
21	Amount of line 20 Related LBP Activities			0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance			0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs			0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs			0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures			0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>		Signature of Public Housing Director and Date:					

<sup>1</sup> To be completed for Performance and Evaluation Report  
<sup>2</sup> To be Completed for the Performance and Evaluation Report or a Revised Annual Statement  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
<sup>4</sup> RHF funds shall be included here.

Part I: Summary		FFY of Grant: 2015 RHF 2nd Increment
PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006502-15 Date of CFFP: N/A	FFY of Grant Approval: 2015

Line No	Type of Grant Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Revised Annual Statement (revision no: ) X Final Performance and Evaluation Report	Total Estimated Costs		Total Actual Cost <sup>1</sup>	
			Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFFP Funds	0	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)3	0	0	0	0	0
3	1408 Management Improvements	0	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)	0	0	0	0	0
5	1411 Audit	0	0	0	0	0
6	1415 Liquidated Damages	0	0	0	0	0
7	1430 Fees and Costs	0	0	0	0	0
8	1440 Site Acquisition	0	0	0	0	0
9	1450 Site Improvement	0	0	0	0	0
10	1450 Dwelling Structures	0	0	0	0	0
11	1465 1 Dwelling Equipment - Nonexpendable	0	0	0	0	0
12	1470 Nondwelling Structures	0	0	0	0	0
13	1475 Nondwelling Equipment	0	0	0	0	0
14	1485 Demolition	0	0	0	0	0
15	1492 Moving To Work Demonstration	0	0	0	0	0
16	1495 1 Relocation Costs	0	0	0	0	0
17	1499 Development Activities 4	80,032	80,032	80,032	80,032	80,032
18a	1501 Collateralization or Debt Service paid by the PHA	0	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)	0	0	0	0	0
20	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>80,032</b>	<b>80,032</b>	<b>80,032</b>	<b>80,032</b>	<b>80,032</b>
21	Amount of line 20 Related LBP Activities	0	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance	0	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs	0	0	0	0	0
24	Amount of line 20 Related to Security-Hand Costs	0	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures	0	0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>		Signature of Public Housing Director and Date:				

1 To be completed for Performance and Evaluation Report  
 2 To be completed for the Performance and Evaluation Report or a Revised Annual Statement  
 3 PHAs with under 250 units in management may use 100% of CFFP Grants for Operations  
 4 RHF Funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program: Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006502-14 Date of CFFP: N/A	FFY of Grant: 2014 RHF 2nd Increment FFY of Grant Approval: 2014
--	---	---

Line No.	Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Revised Annual Statement (revision no. )		Total Actual Cost <sup>1</sup>	
			Summary by Development Account	Reserve for Disasters/Emergencies X Final Performance and Evaluation Report	Obligated	Expended
1	Total Non-CFFP Funds		0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)3		0	0	0	0
3	1408 Management Improvements		0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)		0	0	0	0
5	1411 Audit		0	0	0	0
6	1415 Liquidated Damages		0	0	0	0
7	1430 Fees and Costs		0	0	0	0
8	1440 Site Acquisition		0	0	0	0
9	1450 Site Improvement		0	0	0	0
10	1460 Dwelling Structures		0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable		0	0	0	0
12	1470 Nondwelling Structures		0	0	0	0
13	1475 Nondwelling Equipment		0	0	0	0
14	1485 Demolition		0	0	0	0
15	1492 Moving To Work Demonstration		0	0	0	0
16	1495.1 Relocation Costs		0	0	0	0
17	1499 Development Activities 4		79,058	79,058	79,058	79,058
18a	1501 Collateralization or Debt Service paid by the PHA		0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment		0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)		0	0	0	0
20	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>		<b>79,058</b>	<b>79,058</b>	<b>79,058</b>	<b>79,058</b>
21	Amount of line 20 Related LBP Activities		0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance		0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs		0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs		0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures		0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>			Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report  
 2 To be completed for the Performance and Evaluation Report or a Revised Annual Statement  
 3 PHAs with under 250 units in management may use 100% of CFFP Grants for Operations.  
 4 RHF- Funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program: Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

Part I: Summary		Grant Type and Number	FFY of Grant: 2013 RHF 2nd Increment
PHA Name:	San Antonio Housing Authority	Capital Fund Program Grant No: N/A	FFY of Grant Approval: 2013
		Replacement Housing Factor Grant No: TX59R006502-13	
		Date of CFFP: N/A	

Line No.	Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending 04/30/2017	Reserve for Disasters/Emergencies X Final Performance and Evaluation Report	Revised Annual Statement (revision no. )		Total Actual Cost	
				Total Estimated Costs		Obligated	Expended
1	Total Non-CFFP Funds			0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)3			0	0	0	0
3	1408 Management Improvements			0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)			0	0	0	0
5	1411 Audit			0	0	0	0
6	1415 Liquidated Damages			0	0	0	0
7	1430 Fees and Costs			0	0	0	0
8	1440 Site Acquisition			0	0	0	0
9	1450 Site Improvement			0	0	0	0
10	1460 Dwelling Structures			0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable			0	0	0	0
12	1470 Nondwelling Structures			0	0	0	0
13	1475 Nondwelling Equipment			0	0	0	0
14	1485 Demolition			0	0	0	0
15	1492 Moving To Work Demonstration			0	0	0	0
16	1495.1 Relocation Costs			0	0	0	0
17	1499 Development Activities 4			84,890	84,890	84,890	84,890
18a	1501 Collateralization or Debt Service paid by the PHA			0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment			0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)			0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>			<b>84,890</b>	<b>84,890</b>	<b>84,890</b>	<b>84,890</b>
21	Amount of line 20 Related LBP Activities			0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance			0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs			0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs			0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures			0	0	0	0
Signature of Executive Director and Date: <b>David Nisivoccia, President and CEO</b>				Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report.  
 2 To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
 3 PHAs with under 250 units in management may use 100% of CFFP Grants for Operations.  
 4 RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program: Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

<b>Part I: Summary</b>		<b>Grant Type and Number</b>	FFY of Grant: 2012 RHF 2ND Increment
PHA Name:	San Antonio Housing Authority	Capital Fund Program Grant No: N/A	FFY of Grant Approval: 2012
		Replacement Housing Factor Grant No: TX59R006502-12	
		Date of CFPP: N/A	

Line No.	Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending 04/30/2017	Revised Annual Statement (revision no: )		Total Actual Cost			
			Reserve for Disasters/Emergencies Performance and Evaluation Report	X Final Performance and Evaluation Report	Total Estimated Costs	Total Actual Cost		
		Summary by Development Account			Original	Revised2	Obligated	Expended
1	Total Non-CFP Funds		0	0	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)3		0	0	0	0	0	0
3	1408 Management Improvements		0	0	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)		0	0	0	0	0	0
5	1411 Audit		0	0	0	0	0	0
6	1415 Liquidated Damages		0	0	0	0	0	0
7	1430 Fees and Costs		0	0	0	0	0	0
8	1440 Site Acquisition		0	0	0	0	0	0
9	1450 Site Improvement		0	0	0	0	0	0
10	1460 Dwelling Structures		0	0	0	0	0	0
11	1465 1 Dwelling Equipment - Nonexpendable		0	0	0	0	0	0
12	1470 Nondwelling Structures		0	0	0	0	0	0
13	1475 Nondwelling Equipment		0	0	0	0	0	0
14	1485 Demolition		0	0	0	0	0	0
15	1492 Moving To Work Demonstration		0	0	0	0	0	0
16	1495 1 Relocation Costs		0	0	0	0	0	0
17	1499 Development Activities 4		76,939	76,939	76,939	76,939	76,939	76,939
18a	1501 Collateralization or Debt Service paid by the PHA		0	0	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment		0	0	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)		0	0	0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>		<b>76,939</b>	<b>76,939</b>	<b>76,939</b>	<b>76,939</b>	<b>76,939</b>	<b>76,939</b>
21	Amount of line 20 Related LBP Activities		0	0	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance		0	0	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs		0	0	0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs		0	0	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures		0	0	0	0	0	0
Signature of Executive Director and Date: David Nisvoccia, President and CEO			Signature of Public Housing Director and Date:					

1 To be completed for Performance and Evaluation Report  
 2 To be completed for Performance and Evaluation Report or a Revised Annual Statement  
 3 PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
 4 RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006502-11 Date of CFFP: N/A	FFY of Grant: 2011 RHF 2nd Increment FFY of Grant Approval: 2011
--	---	---

Line No.	Type of Grant Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Reserve for Disasters/Emergencies Revised Annual Statement (revision no: ) X Final Performance and Evaluation Report	Total Estimated Costs		Total Actual Cost <sup>1</sup>	
			Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFF Funds		0	0	0	0
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>		0	0	0	0
3	1408 Management Improvements		0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)		0	0	0	0
5	1411 Audit		0	0	0	0
6	1415 Liquidated Damages		0	0	0	0
7	1430 Fees and Costs		0	0	0	0
8	1440 Site Acquisition		0	0	0	0
9	1450 Site Improvement		0	0	0	0
10	1460 Dwelling Structures		0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable		0	0	0	0
12	1470 Nondwelling Structures		0	0	0	0
13	1475 Nondwelling Equipment		0	0	0	0
14	1485 Demolition		0	0	0	0
15	1492 Moving To Work Demonstration		0	0	0	0
16	1495.1 Relocation Costs		0	0	0	0
17	1499 Development Activities 4		425,726	425,726	425,726	425,726
18a	1501 Collateralization or Debt Service paid by the PHA		0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment		0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)		0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>		<b>425,726</b>	<b>425,726</b>	<b>425,726</b>	<b>425,726</b>
21	Amount of line 20 Related LBP Activities		0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance		0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs		0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs		0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures		0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>			Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report.  
 2 To be Completed for the Performance and Evaluation Report for a Revised Annual Statement  
 3 PHAs with under 250 units in management may use 100% of CFFP Grants for Operations.  
 4 RHF Funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program: Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59P006502-10 Date of CFFP: N/A	FFY of Grant: 2010 RHF 2nd Increment FFY of Grant Approval: 2010
--	---	---

Line No.	Summary by Development Account	Original Annual Statement		Revised Annual Statement (revision no: )		Total Actual Cost <sup>1</sup>	
		Performance and Evaluation Report for Period Ending: 04/30/2017	Reserve for Disasters/Emergencies	X Final Performance and Evaluation Report		Obligated	Expended
1	Total Non-CFFP Funds	0	0	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)3	0	0	0	0	0	0
3	1408 Management Improvements	0	0	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)	0	0	0	0	0	0
5	1411 Audit	0	0	0	0	0	0
6	1415 Liquidated Damages	0	0	0	0	0	0
7	1430 Fees and Costs	0	0	0	0	0	0
8	1440 Site Acquisition	0	0	0	0	0	0
9	1450 Site Improvement	0	0	0	0	0	0
10	1460 Dwelling Structures	0	0	0	0	0	0
11	1465 1 Dwelling Equipment - Nonexpendable	0	0	0	0	0	0
12	1470 Nondwelling Structures	0	0	0	0	0	0
13	1475 Nondwelling Equipment	0	0	0	0	0	0
14	1485 Demolition	0	0	0	0	0	0
15	1492 Moving To Work Demonstration	0	0	0	0	0	0
16	1495 1 Relocation Costs	0	0	0	0	0	0
17	1499 Development Activities 4	1,810,724	1,810,724	1,810,724	1,810,724	1,810,724	1,810,724
18a	1501 Collateralization or Debt Service paid by the PHA	0	0	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)	0	0	0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>1,810,724</b>	<b>1,810,724</b>	<b>1,810,724</b>	<b>1,810,724</b>	<b>1,810,724</b>	<b>1,810,724</b>
21	Amount of line 20 Related LBP Activities	0	0	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance	0	0	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs	0	0	0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs	0	0	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures	0	0	0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>		Signature of Public Housing Director and Date:					

1 To be completed for Performance and Evaluation Report.  
 2 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
 3 PHAs with under 250 units in management may use 100% of CFFP Grants for Operations.  
 4 RHF funds shall be included here.



Part I: Summary					
PHA Name: San Antonio Housing Authority		Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006501-13 Date of CFFP: N/A		FFY of Grant: 2013 RHF 1st Increment FFY of Grant Approval: 2013	
Type of Grant Original Annual Statement                      Reserve for Disasters/Emergencies                      Revised Annual Statement (revision no: ) Performance and Evaluation Report for Period Ending: 09/08/15                      X Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFF Funds	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>	0	0	0	0
3	1408 Management Improvements	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)	0	0	0	0
5	1411 Audit	0	0	0	0
6	1415 Liquidated Damages	0	0	0	0
7	1430 Fees and Costs	0	0	0	0
8	1440 Site Acquisition	0	0	0	0
9	1450 Site Improvement	0	0	0	0
10	1460 Dwelling Structures	0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable	0	0	0	0
12	1470 Nondwelling Structures	0	0	0	0
13	1475 Nondwelling Equipment	0	0	0	0
14	1485 Demolition	0	0	0	0
15	1492 Moving To Work Demonstration	0	0	0	0
16	1495.1 Relocation Costs	0	0	0	0
17	1499 Development Activities <sup>4</sup>	549,153	549,153	549,153	549,153
18a	1501 Collateralization or Debt Service paid by the PHA	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)	0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>549,153</b>	<b>549,153</b>	<b>549,153</b>	<b>549,153</b>
21	Amount of line 20 Related LBP Activities	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs	0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures	0	0	0	0
Signature of Executive Director and Date: <b>David Nisivocchia, President and CEO</b>		Signature of Public Housing Director and Date:			

<sup>1</sup> To be completed for Performance and Evaluation Report.  
<sup>2</sup> To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFF Grants for Operations.  
<sup>4</sup> RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program: Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

<b>Part I: Summary</b>		<b>Grant Type and Number</b>	FFY of Grant: 2009 RHF 4TH Increment
PHA Name:	San Antonio Housing Authority	Capital Fund Program Grant No: N/A	FFY of Grant Approval: 2009
		Replacement Housing Factor Grant No: TX59R006504-09	
		Date of CFFP: N/A	

Line No.	Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Revised Annual Statement (revision no: )		Total Actual Cost <sup>1</sup>	
			Reserve for Disasters/Emergencies X Final Performance and Evaluation Report		Obligated	Expended
Summary by Development Account			Total Estimated Costs			
1	Total Non-CFP Funds		0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)3		0	0	0	0
3	1408 Management Improvements		0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)		0	0	0	0
5	1411 Audit		0	0	0	0
6	1415 Liquidated Damages		0	0	0	0
7	1430 Fees and Costs		0	0	0	0
8	1440 Site Acquisition		0	0	0	0
9	1450 Site Improvement		0	0	0	0
10	1460 Dwelling Structures		0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable		0	0	0	0
12	1470 Nondwelling Structures		0	0	0	0
13	1475 Nondwelling Equipment		0	0	0	0
14	1485 Demolition		0	0	0	0
15	1492 Moving To Work Demonstration		0	0	0	0
16	1495.1 Relocation Costs		0	0	0	0
17	1499 Development Activities 4		1,119,306	1,119,306	1,119,306	1,119,306
18a	1501 Collateralization or Debt Service paid by the PHA		0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment:		0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)		0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>		<b>1,119,306</b>	<b>1,119,306</b>	<b>1,119,306</b>	<b>1,119,306</b>
21	Amount of line 20 Related LBP Activities		0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance		0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs		0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs		0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures		0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>			Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report  
 2 To be completed for the Performance and Evaluation Report or a Revised Annual Statement  
 3 PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
 4 RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program: Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX39R006502-09 Date of CFFP: N/A	FFY of Grant: 2009 RHF 2nd Increment FFY of Grant Approval: 2009
--	---	---

Line No.	Type of Grant Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Reserve for Disasters/Emergencies Revised Annual Statement (revision no. ) X Final Performance and Evaluation Report	Total Estimated Costs		Total Actual Cost <sup>1</sup>	
			Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFFP Funds		0	0	0	0
2	1406 Operations (may not exceed 20% of line 20/3)		0	0	0	0
3	1408 Management Improvements		0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)		0	0	0	0
5	1411 Audit		0	0	0	0
6	1415 Liquidated Damages		0	0	0	0
7	1430 Fees and Costs		0	0	0	0
8	1440 Site Acquisition		0	0	0	0
9	1450 Site Improvement		0	0	0	0
10	1460 Dwelling Structures		0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable		0	0	0	0
12	1470 Nondwelling Structures		0	0	0	0
13	1475 Nondwelling Equipment		0	0	0	0
14	1485 Demolition		0	0	0	0
15	1492 Moving To Work Demonstration		0	0	0	0
16	1495.1 Relocation Costs		0	0	0	0
17	1499 Development Activities 4		1,408,098	1,408,098	1,408,098	1,408,098
18a	1501 Collateralization or Debt Service paid by the PHA		0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment		0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)		0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>		<b>1,408,098</b>	<b>1,408,098</b>	<b>1,408,098</b>	<b>1,408,098</b>
21	Amount of line 20 Related LBP Activities		0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance		0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs		0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs		0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures		0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>			Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report.  
 2 To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
 3 PHAs with under 250 units in management may use 100% of CFFP Grants for Operations.  
 4 RHF Funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

<b>Part I: Summary</b>		<b>Grant Type and Number</b>	<b>FFY of Grant: 2008 RHF 2nd Increment</b>
PHA Name:	San Antonio Housing Authority	Capital Fund Program Grant No: N/A	FFY of Grant Approval: 2008
		Replacement Housing Factor Grant No: TX59R00502-08	
		Date of CFFP: N/A	

Line No.	Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Revised Annual Statement (revision no. )		Total Actual Cost <sup>1</sup>	
			Reserve for Disasters/Emergencies X Final Performance and Evaluation Report	Final Performance and Evaluation Report	Obligated	Expended
Summary by Development Account			Total Estimated Costs			
1	Total Non-CFP Funds		0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)3		0	0	0	0
3	1408 Management Improvements		0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)		0	0	0	0
5	1411 Audit		0	0	0	0
6	1415 Liquidated Damages		0	0	0	0
7	1430 Fees and Costs		0	0	0	0
8	1440 Site Acquisition		0	0	0	0
9	1450 Site Improvement		0	0	0	0
10	1460 Dwelling Structures		0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable		0	0	0	0
12	1470 Nondwelling Structures		0	0	0	0
13	1475 Nondwelling Equipment		0	0	0	0
14	1485 Demolition		0	0	0	0
15	1492 Moving To Work Demonstration		0	0	0	0
16	1495.1 Relocation Costs		0	0	0	0
17	1499 Development Activities 4		2,593,345	2,593,345	2,593,345	2,593,345
18a	1501 Collateralization or Debt Service paid by the PHA		0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment		0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)		0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>		<b>2,593,345</b>	<b>2,593,345</b>	<b>2,593,345</b>	<b>2,593,345</b>
21	Amount of line 20 Related LBP Activities		0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance		0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs		0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs		0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures		0	0	0	0
Signature of Executive Director and Date: <b>David Nisvoccia, President and CEO</b>			Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report  
 2 To be completed for the Performance and Evaluation Report or a Revised Annual Statement  
 3 PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
 4 RHF Funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program: Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

<b>Part I: Summary</b>		<b>Grant Type and Number</b>	<b>FFY of Grant: 2006 RHF 2nd Increment</b>
PHA Name: San Antonio Housing Authority	Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006502-06 Date of CFFP: N/A	FFY of Grant: 2006 RHF 2nd Increment FFY of Grant Approval: 2006	

Line No.	Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Revised Annual Statement (revision no.: )		Total Actual Cost <sup>1</sup>	
			X Final Performance and Evaluation Report	Total Estimated Costs	Obligated	Expended
1	Total Non-CFFP Funds		0	0	0	0
2	1406 Operations (may not exceed 20% of line 20)		0	0	0	0
3	1408 Management Improvements		0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)		0	0	0	0
5	1411 Audit		0	0	0	0
6	1415 Liquidated Damages		0	0	0	0
7	1430 Fees and Costs		0	0	0	0
8	1440 Site Acquisition		0	0	0	0
9	1450 Site Improvement		0	0	0	0
10	1460 Dwelling Structures		0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable		0	0	0	0
12	1470 Nondwelling Structures		0	0	0	0
13	1475 Nondwelling Equipment		0	0	0	0
14	1485 Demolition		0	0	0	0
15	1492 Moving To Work Demonstration		0	0	0	0
16	1495.1 Relocation Costs		0	0	0	0
17	1499 Development Activities 4		2,608,481	2,608,481	2,608,481	2,608,481
18a	1501 Collateralization or Debt Service paid by the PHA		0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment		0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)		0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>		<b>2,608,481</b>	<b>2,608,481</b>	<b>2,608,481</b>	<b>2,608,481</b>
21	Amount of line 20 Related LBP Activities		0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance		0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs		0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs		0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures		0	0	0	0
Signature of Executive Director and Date: <b>David Nisvocca, President and CEO</b>			Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report.  
 2 To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
 3 PHAs with under 250 units in management may use 100% of CFFP Grants for Operations.  
 4 RHF Funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

<b>Part I: Summary</b>		<b>Grant Type and Number</b>		<b>FFY of Grant: 2015 RHF 1st Increment</b>	
PHA Name: San Antonio Housing Authority		Capital Fund Program Grant No: N/A		FFY of Grant Approval: 2015	
		Replacement Housing Factor Grant No: TXS9R006501-15			
		Date of CFFP: N/A			

Line No.	Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending: 04/30/2017	Reserve for Disasters/Emergencies	Revised Annual Statement (revision no: )			
				Original	Revised2	Obligated	Expended
		Summary by Development Account					
1		Total Non-CFP Funds	0	0	0	0	0
2		1406 Operations (may not exceed 20% of line 20)	0	0	0	0	0
3		1408 Management Improvements	0	0	0	0	0
4		1410 Administration (may not exceed 10% of line 20)	0	0	0	0	0
5		1411 Audit	0	0	0	0	0
6		1415 Liquidated Damages	0	0	0	0	0
7		1430 Fees and Costs	0	0	0	0	0
8		1440 Site Acquisition	0	0	0	0	0
9		1450 Site Improvement	0	0	0	0	0
10		1460 Dwelling Structures	0	0	0	0	0
11		1465.1 Dwelling Equipment - Nonexpendable	0	0	0	0	0
12		1470 Nondwelling Structures	0	0	0	0	0
13		1475 Nondwelling Equipment	0	0	0	0	0
14		1485 Demolition	0	0	0	0	0
15		1492 Moving To Work Demonstration	0	0	0	0	0
16		1495.1 Relocation Costs	0	0	0	0	0
17		1499 Development Activities 4	321,414	321,414	321,414	321,414	321,414
18a		1501 Collateralization or Debt Service paid by the PHA	0	0	0	0	0
18b		9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0	0
19		1502 Contingency (may not exceed 8% of line 20)	0	0	0	0	0
20		<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>321,414</b>	<b>321,414</b>	<b>321,414</b>	<b>321,414</b>	<b>321,414</b>
21		Amount of line 20 Related LBP Activities	0	0	0	0	0
22		Amount of line 20 Related to Section 504 Compliance	0	0	0	0	0
23		Amount of line 20 Related to Security-Soft Costs	0	0	0	0	0
24		Amount of line 20 Related to Security-Hard Costs	0	0	0	0	0
25		Amount of line 20 Related to Energy Conservation Measures	0	0	0	0	0
Signature of Executive Director and Date: David Misrocchia, President and CEO			Signature of Public Housing Director and Date:				

1 To be completed for Performance and Evaluation Report.  
 2 To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
 3 PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
 4 RHF funds shall be included here.

Part I: Summary					
PHA Name: San Antonio Housing Authority		Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006501-14 Date of CFFP: N/A		FFY of Grant: 2014 RHF 1st Increment FFY of Grant Approval: 2014	
Type of Grant Original Annual Statement                      Reserve for Disasters/Emergencies                      Revised Annual Statement (revision no: ) Performance and Evaluation Report for Period Ending: 04/30/2017                      X Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFP Funds	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>	0	0	0	0
3	1408 Management Improvements	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)	0	0	0	0
5	1411 Audit	0	0	0	0
6	1415 Liquidated Damages	0	0	0	0
7	1430 Fees and Costs	0	0	0	0
8	1440 Site Acquisition	0	0	0	0
9	1450 Site Improvement	0	0	0	0
10	1460 Dwelling Structures	0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable	0	0	0	0
12	1470 Nondwelling Structures	0	0	0	0
13	1475 Nondwelling Equipment	0	0	0	0
14	1485 Demolition	0	0	0	0
15	1492 Moving To Work Demonstration	0	0	0	0
16	1495.1 Relocation Costs	0	0	0	0
17	1499 Development Activities <sup>4</sup>		530,326	530,326	530,326
18a	1501 Collateralization or Debt Service paid by the PHA	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)	0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>530,326</b>	<b>530,326</b>	<b>530,326</b>	<b>530,326</b>
21	Amount of line 20 Related LBP Activities	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs	0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures	0	0	0	0
Signature of Executive Director and Date: <b>David Nisiovocchia, President and CEO</b>			Signature of Public Housing Director and Date:		

<sup>1</sup> To be completed for Performance and Evaluation Report.  
<sup>2</sup> To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
<sup>4</sup> RHF funds shall be included here.

Part I: Summary					
PHA Name: San Antonio Housing Authority		Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006501-12 Date of CFFP: N/A		FFY of Grant: 2012 RHF 1st Increment FFY of Grant Approval: 2012	
Type of Grant Original Annual Statement                      Reserve for Disasters/Emergencies                      Revised Annual Statement (revision no: ) Performance and Evaluation Report for Period Ending: 10/29/15                      X Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFP Funds	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>	0	0	0	0
3	1408 Management Improvements	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)	0	0	0	0
5	1411 Audit	0	0	0	0
6	1415 Liquidated Damages	0	0	0	0
7	1430 Fees and Costs	0	0	0	0
8	1440 Site Acquisition	0	0	0	0
9	1450 Site Improvement	0	0	0	0
10	1460 Dwelling Structures	0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable	0	0	0	0
12	1470 Nondwelling Structures	0	0	0	0
13	1475 Nondwelling Equipment	0	0	0	0
14	1485 Demolition	0	0	0	0
15	1492 Moving To Work Demonstration	0	0	0	0
16	1495.1 Relocation Costs	0	0	0	0
17	1499 Development Activities <sup>4</sup>	520,769	520,769	520,769	520,769
18a	1501 Collateralization or Debt Service paid by the PHA	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)	0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>520,769</b>	<b>520,769</b>	<b>520,769</b>	<b>520,769</b>
21	Amount of line 20 Related LBP Activities	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs	0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures	0	0	0	0
Signature of Executive Director and Date: <b>David Nisiovcia, President and CEO</b>		Signature of Public Housing Director and Date:			

1 To be completed for Performance and Evaluation Report.  
 2 To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
 3 PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
 4 RHF funds shall be included here.



Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006501-11 Date of CFFP: N/A	FFY of Grant: 2011 RHF 1st Increment FFY of Grant Approval: 2011
--	---	---

Line No.	Original Annual Statement Performance and Evaluation Report for Period Ending: 4/30/2017	Revised Annual Statement (revision no: )		Total Actual Cost <sup>1</sup>		
		Summary by Development Account	X Final Performance and Evaluation Report	Total Estimated Costs	Obligated	Expended
1	Total Non-CFP Funds			0	0	0
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>			0	0	0
3	1408 Management Improvements			0	0	0
4	1410 Administration (may not exceed 10% of line 20)			0	0	0
5	1411 Audit			0	0	0
6	1415 Liquidated Damages			0	0	0
7	1430 Fees and Costs			0	0	0
8	1440 Site Acquisition			0	0	0
9	1450 Site Improvement			0	0	0
10	1460 Dwelling Structures			0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable			0	0	0
12	1470 Nondwelling Structures			0	0	0
13	1475 Nondwelling Equipment			0	0	0
14	1485 Demolition			0	0	0
15	1492 Moving To Work Demonstration			0	0	0
16	1495.1 Relocation Costs			0	0	0
17	1499 Development Activities <sup>4</sup>			661,479	661,479	661,479
18a	1501 Collateralization or Debt Service paid by the PHA			0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment			0	0	0
19	1502 Contingency (may not exceed 8% of line 20)			0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>			<b>661,479</b>	<b>661,479</b>	<b>661,479</b>
21	Amount of line 20 Related LBP Activities			0	0	0
22	Amount of line 20 Related to Section 504 Compliance			0	0	0
23	Amount of line 20 Related to Security-Soft Costs			0	0	0
24	Amount of line 20 Related to Security-Hard Costs			0	0	0
25	Amount of line 20 Related to Energy Conservation Measures			0	0	0
Signature of Executive Director and Date: <b>David Nisivocia, President and CEO</b>		Signature of Public Housing Director and Date:				

<sup>1</sup> To be completed for Performance and Evaluation Report.  
<sup>2</sup> To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
<sup>4</sup> RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TX59R006501-10 Date of CFFP: N/A	FFY of Grant: 2010 RHF 1st Increment FFY of Grant Approval: 2010
--	---	---

Line No.	Original Annual Statement Performance and Evaluation Report for Period Ending: 4/30/2017	Revised Annual Statement (revision no. )		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFP Funds	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>	0	0	0	0
3	1408 Management Improvements	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)	0	0	0	0
5	1411 Audit	0	0	0	0
6	1415 Liquidated Damages	0	0	0	0
7	1430 Fees and Costs	0	0	0	0
8	1440 Site Acquisition	0	0	0	0
9	1450 Site Improvement	0	0	0	0
10	1460 Dwelling Structures	0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable	0	0	0	0
12	1470 Nondwelling Structures	0	0	0	0
13	1475 Nondwelling Equipment	0	0	0	0
14	1485 Demolition	0	0	0	0
15	1492 Moving To Work Demonstration	0	0	0	0
16	1495.1 Relocation Costs	0	0	0	0
17	1499 Development Activities <sup>4</sup>	360,291	360,291	360,291	360,291
18a	1501 Collateralization or Debt Service paid by the PHA	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)	0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>360,291</b>	<b>360,291</b>	<b>360,291</b>	<b>360,291</b>
21	Amount of line 20 Related LBP Activities	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs	0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures	0	0	0	0
Signature of Executive Director and Date: <b>David Nisivoccia, President and CEO</b>		Signature of Public Housing Director and Date:			

<sup>1</sup> To be completed for Performance and Evaluation Report.  
<sup>2</sup> To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
<sup>4</sup> RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

**Part I: Summary**

PHA Name: San Antonio Housing Authority	Grant Type and Number Capital Fund Program Grant No: N/A Replacement Housing Factor Grant No: TXS9R006501-09 Date of CFFP: N/A	FFY of Grant: 2009 RHF 1st Increment FFY of Grant Approval: 2009
--	---	---

Type of Grant	Original Annual Statement Performance and Evaluation Report for Period Ending: 4/30/2017	Revised Annual Statement (revision no: )		Total Actual Cost <sup>1</sup>	
		Reserve for Disasters/Emergences	X Final Performance and Evaluation Report	Obligated	Expended
Line No.	Summary by Development Account	Total Estimated Costs		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFP Funds	0	0	0	0
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>	0	0	0	0
3	1408 Management Improvements	0	0	0	0
4	1410 Administration (may not exceed 10% of line 20)	0	0	0	0
5	1411 Audit	0	0	0	0
6	1415 Liquidated Damages	0	0	0	0
7	1430 Fees and Costs	0	0	0	0
8	1440 Site Acquisition	0	0	0	0
9	1450 Site Improvement	0	0	0	0
10	1460 Dwelling Structures	0	0	0	0
11	1465.1 Dwelling Equipment - Nonexpendable	0	0	0	0
12	1470 Nondwelling Structures	0	0	0	0
13	1475 Nondwelling Equipment	0	0	0	0
14	1485 Demolition	0	0	0	0
15	1492 Moving To Work Demonstration	0	0	0	0
16	1495.1 Relocation Costs	0	0	0	0
17	1499 Development Activities <sup>4</sup>	91,863	91,863	91,863	91,863
18a	1501 Collateralization or Debt Service paid by the PHA	0	0	0	0
18b	9000 Collateralization or Debt Service paid Via System of Direct Payment	0	0	0	0
19	1502 Contingency (may not exceed 8% of line 20)	0	0	0	0
<b>20</b>	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>91,863</b>	<b>91,863</b>	<b>91,863</b>	<b>91,863</b>
21	Amount of line 20 Related LBP Activities	0	0	0	0
22	Amount of line 20 Related to Section 504 Compliance	0	0	0	0
23	Amount of line 20 Related to Security-Soft Costs	0	0	0	0
24	Amount of line 20 Related to Security-Hard Costs	0	0	0	0
25	Amount of line 20 Related to Energy Conservation Measures	0	0	0	0
Signature of Executive Director and Date: <b>David Nisivocda, President and CEO</b>		Signature of Public Housing Director and Date:			

<sup>1</sup> To be completed for Performance and Evaluation Report.  
<sup>2</sup> To be Completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for Operations.  
<sup>4</sup> RHF funds shall be included here.

## **Appendix 3: Preservation and Expansion of Affordable Housing Policy**

### **A. Purpose, Goals, Priority Guidelines of the Affordable Housing Preservation and Expansion Policy (P&E Policy)**

On May 12, 2011 the SAHA Board of Commissioners adopted the Affordable Housing Preservation and Expansion Policy (P&E Policy). The P&E Policy establishes SAHA's principles, goals, priorities and strategies to preserve and expand the supply of high quality, sustainable and affordable housing in San Antonio.

### **B. Purpose**

SAHA is committed to implementing a work plan to preserve and expand its affordable housing portfolio. In San Antonio, an estimated 200,000 households are eligible for some form of housing assistance. In order to address the demand for this housing, SAHA has prepared a work plan that reflects project priorities for both expansion and preservation to meet this demand. This has become increasingly important as SAHA's existing public housing portfolio is quite old, yet still a valuable source of affordable rental housing. In order to meet this demand a combination of preserving existing housing stock and adding to the affordable housing available to households in San Antonio has been developed. In addition, SAHA has commissioned a Capital Needs Assessment that will provide more detailed information on the capital improvement needs of its portfolio. The cost of needed property improvements exceeds the available resources; thus limited resources need to be used effectively and efficiently. To guide the use of limited funding, SAHA's Board of Commissioners has adopted policies that guide the work undertaken by staff in collaboration with a number of partners to effectively use limited resources, add value to the portfolio and guide decision making on property preservation, expansion, redevelopment, and disposition.

### **C. Goals**

- Goal One: To maintain existing levels of deeply subsidized housing and create new affordably priced housing through acquisition, new construction and rehabilitation of existing affordable housing.
- Goal Two: To increase the quality, value, marketability and energy efficiency of all properties in the SAHA portfolio.
- Goal Three: Actively pursue emerging development and redevelopment opportunities that meet multiple community goals, such as economic and transit oriented development, while adding to the affordable housing infrastructure for San Antonio.

Goal Four: To integrate economic development and supportive service initiatives that will support residents and the surrounding neighborhoods in existing properties as well as in new and redeveloping projects.

Goal Five: Increase housing choices and the availability of housing for special populations through supportive housing (e.g. youth aging out of foster care, homeless individuals and families etc.).

#### **D. Priority Guidelines**

SAHA has established a set of guidelines against which all properties are evaluated. These guidelines take into consideration the age and condition of the property, past property improvements and the amenities in the area, to include schools, shopping, transit and employment. In addition, projects located in areas where other community investment is being made or anticipated are given priority. These guidelines are applied to both preservation and expansion activities:

1. Properties that are in areas of opportunity and with average building conditions are deemed to be good candidates for additional capital investment. This is because investment today will prevent further deterioration of a property and will maintain or improve revenue generation for SAHA as well as enhance livability. In addition, SAHA will integrate capital improvements on several projects in order to make significant change in the livability, appearance and functionality of a development. In other words, substantial rehabilitation will be completed. The work plan also allows SAHA to undertake capital projects to address health and safety issues where a substantial rehabilitation is not needed.

2. New developments that are in locations where additional community investment is being made are a priority.

#### **E. Portfolio Evaluation Process**

In October 2013, at the direction of the President and CEO, an internal Physical Needs Assessment (PNA) Task Force was created, to develop a standardized, objective process to evaluate individual assets in the SAHA portfolio. On December 6, 2013, the Board of Commissioners was provided a presentation that summarized the results of the PNA, performed by Raba Kistner Associates, of SAHA's Public Housing and Beacon portfolios. The methodology was then utilized to identify and prioritize short-term and long-term initiatives to address items identified in the PNA, while incorporating the goals and objectives outlined in SAHA's Affordable Housing Preservation & Expansion Policy, as adopted by the Board on May 12, 2011.

#### **F. Asset Management Plan**

On July 8, 2016, the SAHA Board of Commissioners heard an update regarding a revisions to the five-year Asset Management Plan for the preservation and expansion of affordable housing. The

Asset Management Plan adds an implementation element to the previously adopted principles, policies, and goals. The Asset Management Plan represents staff's recommendation of the best use of limited financial resources while embracing the goals and objectives of SAHA's Affordable Housing Preservation & Expansion Policy, and includes the following three elements:

**G. Invest approximately \$30.0 million in capital repairs to extend the useful life of 1,793 Public Housing units located in 22 properties.**

Property Name Address	Elderly/ Family	# of Units	Year Built	Activity	Funding Source	Capital 5 Year Plan				
						FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Victoria Plaza 411 Barrera	E	185	1959	Comprehensive Modernization	MTW \$10,000,000 EPC \$1,307,000	11,307,000				
Various - Public Housing *	E/F	854	Various	Hail Damaged Roof Replacement	2016 CFP \$1,277,000 INS \$2,409,000	3,686,000				
PHA Wide Physical Needs Assessment				PNA/GPNA	2016 CFP	300,000				
Scattered Site 9354 Valley Gate	F	1	1986	Water damaged Unit	2016 CFP \$100,000 INS \$40,000	140,000				
Blanco Apartments 906 W. Huisache	E	100	1971	Basement-Structural Repairs	2016 CFP	282,000				
WC White 618 N. Hackberry	E	75	1976	Basement-Structural Repairs	2016 CFP	282,000				
Villa Tranchese 307 Marshall	E	201	1966	Sprinkler System Design	2016 CFP	150,000				
				HVAC Chiller Replacement	2016 CFP \$154,000 EPC \$70,000	224,000				
				Basement-Structural Repairs	2016 CFP	282,000				
				Sprinkler System Construction	2018 CFP		2,972,000			
Fair Avenue 1215 Fair	E	216	1971	Sprinkler System Design	2016 CFP	150,000				
				Basement-Structural Repairs	2016 CFP	282,000				
				Sprinkler System Construction	2017 CFP		2,972,000			
Le Chalet 832 East Grayson	E	34	1971	Substantial Renovation	2019 CFP			1,278,000		
Morris Beldon 7511 Harlow	F	35	1980	Substantial Renovation	2019 CFP			913,000		
Francis Furey 4902 Gus Eckert Ln	F	66	1988	Substantial Renovation	2019-2020 CFP			781,000	2,170,000	
Olive Park 1015 N. Olive	F	26	1975	Substantial Renovation	2020-2021 CFP				802,000	1,042,920
		1,793				20,057,000	2,972,000	2,972,000	2,972,000	1,042,920
						<b>\$30,015,920</b>				
						<b>TOTAL</b>				

\* Proposed hail damaged roof replacements will include the following 12 public housing properties: Cross Creek, Escondida, Francis Furey, Sahara Ramsey, Tarry Towne, Williamsburg, Pin Oak II, Charles Andrews, Morris Beldon, L.C. Rutledge, Lincoln Heights and Madonna.

**H. Construct 1,006 new housing units in 7 development projects at an estimated cost of \$163.7 million.**

**AFFORDABLE HOUSING EXPANSION /DEVELOPMENT PROJECTS 2015 - 2018**

Project	Total	Home Ownership	Market	Workforce Housing	PBV	PH	Est. Total Development Cost	Est. Start Date	FY 15	FY 16	FY 17	FY 18	FY 19
GARDENS at San Juan Square	252	0	0	158	31	63	\$31.7	Complete	\$31.7				
WESTSIDE Redevelopment Initiative	87	87	43	44	0	0	\$9.0	July-15	\$0.6	\$2.1	\$2.1	\$2.1	\$2.1
East Point Ph. I (Family)	220	0	64	77	8	71	\$43.9	July-15	\$7.3	\$29.3	\$7.3		
East Point Ph. II (Senior)	80	0	0	4	28	48	\$13.5	July-16	\$0.9	\$9.8	\$2.8		
East Point Ph. III (Multi-Family)	117	0	55	20	8	34	\$25.3	July-17			\$6.3	\$19.0	
Infill Housing	35	35	0	35	0	0	\$4.0	September-17		\$0.7	\$1.4	\$1.4	\$0.5
Chavez/ Labor St. Mixed Use	215	0	133	43	11	28	\$36.3	August-18		\$6.1	\$24.0	\$6.2	
<b>Total</b>	<b>1,006</b>	<b>122</b>	<b>295</b>	<b>381</b>	<b>86</b>	<b>244</b>	<b>\$163.7</b>		<b>\$40.5</b>	<b>\$48.0</b>	<b>\$43.9</b>	<b>\$28.7</b>	<b>\$2.6</b>

Note: Estimated Dollars are in millions

**I. Evaluate modernization and repositioning opportunities impacting 1,963 affordable housing units in the Beacon portfolio.**

EVALUATE REPOSITIONING OF ASSET									
Property Name	Unit Count	Activity	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	Comments	
Reagan West	15	Evaluate repositioning of asset	X					Low physical/financial score=60; Low policy & community scores; Small property (15 units); No debt.	
Detrich Road	30	Evaluate repositioning of asset	X					Low physical/financial score = 80; Low policy & community scores; Property isolated and located in industrial area; No debt.	
Homestead	157	Evaluate repositioning of asset	X					Low physical/financial score = 55; Low policy & community scores; Barely break-even operations with minimal debt; No prepayment penalty on debt.	
<b>Subtotal</b>	<b>202</b>								
EVALUATE PRESERVATION/MODERNIZATION OF ASSET									
Property Name	Unit Count	Activity	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	Comments	
Villa de Valencia	104	Evaluate Modernization/ Refinance		X				Major foundation repairs completed. Additional exterior and interior upgrades under construction.	
Springhill I & II & Courtland Park	505	Implement preservation Capex projects	X					\$6MM refinance completed in December 2016, capex projects totaling \$1.8MM, roof and window replacement to be completed during FY17-18.	
Castle Point	220	Implement preservation Capex projects	X					\$4MM refinance completed in December 2016, capex projects totaling \$3.8MM to completed during FY17-18.	
Woodhill	532	Implement preservation Capex projects	X					Complete Capex project of \$3.6 MM using funds released from HUD and completion repair from Frost Bank refinance.	
Monterrey Park	200	Evaluate modernize/refinance	X					Low physical/financial performance =70; Scores well on policy & community attributes; Located in REnewSA & ICRIIP location; Larger property with 220 units; Existing loan has no prepayment penalty and there is significant equity in the asset.	
Pecan Hill	100	Evaluate modernize/refinance	X					High physical/financial score =95; Scores well on policy & community attributes; No debt.	
Sunshine	100	Evaluate modernize/refinance			X			High physical/financial score =90; Scores well on policy & community attributes; No debt.	
<b>Subtotal</b>	<b>1761</b>								
<b>TOTAL</b>	<b>1963</b>								

**J. Contemplate Disposition of Non-Strategic Assets**

		FY 2017 MTW Disposition 5-Year Plan					
Owner/Grantee	Address	FY 2017	FY 2018	FY 2019	FY 2020	FY2021	Comments
<b>Las Varas Public Facility Corp.</b>							
Single Family Home	411 Santa Clara	X					Sell via MLS
<b>San Antonio Home Ownership Opportunities Corp.</b>							
Single Family Homes	7250 Glen Mist		X				Sell via MLS
	6211 Brownleaf		X				Sell via MLS
	9411 Strech Ave.	X					Sell via MLS
<b>San Antonio Housing Authority (SAHA) Public Housing</b>							
Residential Lots	1011 Yucca		X				Sell via MLS
	Springview Lots on Hedges St.	X					Three (3) parcels of vacant land. Platted for 40 single family homes. (903-937 Hedges St. & Rosary)
Scattered Sites	96 Scattered Sites		X				Based on proposed disposal of 96 of 163 homes.
Single Family Homes	2622 E. Commerce		X				Sell via MLS
	238 Corliss		X				Sell via MLS
	518 Corliss		X				Sell via MLS
	2806 Del Rio	X					Sell via MLS
	126 Ferris		X				Sell via MLS
	526 J. St.		X				Sell via MLS
	614 J. St.		X				Sell via MLS
	622 J. St.		X				Sell via MLS
	1071 Poinsettia St.		X				Sell via MLS
	1411 Montana		X				Sell via MLS
Warehouse/Other	2858 Wyoming	X					Sell via MLS
Other: Commercial/Large Parcels	200 Tampico	X					Awaiting approval from TCEQ on remediation plan.
	700 Garcia St.		X				Vacant Admin. Bldg. (Sheriff's Bldg.) 9,309 SF + 1.4 acres. Appraisal dated 10/09/15.
	Garcia @ RR Tracks	X					Two (2) parcels of land. Appraisal date 10/09/15.
	200 S. Rio Grande					X	Springview - Large Parcel. Sell via sealed bid.
	6510 S. Rio Grande					X	Springview - Large Parcel. Sell via sealed bid.
	440 Labor St	X					Sell via sealed bid.
	Land (Behind Convent)				X		Evaluate use of site as a mixed finance development.
	Leigh Street Lots	X					Lots sold via sealed bid. Awaiting closing.
	Artisen Park Lots		X				Lots to be sold via sealed bids.
210 S. Grimes				X		The Convent complex. Possible historic tax credit	
<b>San Antonio Housing Development Corp.</b>							
Other: Commercial/Large Parcels	7770 Ingram		X				Sell via sealed bid.
<b>San Antonio Housing Facility Corp.</b>							
	517 S. Grimes St.		X				Sell via sealed bid.
Warehouse	1310 S. Brazos		X				Awaiting approval from TCEQ on remediation plan.
Other: Commercial/Large Parcels	2730 E. Commerce					X	Sell via sealed bid.
	2830 E. Commerce					X	Sell via sealed bid.
<b>San Antonio Housing Finance Corp.</b>							
Single Family Homes	515 San Gabriel St.		X				Sell via MLS
	4846 Melvin		X				Sell via MLS
	211 E. Theo Ave.		X				Sell via MLS
<b>Beacon Properties</b>							
Detrich Road	4618 Dietrich Road	X					Sell via commercial broker listing.
Homestead	5800 Medina Base Road		X				Sell via commercial broker listing.
Reagan West	6503 Commerce Street			X			Sell via sealed bid.

## K. Future Updates

Possibilities for inclusion in future updates to the Asset Management Plan include:

- Rex Site: Potential Transit-Oriented Development
- Scattered Site Properties
- Redevelopment of Tampico Warehouse site
- Redevelopment of the Monastery of Our Lady of Charity property



- Liquidation of non-residential properties and non-strategic assets
- Choice Redevelopment Candidates:
  - Alazan-Apache Courts (741 units)
  - Cassiano Homes (499 units)
  - Lincoln Heights Courts (388 units)

**L. Exceptions**

The agency may consider disposition projects not identified in the MTW plan if they are deemed excess inventory and not supportive of the 2020 Strategic Plan. The agency may also consider unique, opportunistic, and unscheduled acquisition or construction projects that are not included in the MTW plan, but are supportive of the agencies 2020 Strategic Plan.

Such activities will not be considered significant amendments to the MTW plan, provided the following internal protocols are followed:

- 1) Completion of analysis describing the cost and benefits of the contemplated action
- 2) Consultation with other agency plans
- 3) Approval by ELT (and appropriate committee and Board of Commissioners if necessary)
- 4) The financial impact or cost of the activity is 5% or less of the annual expenses reflected in the current approved annual budget for the agency.

<b><i>P&amp;E Policy: Units of Housing Preserved</i></b>		
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>
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.	0	1793
Victoria Plaza	0	185
Cross Creek	0	66
Escondida	0	20
Francis Furey	0	66
Sahara Ramsey	0	16
Tarry Towne	0	98
Williamsburg	0	15
Pin Oak II	0	22
Charles Andrews	0	52
Morris Beldon	0	35
L.C. Rutledge	0	66
Lincoln Heights	0	338
Madonna		60
Scattered Site - 9354 Valley Gate	0	1
Blanco	0	100
WC White	0	75
Villa Tranchese	0	201
Fair Avenue	0	216
Le Chalet	0	34
Morris Beldon	0	35
Francis Furey	0	66
Olive Park	0	26