



**OPERATIONS AND REAL ESTATE
COMMITTEE MEETING
NOVEMBER 18, 2021**



BOARD OF COMMISSIONERS

Dr. Ana "Cha" Guzmán Chair	Olga Kauffman Vice Chair	Gilbert Casillas Commissioner	Dalia Contreras Commissioner	Loren D. Dantzler Commissioner	Gabriel Lopez Commissioner	Ignacio Perez Commissioner
-------------------------------	-----------------------------	----------------------------------	---------------------------------	-----------------------------------	-------------------------------	-------------------------------

PRESIDENT & CEO

Ed Hinojosa, Jr.

**SAN ANTONIO HOUSING AUTHORITY
*OPERATIONS AND REAL ESTATE COMMITTEE MEETING
OR SPECIAL BOARD MEETING
HYBRID TELECONFERENCE**

**Call In Phone Number: (346) 248-7799
Meeting ID: 93839434337# Passcode: 654170#
818 S. Flores St., San Antonio, TX 78204
1:30 p.m., Thursday, November 18, 2021**

A quorum of the Board of Commissioners may convene at this meeting thus triggering a Board meeting for discussion on the following matters. (Note: If a quorum of the Board attends this meeting, four Commissioners must be physically present at this location, but up to three other Commissioners may attend by videoconferencing, as permitted by Tex. Gov't Code Section 551.127):

MEETING CALLED TO ORDER

1. The Board of Commissioners or its Committee may hold a closed meeting pursuant to Texas Government Code § 551.071-076 for consultation concerning attorney-client matters, real estate, litigation, personnel, and security matters. The Board or Committee reserves the right to enter into closed meeting at any time during the course of the meeting.

PUBLIC COMMENT

2. **Public Comment at approximately 1:30 p.m.** (may be heard after this time) Citizens are provided up to three minutes each to speak to any agenda items. Citizens wishing to speak to items posted on the agenda should personally request to be placed on the Public Comment roster prior to 1:15 p.m. at 818 S. Flores St., San Antonio, TX 78204 or register online and access Phone Number: **(346) 248-7799** and enter Meeting ID: **93839434337#** and Passcode: **654170#**, prior to 1:15 p.m. A Spanish/English translator will be available to citizens needing translation.

Now is the time for public comments. The Board asks the public to address concerns related to SAHA matters and policy and not include statements that may be considered defamatory of any individual. The Board encourages members of the public to direct specific concerns or problems to SAHA staff for more prompt resolution. The Board will not discuss the comments of speakers or respond to speakers during the public comment portion of the agenda.

PRESENTATION

3. Public Perception and Resident Engagement (Michael Reyes, Public Affairs Officer)
4. SAHA Workforce Demographics (Aiyana Longoria, Interim Director of Human Resources)

PUBLIC HEARING

5. Public Hearing regarding Resolution 6192, authorizing the amendments to the adopted 2021-2022 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, Five-Year Capital Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action Plan (Richard Milk, Planning Officer)

INDIVIDUAL ITEMS

6. Housing Framework and Strategic Housing Implementation Plan (City of San Antonio)
7. Consideration and appropriate action regarding Resolution 6192, authorizing the amendments to the adopted 2021-2022 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, Five-Year Capital Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action Plan (Richard Milk, Planning Officer)
8. Consideration and appropriate action regarding Resolution 6187, authorizing the award of a contract for Legal Services Special Counsel for Board Matters for an annual cumulative amount not to exceed \$125,000.00; for a period of one year with the option to renew up to four additional one-year terms (George Ayala, Director of Procurement; Timothy E. Alcott, Chief Real Estate and Asset Management Officer)
9. Consideration and appropriate action regarding Resolution 6191, authorizing the award of a contract for legal services to Coats Rose, P.C., Clark Hill, Bracewell LLP, Langley & Banack, Inc., Hawkins Delafield & Wood LLP, Germer, PLLC, and Locke Lord LLP, for an annual cumulative amount not to exceed \$500,000.00; for a period of one year with the option to renew up to four additional one-year terms (George Ayala, Director of Procurement; Timothy E. Alcott, Chief Real Estate and Asset Management Officer)
10. Consideration and appropriate action regarding Resolution 6188, authorizing the award of a contract for repair and resurfacing of Cross Creek Apartments parking lot to Holtz/Adams Construction & Consulting LLC for an amount not to exceed \$341,188.00 (George Ayala, Director of Procurement; Zachariah Woodard, Director of Public Housing)
11. Consideration and appropriate action regarding Resolution 6194, authorizing the award of a contract for the broadband installation and services portion of the wifi expansion project to get Wireless, Inc. DBA Dojo Networks for a period of one year with the option to renew up to two additional one-year terms for an annual cumulative amount not to exceed \$417,744.00 for year one and an annual cumulative amount not to exceed \$323,994.00 for year two and for year three (George Ayala, Director of Procurement; Jo Ana Alvarado, Director of Innovative Technology)
12. Consideration and appropriate action regarding Resolution 6189, approving the 2022 Small Area Fair Market Rent (SAFMR) Payment Standard Schedule (Brandee Perez, Chief Operating Officer)
13. Consideration and appropriate action regarding Resolution 6190, approving the Payment Standard Schedule at 90% of Fair Market Rents (FMRs) for the Project-Based Voucher (PBV) Program (Brandee Perez, Chief Operating Officer)

14. Consideration and appropriate action regarding Resolutions 6195 and 21FIN-11-18, authorizing approval of the sale of the Rosemont at University Park Apartments Project (F/K/A Rosemont at Pleasanton), defeasance and payment of the outstanding bonds issued by the San Antonio Housing Finance Corporation, the assignment and assumption of the regulatory agreement and subsequent termination thereof upon the termination of the qualified project period, and authorizing a consent and assumption agreement, a termination agreement and a defeasance agreement and other matters in connection therewith (Thomas Roth, Director of Asset Management)

DISCUSSION ITEMS

15. Discussion regarding SAHA recruitment and staffing update (Aiyana Longoria, Interim Director of Human Resources)
16. Update and discussion regarding the FY2021 MTW Report and FY2020 MTW Compliance Determination (Richard Milk, Planning Officer)
17. Discussion regarding resident concerns

REPORTS

- Procurement Activity Report
- Quarterly Demographic Procurement Report
- FHP Quarterly Board Report [Jul - Sep]
- Proposed 2022 Board Calendar

RESOURCE

- Schedule of Units Under Development

18. Adjournment

*Note: Whenever the Texas Open Meetings Act (Section 551.001 et seq. of the Texas Government Code) provides for a closed meeting in matters concerning legal advice, real estate, contracts, personnel matters, or security issues, the Board may find a closed meeting to be necessary. For convenience of the citizens interested in an item preceded by an asterisk, notice is given that a closed meeting is contemplated. However, the Board reserves the right to go into a closed meeting on any other item, whether it has an asterisk, when the Board determines there is a need and a closed meeting is permitted.

"Pursuant to § 30.06, Penal Code, (trespass by holder license holder with a concealed handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not attend this meeting with a concealed handgun."

"Pursuant to § 30.07, Penal Code, (trespass by holder license holder with an openly carried handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not attend this meeting with a handgun that is carried openly.



WORKFORCE DEMOGRAPHICS

November 18, 2021

WORKFORCE DEMOGRAPHICS

2

Overview

Selected Demographic Charts

- Gender
- Ethnicity
- Age
- Tenure

Educational attainment by employees is not available as a report at this time, but the data will be collected for the “Employees Thrive” strategic goal.

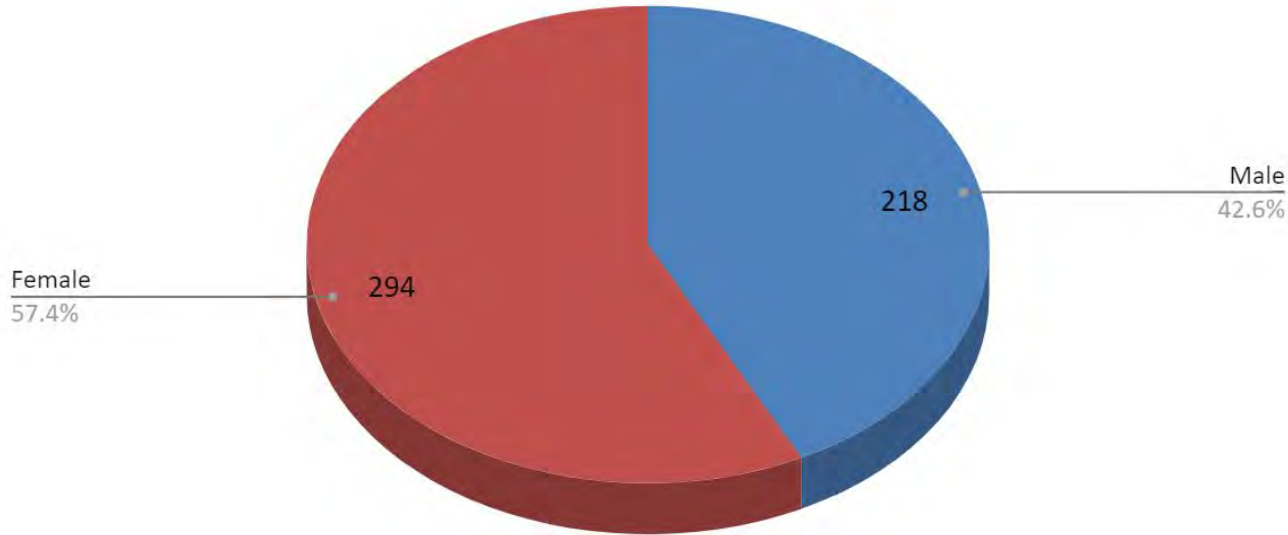
Data pulled from filled positions as of 9/30/2021

- 512 employees at the time of report

EMPLOYEE DEMOGRAPHICS BY GENDER

3

Employees by Gender

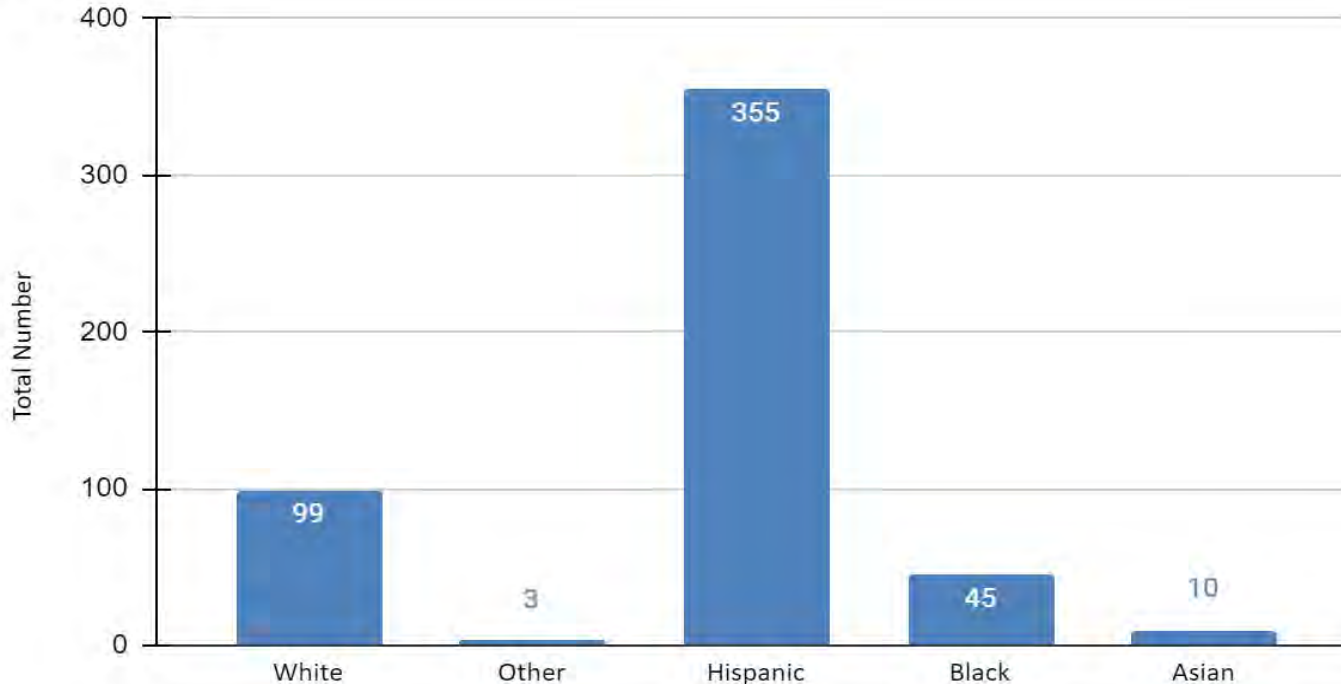


Total Employees = 512
Female = 57.4%
Male = 42.6%

EMPLOYEE DEMOGRAPHICS BY ETHNICITY

4

Ethnicity



Total Employees = 512

White = 19.3%

Other = .6%

Hispanic = 69.3%

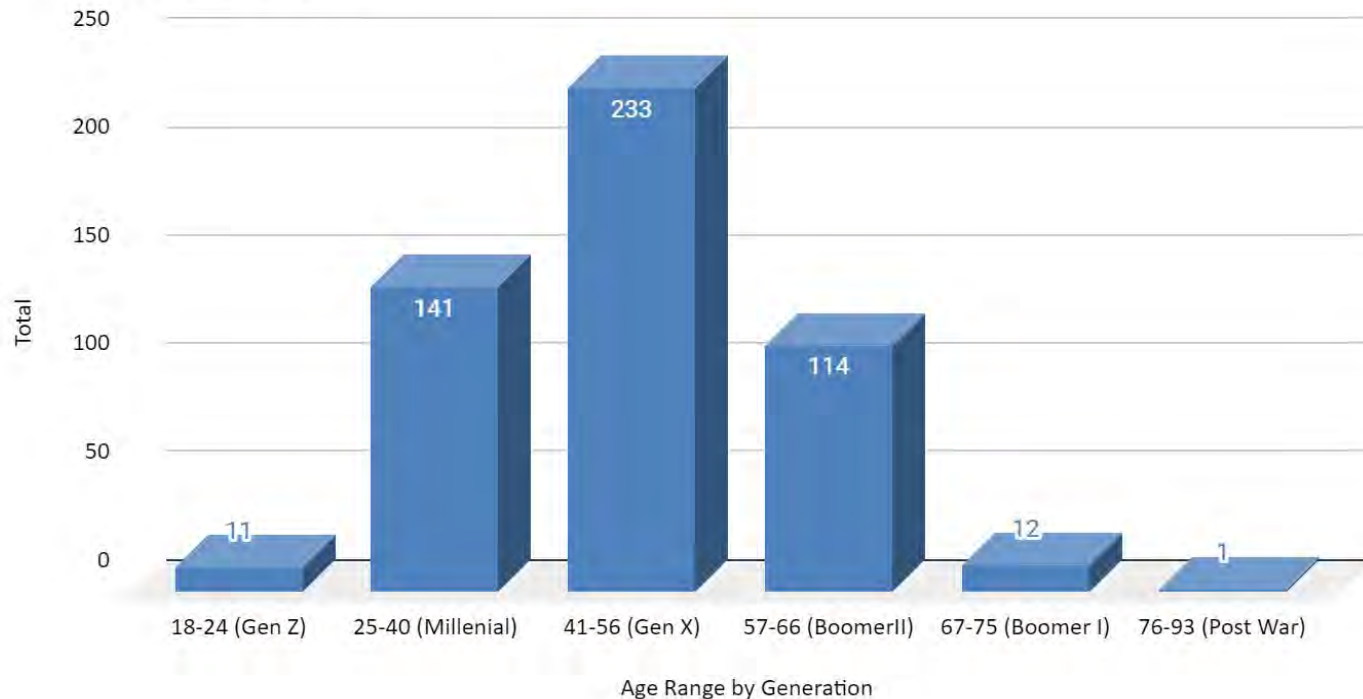
Black = 8.8%

Asian = 2%

EMPLOYEE DEMOGRAPHIC AGE (BY GENERATION)

5

Totals by Age Range



Total Employees = 512

18-24 = 2.1%

25-40 = 27.6%

41-56 = 45.6%

57-66 = 22.2%

67-75 = 2.3%

76-93 = .2%

Youngest Employee = 19

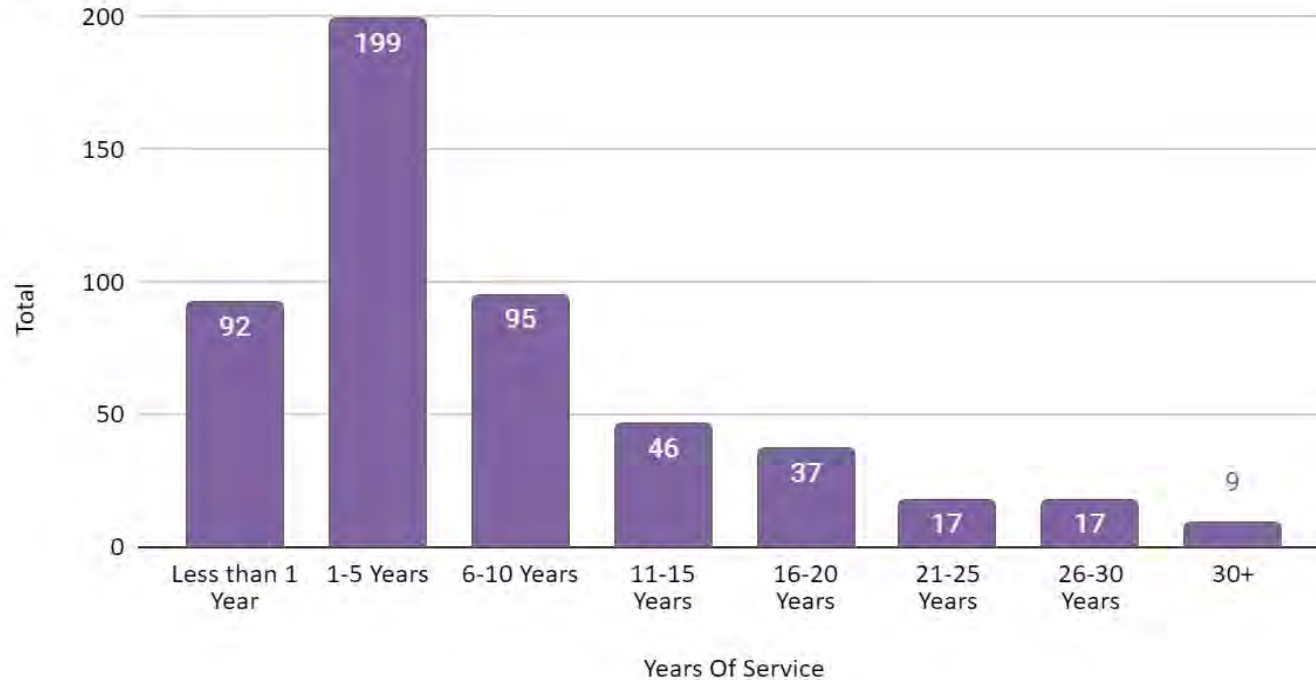
Oldest Employee = 80

Average Age = 47

EMPLOYEE DEMOGRAPHICS BY TENURE

6

Years Of Service



Total Employees = 512

Less than 1 Year = 18%

1-5 Years = 38.9%

6-10 Years = 18.6%

11-15 Years = 9%

16-20 Years = 7.2%

21-25 Years = 3.3%

26-30 Years = 3.3%

30 or more Years = 2%

Oldest Tenure = 38 Years

Average Tenure = 7 Years

QUESTIONS?



BOARD OF COMMISSIONERS

Dr. Ana "Cha" Guzmán Chair	Olga Kauffman Vice Chair	Gilbert Casillas Commissioner	Dalia Contreras Commissioner	Loren D. Dantzler Commissioner	Gabriel Lopez Commissioner	Ignacio Perez Commissioner
-------------------------------	-----------------------------	----------------------------------	---------------------------------	-----------------------------------	-------------------------------	-------------------------------

PRESIDENT & CEO

Ed Hinojosa, Jr.

**SAN ANTONIO HOUSING AUTHORITY
PUBLIC HEARING
HYBRID TELECONFERENCE**


**Call In Phone Number: (346) 248-7799
Meeting ID: 93839434337# Passcode: 654170#
818 S. Flores St., San Antonio, TX 78204
2:00 p.m., Thursday, November 18, 2021**

The Board of Commissioners will convene for a Public Hearing via hybrid teleconference for discussion on the following matters:

PROPOSED AMENDMENTS TO THE ADOPTED 2021–2022 MOVING TO WORK AGENCY PLAN, FSS ACTION PLAN, AND PUBLIC HOUSING LEASE UPDATES

1. Introduction and background (Richard Milk, Planning Officer)
2. Proposed Amendments to the adopted 2021-2022 Moving to Work Agency Plan (Richard Milk, Planning Officer)
 - Moving to Work Plan
 - Housing Choice Voucher Administrative Plan
3. Public Comments/Feedback
4. Summary and Next Steps (Richard Milk, Planning Officer)

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021****BOARD OF COMMISSIONERS
Operations and Real Estate Committee****RESOLUTION 6192, AUTHORIZING AMENDMENTS TO THE ADOPTED 2021-2022 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, THE FIVE-YEAR CAPITAL IMPROVEMENT AND DEVELOPMENT PLAN, AND THE FAMILY SELF-SUFFICIENCY (FSS) PROGRAM ACTION PLAN**

DocuSigned by:

 D7D46F73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 051262290233493...
Richard Milk
Planning Officer

REQUESTED ACTION:

Hold a Public Hearing and consideration and appropriate action regarding Resolution 6192, authorizing the amendments to the adopted 2021-2022 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), the Capital Fund Program Plan (CFP), the five-year Capital Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action plan.

SUMMARY:

The U.S. Department of Housing and Urban Development (HUD) requires Public Housing Authorities (PHAs) to annually submit a five-year plan and an annual business plan, commonly referred to as the Agency Plan(s). Due to SAHA's designation as a Moving-to-Work (MTW) agency, the MTW Plan serves as SAHA's Agency Plan. The MTW Plan includes: the Public Housing Admissions and Continued Occupancy Plan (ACOP), the Housing Choice Voucher Administrative Plan (Admin Plan), and the Capital Fund Program Plan. The MTW Plan also describes SAHA's policies, programs, operations, strategies and flexibilities in meeting the local housing needs and goals.

The 2021-2022 MTW Plan was approved by HUD on October 26, 2021. The Agency is seeking an amendment to an existing activity through an expedited review process.

I. Proposed Amendments to FY2021-2: Limiting increases in rents:

1. The Agency is proposing two changes to this activity:
 - a. increase the maximum rent increase from 3% to 5%
 - b. limit the number of rent increase requests by landlords to one per year

II. Revisions to Housing Choice Voucher (HCV) Administrative Plan Only**(6) Rental Increase Limit**

- (a) In order to promote housing stability, SAHA is limiting rental increases to no more than 5% of the current rental amount and one rental increase per year.

SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

- (i) The proposed rental increase must still be determined reasonable in accordance with Section 8.3.B.
- (b) This activity will be sunsetted after 24 months, or sooner, if the national funding situation improves and the agency is able to meet MTW requirements of serving substantially the same number of households.

MTW AMENDMENT TIMELINE

- November 1: Draft MTW Plan posted for public comment
- November 18: Public Hearing scheduled during Operations and Real Estate Committee Meeting
- December 2: Consideration and approval by Board of Commissioners and submission to HUD
- December: Address HUD questions
- January 1: Initiate implementation of the MTW Plan

FINANCIAL IMPACT:

Under SAHA's MTW Plan, Public Housing, Housing Choice Voucher Program, and Capital Fund resources are all combined into a single fund with full-funding flexibility. All MTW initiatives will continue to be funded from this single fund.

STRATEGIC OUTCOME:

Supports all resident-focused strategic outcomes.

ATTACHMENTS:

Resolution 6192
Section III. Proposed MTW Activities
Presentation

**San Antonio Housing Authority
Resolution 6192**

RESOLUTION 6192, AUTHORIZING THE AMENDMENTS TO THE ADOPTED 2021-2022 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, FIVE-YEAR CAPITAL IMPROVEMENT AND DEVELOPMENT PLAN, AND THE FAMILY SELF-SUFFICIENCY (FSS) PROGRAM ACTION 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 amendments to the 2021-2022 Moving to Work (MTW) Agency Plan for fiscal year 2021-2022, including the revised MTW Plan, Public Housing Admissions and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan (Admin Plan), the Capital Fund Program, and the Family Self-Sufficiency (FSS) Program Action plan; and

WHEREAS, the Board of Commissioners of the San Antonio Housing Authority also desires to authorize the submission of the amendments to the 2021-2022 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 San Antonio Housing Authority, hereby:

- 1) Approves Resolution 6192, authorizing the amendments to the adopted 2021-2022 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, five-year Capital Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action Plan; and
- 2) Authorizes the Chair and President and CEO to execute and submit such certifications and other documents as necessary for the submission of the 2021-2022 MTW Plan to HUD.

Passed and approved the 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

Section III. Proposed MTW Activities

PROPOSED AMENDMENTS

The Agency is proposing amendments to one existing MTW activity.

FY2021-2: Limiting increases in rents

Background: The local rent market has seen unprecedented impacts from the ongoing pandemic. As a result, the Agency has reviewed this activity and determined that an increase from 3% to 5% will balance out the priority to protect clients from large rent increases with the need to support voucher holders in being competitive tenants in the rental market.

Proposed amendment: The Agency is proposing to amend the current activity to adjust the maximum rent increase from 3% to no more than 5%. In addition, the Agency is seeking to limit the number of rental increase requests to one per year.

A. ACTIVITY DESCRIPTION

i. Describe the proposed activity.

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

Activity Overview

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

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

This activity is designed to increase housing choices for low-income families who might be experiencing a loss of income or other economic hardship, and are unable to pay additional rent.

iii. Provide the anticipated schedule for implementing the proposed activity.

This proposed activity would be ready for implementation July 1, 2020, pending HUD approval.

B. ACTIVITY METRICS INFORMATION

HUD Standard Metrics

HC #4: Displacement Prevention



Unit of Measurement	Baseline	Benchmark
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	Households losing assistance/moving prior to implementation of the activity (number).	Expected households losing assistance/moving after implementation of the activity (number).
# of households losing assistance due to non-payment of rent	# of households who lost assistance due to non-payment of rent in FY2020 (12-month avg?)	# of households who lost assistance due to non-payment of rent in FY2021 (12-month avg?)
Avg variation in rent, lease over lease [goal: Maintain client's tenant rent constant]	Avg tenant rent in FY2020 (TBD)	Avg tenant rent in FY2021 (TBD)

C. COST IMPLICATIONS

i. State whether the proposed activity will result in any cost implications (positive and/or negative) for the MTW PHA.

The agency anticipates, based on a sampling of requests for rental increases submitted in March, a monthly savings of \$118,642 in HAP and \$64,844 in rent portions for tenants.

The agency anticipates, based on a sampling of requests for rental increases, a monthly increase of \$8 in HAP and \$9 in tenant portion per household account as a result of amending the maximum increase from 3% to 5%.

D. NEED/JUSTIFICATION FOR MTW FLEXIBILITY

Explanation <i>Explain why the cited authorization(s) is needed to engage in the proposed activity.</i>	Attachment C Authorization <i>Cite the authorization(s) detailed in Attachment C and/or D of the Standard MTW Agreement (or applicable successor section in future iterations of the MTW Agreement) that gives the MTW PHA flexibility to conduct the proposed activity.</i>
NEW REQUESTED WAIVERS	
Rent Policies: Allows the Agency to determine tenant rent and related policies.	Section D.2. HCV Rent Policies and Term Limits. a. The Agency is authorized to adopt and implement any reasonable policy to establish payment standards, rents or subsidy levels for tenant-based assistance that differ from the currently mandated program requirements in the 1937 Act and its implementing regulations. The Agency is authorized to adopt and implement any reasonable policies to calculate the tenant portion of the rent that differ



	<p>from the currently mandated program requirements in the 1937 Act and its implementing regulations. This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to implement the Agency's Annual MTW Plan;</p> <p>b. The Agency is authorized to determine contract rents and increases and to determine the content of contract rental agreements that differ from the currently mandated program requirements in the 1937 Act and its implementing regulations. This authorization waives certain provisions of Sections 8(o)(7) and 8(o)(13) of the 1937 Act and 24 C.F.R. 982.308, 982.451 and 983 Subpart E as necessary to implement the Agency's Annual MTW Plan</p>
--	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

E. RENT REFORM INFORMATION

HUD defines "rent reform" as any change to how rent/tenant share is calculated for a household that would not be allowable absent the MTW activity. Any MTW activity that an MTW PHA enacts that alters the rent calculation (the amount a household contributes towards their housing costs) would be considered a type of rent reform. The following information must be provided for all rent reform activities. In addition, any MTW activity that seeks to adopt a term limit in the public housing program must include information on items (ii)-(iv).

Not considered a rent reform activity.



The Agency is proposing one new MTW activity.

FY2022-1: SAHA Partnerships Providing Basic Needs for Residents Through Income Exclusions

The Agency is proposing to use its MTW flexibility to support current long-term strategies for ensuring SAHA residents have access to basic needs such as sufficient food, water, and clothing in addition to safe, quality, affordable housing.

Background: San Antonio faced an unprecedented, historic and dangerous winter storm dropping temperatures to the single digits and leaving the city in blankets of snow that continues to affect millions throughout the state, including thousands of SAHA residents. From February 19th through the present day, the agency has received an outpouring of support from the community, elected officials, businesses and the greater San Antonio community with assistance. Community leaders delivered blankets, hot meals and water to SAHA residents. In total, more than 3,000 hot meals were delivered and more than 40,000 bottles of water were distributed to SAHA elderly residents, disabled residents and families.

While this outpouring has been truly amazing, the Agency recognizes that this support is needed on an ongoing basis and SAHA and its partners must work together to meet residents' needs. As the Agency continues to take immediate actions in response to the devastating impact of the ongoing pandemic and the recent winter storm, the Agency is also prioritizing long-term outcomes as part of its rolling five-year strategic plan. The Agency is seeking to expand partnerships to develop innovative solutions that meet the needs of those we serve and who are most vulnerable to the circumstances.

A. ACTIVITY DESCRIPTION

i. Describe the proposed activity.

This activity establishes an alternative policy that excludes contributions in the household's annual income calculation. Specifically, contributions received directly by the household from a SAHA partner or contributions distributed to a household on behalf of a SAHA partner will not be included in the households annual income for purposes of calculating rent.

Contributions covered by this policy include regular monetary and nonmonetary contributions or gifts provided by SAHA partners. Examples include: (i) regular payment of a family's bills (e.g., utilities, telephone, rent, credit cards, and car payments), (ii) cash or other liquid assets, and (iii) "in-kind" contributions such as groceries and clothing provided to a family on a regular basis.

Contributions not covered by this policy include any regular monetary and nonmonetary contributions or gifts from persons not residing in the household, including from organizations not officially partnered with SAHA.



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

This activity is designed to meet the statutory objective of increasing housing choices. In addition, this activity is in alignment with the Agency's strategic outcome to pursue partnerships that result in SAHA residents having access to basic non-housing needs such as sufficient food, water, and clothing. By excluding these contributions from the annual income, SAHA clients will be able to receive additional local support and not have their housing assistance negatively impacted.

iii. Provide the anticipated schedule for implementing the proposed activity.

This activity is planned to be implemented on October 1, 2021 with one established partner.

B. ACTIVITY METRICS INFORMATION

HUD Standard Metrics

HC #7: Households Assisted by Services that Increase Housing Choice		
Unit of Measurement	Baseline	Benchmark
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 receiving contributions from a SAHA partner	0 households receiving services	Estimated 1,500 served monthly or 18,000 served annually for food assistance (this may include one household being served multiple months)

CE #4: Increase in Resources Leveraged		
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).
Total amount leveraged from SAHA partners for SAHA clients across cash and non-cash contributions	0 resourced leveraged	Estimated \$700,000 leveraged annually for food assistance

Data Source: This will be tracked through the Agency's Case Management Software as well as through various data sharing agreements with partners.

*As the Agency enters in to new partnerships, the indicators will be updated accordingly

C. COST IMPLICATIONS

i. State whether the proposed activity will result in any cost implications (positive and/or negative) for the MTW PHA.

The Agency is not expecting to incur additional costs as a result of this activity. Because the new partnerships will yield new cash and non-cash contributions for SAHA residents, the cost



implication is the unrealized financial benefit of lower HAP expenses and higher PH rental revenue as a result of projected increases in household income. The Agency is committed to ensuring partner contributions do not increase household rent share. The Agency's current budgeting process does not include these projected decreases in HAP expenses and increases in PH rental revenue as a result of household increased income.

ii. If the proposed activity does result in cost implications, provide an estimate of the amount and discuss how the MTW PHA will manage the surplus or deficit anticipated.

Not Applicable.

D. NEED/JUSTIFICATION FOR MTW FLEXIBILITY

i. Cite the authorization(s) detailed in Attachment C and/or D of the Standard MTW Agreement (or applicable successor section in future iterations of the MTW Agreement) that gives the MTW PHA flexibility to conduct the proposed activity.

ii. Explain why the cited authorization(s) is needed to engage in the proposed activity.

Explanation <i>Explain why the cited authorization(s) is needed to engage in the proposed activity.</i>	Attachment C Authorization <i>Cite the authorization(s) detailed in Attachment C and/or D of the Standard MTW Agreement (or applicable successor section in future iterations of the MTW Agreement) that gives the MTW PHA flexibility to conduct the proposed activity.</i>
NEW REQUESTED WAIVERS	
<p>Exclusion of “regular contributions or gifts received from organizations”:</p> <p>24 CFR 5.609(c)(7) states annual income includes "Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from organizations or from persons not residing in the dwelling."</p> <p>The Agency is requesting waivers in order to exclude “regular contributions or gifts received from organizations”.</p> <p>Under this activity a household’s annual income for public housing and Housing Choice Vouchers will exclude monetary and non-monetary contributions that are received directly by the household from a SAHA partner or are received by SAHA and distributed to the household on behalf of the SAHA.</p>	<p>Attachment C, Section C.11 Rent Policies and Term Limits: The Agency is authorized to determine family payment, including the total tenant payment, the minimum rent, utility reimbursements and tenant rent. The Agency is authorized to adopt and implement any reasonable policies for setting rents in public housing including but not limited to establishing definitions of income and adjusted income, or earned income disallowance that differ from those in current statutes or regulations. The Agency is authorized to adopt and implement term limits for its public housing assistance. Such policies must include provisions for addressing hardship cases. This authorization waives certain provisions of Section 3(a)(2), 3(a)(3)(A) and Section 6(l) of the 1937 Act and 24 C.F.R. 5.603, 5.611, 5.628, 5.630, 5.632, 5.634 and 960.255 and 966 Subpart A as necessary to implement the Agency's Annual MTW Plan;</p> <p>Attachment C, Section D.2.b. Rent Policies and Term Limits The Agency is authorized to determine contract rents and increases and to determine the</p>



	<p>content of contract rental agreements that differ from the currently mandated program requirements in the 1937 Act and its implementing regulations. This authorization waives certain provisions of Sections 8(o)(7) and 8(o)(13) of the 1937 Act and 24 C.F.R. 982.308, 982.451 and 983 Subpart E as necessary to implement the Agency's Annual MTW Plan;</p> <p>Attachment C, Section D.3.a. Eligibility of Participants: The Agency is authorized to determine income qualifications for participation in the rental assistance program that differ from the currently mandated program requirements in the 1937 Act and its implementing regulations, as long as the requirements that i) at least 75 percent of those assisted under the demonstration are "very low-income" as defined in section 3(b)(2) of the 1937 Act, ii) substantially the same number of low-income persons are assisted under the demonstration as would be without the MTW authorizations contained herein, and iii) a comparable mix of families are assisted under the Agreement as would have been otherwise in Section I.C. of the MTW Agreement are met. This authorization waives certain provisions of Sections 16(b) and 8(o)(4) of the 1937 Act and 24 C.F.R. 5.603, 5.609, 5.611, 5.628, and 982.201 as necessary to implement the Agency's Annual MTW Plan;</p>
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

E. RENT REFORM INFORMATION

HUD defines "rent reform" as any change to how rent/tenant share is calculated for a household that would not be allowable absent the MTW activity. Any MTW activity that an MTW PHA enacts that alters the rent calculation (the amount a household contributes towards their housing costs) would be considered a type of rent reform. The following information must be provided for all rent reform activities. In addition, any MTW activity that seeks to adopt a term limit in the public housing program must include information on items (ii)-(iv).

i.IMPACT ANALYSIS

The MTW PHA may provide an impact analysis for each component of the rent reform activity or a comprehensive impact analysis of the rent reform activity. To assess the impacts of the rent reform activity, the following steps are suggested:

(1) A description of how the proposed MTW activity will impact household rent/tenant share.

The activity will eliminate the increase in rent for clients as a result of excluding cash and non-cash contributions from SAHA partners.

(2) A description of how the MTW PHA will implement and track the rent reform activity and how that process will enable the identification of any unintended consequences/impacts.



This activity will be implemented for new admissions and current residents upon approval from HUD and the start of the FY2022. Tracking will take place in the Agency's case management software and in partnerships with SAHA partners through data sharing agreements. The Agency will also establish points of contact for SAHA and its partners to monitor unintended consequences and impacts.

(3) A numerical analysis detailing the intended/possible impacts of the rent reform activity (including changes to the amount of rent/tenant share, rent burden increases/decreases, households affected, etc.)

This rent reform removes the potential increase in household rent as a result of future contributions by SAHA partners.

(4) A plan for how the MTW PHA will weigh the consequences/benefits of the rent reform activity to determine whether it should be adjusted/ terminated/ reduced/ continued/ expanded.

The Agency will monitor the impacts of this activity through its annual evaluation process for the Agency Strategic Plan as well as other internal evaluations of this specific activity as identified.

ii. HARDSHIP CASE CRITERIA

The MTW PHA must establish a hardship policy that clearly defines the circumstances under which households may be exempted or provided temporary relief from the activity. The MTW PHA must describe how such households could access the hardship policy and the associated process.

The Agency does not anticipate the need for a specific hardship policy as a result of this activity. SAHA will follow standard hardship policies and procedures that are designed to allow the Agency flexibility to address unique, unforeseeable circumstances that may occur and to protect families in crisis.

iii. DESCRIPTION OF ANNUAL REEVALUATION

The MTW PHA must provide an overview as to how the activity will be reevaluated on an annual basis in the Annual MTW Report, mitigating negative impacts and unintended consequences.

The Agency has established internal review processes that will encompass reviewing key HUD metrics, SAHA operational metrics, and Partner outcome metrics to assess whether the activity is achieving its intended outcome and developing mid-course corrections as needed.

iv. TRANSITION PERIOD

The MTW PHA must develop a plan and timeline for transitioning households into the activity. If a rent reform activity, the MTW PHA should show how the impact analysis informed this transition period

The elimination of contributions from SAHA partners will be made effective as of July 1, 2021 upon HUD's approval. As SAHA enters into partnerships, tracking procedures will be set up as part of the data sharing agreement process.





AMENDMENTS TO THE MTW PLAN 2022

Operations and Real Estate Committee
November 18, 2021

TODAY

2

Proposed Amendments to FY 2022 MTW Implementation Plans

- MTW Plan
- Admin Plan

MTW PLAN AMENDMENT TIMELINE

3

Expedited Timeline

- **October:** Consultation with HUD; Address HUD questions
- **November:** Public Hearing scheduled during Operations and Real Estate Committee Meeting
- **December:** Consideration and approval by Board of Commissioners and submission to HUD
- **December:** Address HUD questions
- **January 1:** Initiate implementation of the MTW Plan

PROPOSED AMENDMENT

4

- **No new waivers.**
- **Amendments respond to current market conditions and close a loophole in the policy.**
- **Activity is a temporary response to the current pandemic and funding environment. It has a planned sunset after 24 months.**

FY2021-2: Limiting increases in rents

- Increase the rental increase limit from 3% to 5%
- Limit the number of rental increase requests from landlords to 1 per year

ADMIN PLAN CHANGES

5

(6) Rental Increase Limit

- (a) In order to promote housing stability, SAHA is limiting rental increases to no more than ~~3%~~ 5% of the current rental amount and one rental increase per year.
 - (i) The proposed rental increase must still be determined reasonable in accordance with Section 8.3.B.
- (b) This activity will be sunsetted after 24 months, or sooner, if the national funding situation improves and the agency is able to meet MTW requirements of serving substantially the same number of households.

NEXT STEPS

6

NOVEMBER

- November 1: Comment Period Begins
- November 18: Public Hearing #1
Capture Public Comment
- November 30: Comment Period Ends

JANUARY

- Implementation of Amendments

DECEMBER

- December 2: Public Hearing #2
- December 2: Board Consideration of Amendments
- December 3: Submit Amendments to HUD

Comment Period: November 1 – November 30

Comments are due November 30, 2021, and may be emailed to **mtw@saha.org**, submitted through the online form, or physically delivered to: **Policy and Planning Department**, 818 S. Flores St., San Antonio, TX 78204. All documents can be found at **saha.org/public-notices**.

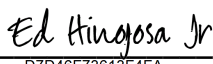
QUESTIONS?

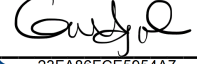
SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTION 6187, AUTHORIZING THE AWARD OF A CONTRACT FOR LEGAL SERVICES SPECIAL COUNSEL FOR BOARD MATTERS FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$125,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE-YEAR TERMS

DocuSigned by:

 D7D46E73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 23FA86FCE5954A7...
George Ayala
Director of Procurement

DocuSigned by:

 B75AC7309C8B406...
Timothy E. Alcott
**Chief Real Estate and
 Asset Management Officer**

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6187, authorizing the award of a contract for Legal Services Special Counsel for Board Matters for an annual cumulative amount not to exceed \$125,000.00; for a period of one year with the option to renew up to four additional one-year terms.

FINANCIAL IMPACT:

The cost for Legal Services for Special Counsel for Board Matters is not expected to exceed an annual cumulative amount of \$125,000.00, and will be funded through the approved operating budget or available reserves.

SUMMARY:

SAHA requires as-needed legal services for the Board of Commissioners of the San Antonio Housing Authority. The firm will provide services in areas to include, but not limited to: advising on legal matters and drafting documents as required; responding to open records and meeting issues; providing advice on governance and related issues; providing other legal services as requested by SAHA; and attending all regular board and committee meetings as well as special meetings as required.

On August 25, 2021, SAHA issued a Request for Proposals #2108-5136 for Legal Services that closed on September 22, 2021. The RFP was published on the SAHA E-Procurement Website, the Hart Beat, NAHRO E-Procurement website, and directly solicited to 68 firms. A total of nine responses were received in response to this solicitation, of which one law firm expressed interest in providing services in the area of special counsel for Board matters. The proposal will be provided to the Commissioners at the November 18, 2021 Operations and Real Estate Committee Meeting. The Commissioners will be asked to evaluate the proposal based on qualifications and experience, price, and strength of Section 3 and SWMBE Plan.

The Board is scheduled to announce their decision at the November 18, 2021, Operations and Real Estate Committee meeting. Final approval will be obtained at the December 2, 2021, Regular Board of Commissioners meeting.

SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

CONTRACT OVERSIGHT:

Contract oversight will be provided by Timothy E. Alcott, Chief Real Estate and Asset Management Officer, who will monitor the vendor's adherence to contract requirements and performance.

STRATEGIC OUTCOME:

Supports all strategic outcomes.

ATTACHMENTS:

Resolution 6187

Scoring Matrix

Advertisement List

**San Antonio Housing Authority
Resolution 6187**

RESOLUTION 6187, AUTHORIZING THE AWARD OF A CONTRACT FOR LEGAL SERVICES SPECIAL COUNSEL FOR BOARD MATTERS FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$125,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE-YEAR TERMS

WHEREAS, on August 25, 2021, SAHA issued a Request for Proposals #2108-5136 for Legal Services that closed on September 22, 2021; and

WHEREAS, a total of nine responses were received in response to this solicitation, of which one law firm expressed interest in providing services in the area of special counsel for Board matters; and

WHEREAS, the proposal has been provided to the Commissioners at the November 18, 2021, Operations and Real Estate Committee Meeting; and

WHEREAS, the cost for legal services for Special Counsel for Board Matters is not expected to exceed an annual cumulative amount of \$125,000.00 and will be funded through the approved operating budget or available reserves; and

WHEREAS, staff requests the Board of Commissioners authorize the President and CEO, or designee, to execute all documents associated with this contract.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of San Antonio Housing Authority, hereby:

- 1) Approves Resolution 6187, authorizing the award of a contract for Legal Services Special Counsel for Board Matters for an annual cumulative amount not to exceed \$125,000.00; for a period of one year with the option to renew up to four additional one-year terms.
- 2) Authorizes the President and CEO, or designee, to execute all necessary documents associated with this contract.

Passed and approved on the 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO



San Antonio Housing Authority
RFQ# 2108-5136 - Legal Services
Scoring Summary

	Total	Respondent's Qualifications and Experience	Price proposal	S/W/MBE Utilization and Section 3 Plans
Firm	/ 100 pts	/ 75 pts	/ 20 pts	/ 5 pts
Coats Rose, P.C.	93.94	75	14.94	4
Clark Hill	90.42	75	12.42	3
Bracewell LLP	87.94	75	9.44	3.5
Langley & Banack, Inc.	83.5	60	20	3.5
Escamilla & Poneck, LLP *	83.5	60	20	3.5
Hawkins Delafield & Wood LLP	81.72	67.5	14.22	0
Germer, PLLC	79.86	60	16.86	3
Locke Lord LLP	79.08	67.5	9.077	2.5
Fulton Strahan Law Group, PLLC	67.03	45	19.03	3

* Firm has indicated a preference to provide Special Counsel for Board Matters

Advertisement List
Solicitation # 2108-5136
Solicitation Title: Legal Services


	Email Address or Domain Name	Date Invited
1	admin@sawomenschamber.org	Aug 26th 2021, 1:56 PM CDT
2	admin@vxmlaw.com	Aug 26th 2021, 9:59 AM CDT
3	al@southsa.org	Aug 26th 2021, 1:56 PM CDT
4	amanda.buzanowski@ashurst.com	Aug 26th 2021, 9:59 AM CDT
5	aodom@bickerstaff.com	Aug 26th 2021, 9:59 AM CDT
6	aperez@splawpllc.com	Aug 26th 2021, 9:59 AM CDT
7	attorneysmallen@gmail.com	Aug 26th 2021, 9:59 AM CDT
8	BIDDINGLISTS@LGBS.COM	Aug 26th 2021, 9:59 AM CDT
9	bids@wbea-texas.org	Aug 26th 2021, 1:56 PM CDT
10	blackchamber@aol.com	Aug 26th 2021, 1:56 PM CDT
11	briannad@sahcc.org	Aug 26th 2021, 1:56 PM CDT
12	briewe@riewelaw.com	Aug 26th 2021, 9:59 AM CDT
13	camisha@simmonslegal.solutions	Aug 26th 2021, 9:59 AM CDT
14	cfuller@fullerlaw.org	Aug 26th 2021, 9:59 AM CDT
15	DDorsey@hawkins.com	Aug 26th 2021, 9:59 AM CDT
16	deon@warnerandassociates.com	Aug 26th 2021, 9:59 AM CDT
17	dmjamesjd@aol.com	Aug 26th 2021, 9:59 AM CDT
18	donna@dgdlawfirm.com	Aug 26th 2021, 9:59 AM CDT
19	dpetersen@sachamber.org	Aug 26th 2021, 1:56 PM CDT
20	droby@jsslaw.com	Aug 26th 2021, 9:59 AM CDT
21	ecallender@callender-law.com	Aug 26th 2021, 9:59 AM CDT
22	eflores@chalkerflores.com	Aug 26th 2021, 9:59 AM CDT
23	elva.adams@wellsfargo.com	Aug 26th 2021, 1:56 PM CDT
24	EMAIL@MEDINALAW.US	Aug 26th 2021, 9:59 AM CDT
25	framirez@ramirezassociates.com	Aug 26th 2021, 9:59 AM CDT
26	gabrielle@smsdc.org	Aug 26th 2021, 1:56 PM CDT
27	Glassman@BallardSpahr.com	Aug 26th 2021, 9:59 AM CDT
28	gpierce@gpiercelaw.com	Aug 26th 2021, 9:59 AM CDT
29	guyh@hbslawyers.com	Aug 26th 2021, 9:59 AM CDT
30	hollis@rutledge-associates.com	Aug 26th 2021, 9:59 AM CDT
31	info@alamocitychamber.org	Aug 26th 2021, 1:56 PM CDT
32	info@westsachamber.org	Aug 26th 2021, 1:56 PM CDT
33	isidore@yudellisidore.com	Aug 26th 2021, 9:59 AM CDT
34	Jacqueline.Jackson@utsa.edu	Aug 26th 2021, 1:56 PM CDT
35	JAMIE@FERRERFIRM.COM	Aug 26th 2021, 9:59 AM CDT
36	jean@daviskaufman.com	Aug 26th 2021, 9:59 AM CDT
37	jeff@agfirm.net	Aug 26th 2021, 9:59 AM CDT
38	jennifer.mort@utsa.edu	Aug 26th 2021, 1:56 PM CDT
39	jing.hao@gsaccc.org	Aug 26th 2021, 1:56 PM CDT
40	jking@kingsommer.com	Aug 26th 2021, 9:59 AM CDT
41	jls@jlsalazar.com	Aug 26th 2021, 9:59 AM CDT
42	jmcanelly@law-crg.com	Aug 26th 2021, 9:59 AM CDT

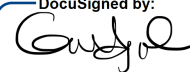
43	jmonty@montyramirezlaw.com	Aug 26th 2021, 9:59 AM CDT
44	joann.h2O@gmail.com	Aug 26th 2021, 9:59 AM CDT
45	julie@westsachamber.org	Aug 26th 2021, 1:56 PM CDT
46	katrinagrider@sbcglobal.net	Aug 26th 2021, 9:59 AM CDT
47	kwillis@thewillislawgroup.com	Aug 26th 2021, 9:59 AM CDT
48	leads@ywcass.com	Aug 26th 2021, 9:59 AM CDT
49	lynettefons@comcast.net	Aug 26th 2021, 9:59 AM CDT
50	mariyaf@sahcc.org	Aug 26th 2021, 1:56 PM CDT
51	mdrankoski@gardere.com	Aug 26th 2021, 9:59 AM CDT
52	meredya@rgrdlaw.com	Aug 26th 2021, 9:59 AM CDT
53	mroble@gdhm.com	Aug 26th 2021, 9:59 AM CDT
54	nlynch@lynchlf.com	Aug 26th 2021, 9:59 AM CDT
55	orestes.hubbard@utsa.edu	Aug 26th 2021, 1:56 PM CDT
56	pangenend@aallawfirm.net	Aug 26th 2021, 9:59 AM CDT
57	ptac@utsa.edu	Aug 26th 2021, 1:56 PM CDT
58	robert@wnrlaw.com	Aug 26th 2021, 9:59 AM CDT
59	RSolomon@hawkins.com	Aug 26th 2021, 9:59 AM CDT
60	rstroud@thestroutfirm.com	Aug 26th 2021, 9:59 AM CDT
61	sesalch@cb-firm.com	Aug 26th 2021, 9:59 AM CDT
62	sharon@texasmunicipallawyers.com	Aug 26th 2021, 9:59 AM CDT
63	smsdc@smsdc.org	Aug 26th 2021, 1:56 PM CDT
64	supplier@inventiveiplaw.com	Aug 26th 2021, 9:59 AM CDT
65	swallace@nixonpeabody.com	Aug 26th 2021, 9:59 AM CDT
66	swetsch@flash.net	Aug 26th 2021, 9:59 AM CDT
67	swhigham@mvalaw.com	Aug 26th 2021, 9:59 AM CDT
68	weltonlaw@gmail.com	Aug 26th 2021, 9:59 AM CDT


SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTION 6191, AUTHORIZING THE AWARD OF CONTRACTS FOR LEGAL SERVICES TO COATS ROSE, P.C., CLARK HILL PLC, BRACEWELL LLP, LANGLEY & BANACK, INC., HAWKINS DELAFIELD & WOOD LLP, GERMER, PLLC, AND LOCKE LORD LLP, FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$500,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE-YEAR TERMS

DocuSigned by:

 D7D46F73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 Z3FA86FCE5954A7...
George Ayala
Director of Procurement

DocuSigned by:

 B75AC7309C8B466...
Timothy E. Alcott
Chief Real Estate and Asset Management Officer

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6191, authorizing the award of Contracts for Legal Services to Coats Rose, P.C., Clark Hill PLC, Bracewell LLP, Langley & Banack, Inc., Hawkins Delafield & Wood LLP, Germer, PLLC, and Locke Lord LLP, for an annual cumulative amount not to exceed \$500,000.00; For a period of one year with the option to renew up to four additional one-year terms.

FINANCIAL IMPACT:

The cost for legal services is not expected to exceed an annual cumulative amount of \$500,000.00 and will be funded through the approved operating budget, project proceeds, or available reserves.

SUMMARY:

SAHA requires legal service firms to augment the work of SAHA's in-house counsel by rendering legal advice on various legal matters, including, but not limited to, labor and employment, public and affordable development and acquisition, construction, real estate, asset management, federal, state, and municipal government law and regulations, and litigation services, which may include, but not be limited to, dispute resolution, litigation support services, and related legal advice.

On August 25, 2021, SAHA issued a Request for Proposals #2108-5136 for Legal Services that closed on September 22, 2021. The RFP was published on the SAHA E-Procurement Website, the Hart Beat, NAHRO E-Procurement website, and directly solicited to 68 firms. A total of nine responses were received in response to this solicitation: Coats Rose, P.C., Clark Hill PLC, Bracewell LLP, Langley & Banack, Inc., Escamilla & Poneck, LLP, Hawkins Delafield & Wood LLP, Germer, PLLC, Locke Lord LLP, and Fulton Strahan Law Group, PLLC of which eight law firms expressed interest in providing services in the areas of labor and employment, construction, real estate, and development, and public law matters.

All proposals were evaluated based on the following criteria: qualifications and experience, price and strength of the Section 3 and SWMBE plans. Based upon the above, we are recommending contract awards to the seven highest-rated proposers. These firms are highly respected with the

SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

necessary expertise to assist SAHA in its operations.

PRIOR AWARDS:

All firms being recommended for the contract award, except for one, are currently under contract with SAHA to provide this service and have performed satisfactorily under their awarded contracts.

Please note: Firms indicating a preference to provide Special Counsel for Board Matters are not eligible to provide service for other areas of expertise. One firm expressed interest in this area: Escamilla and Poneck, LLP.

CONTRACT OVERSIGHT:

Contract oversight will be provided by Timothy E. Alcott, Chief Real Estate and Asset Management Officer, who will monitor the vendor's adherence to contract requirements and performance.

STRATEGIC OUTCOME:

Supports all strategic outcomes.

ATTACHMENTS:

Resolution 6191

Scoring Matrix

Advertisement List

**San Antonio Housing Authority
Resolution 6191**

RESOLUTION 6191, AUTHORIZING THE AWARD OF A CONTRACT FOR LEGAL SERVICES TO COATS ROSE, P.C., CLARK HILL, BRACEWELL LLP, LANGLEY & BANACK, INC., HAWKINS DELAFIELD & WOOD LLP, GERMER, PLLC, AND LOCKE LORD LLP, FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$500,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE-YEAR TERMS

WHEREAS, on August 25, 2021, SAHA issued a Request for Proposals #2108-5136 for Legal Services that closed on September 22, 2021; and

WHEREAS, a total of nine responses were received in response to this solicitation, of which eight law firms expressed interest in providing legal services in the various areas other than special counsel for board matters; and

WHEREAS, staff is recommending a contract award to the following seven highest-rated firms: Coats Rose, P.C., Clark Hill, Bracewell LLP, Langley & Banack, Inc., Hawkins Delafield & Wood LLP, Germer, PLLC, and Locke Lord LLP; and

WHEREAS, the cost for legal services is not expected to exceed an annual cumulative amount of \$500,000.00 and will be funded through the approved operating budget or available reserves; and

WHEREAS, staff requests the Board of Commissioners authorize the President and CEO, or designee, to execute all documents associated with these contracts.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of San Antonio Housing Authority, hereby:

- 1) Approves Resolution 6191, authorizing the award of a contract for Legal Services to Coats Rose, P.C., Clark Hill, Bracewell LLP, Langley & Banack, Inc., Hawkins Delafield & Wood LLP, Germer, PLLC, and Locke Lord LLP, for an annual cumulative amount not to exceed \$500,000.00; for a period of one year with the option to renew up to four additional one-year terms.
- 2) Authorizes the President and CEO, or designee, to execute all necessary documents associated with these contracts.

Passed and approved on the 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO



San Antonio Housing Authority
RFQ# 2108-5136 - Legal Services
Scoring Summary

	Total	Respondent's Qualifications and Experience	Price proposal	S/W/MBE Utilization and Section 3 Plans
Firm	/ 100 pts	/ 75 pts	/ 20 pts	/ 5 pts
Coats Rose, P.C.	93.94	75	14.94	4
Clark Hill	90.42	75	12.42	3
Bracewell LLP	87.94	75	9.44	3.5
Langley & Banack, Inc.	83.5	60	20	3.5
Escamilla & Poneck, LLP *	83.5	60	20	3.5
Hawkins Delafield & Wood LLP	81.72	67.5	14.22	0
Germer, PLLC	79.86	60	16.86	3
Locke Lord LLP	79.08	67.5	9.077	2.5
Fulton Strahan Law Group, PLLC	67.03	45	19.03	3

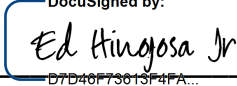
* Firm has indicated a preference to provide Special Counsel for Board Matters

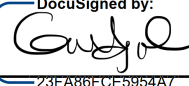
Advertisement List
Solicitation # 2108-5136
Solicitation Title: Legal Services

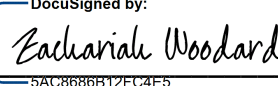
	Email Address or Domain Name	Date Invited
1	admin@sawomenschamber.org	Aug 26th 2021, 1:56 PM CDT
2	admin@vxmlaw.com	Aug 26th 2021, 9:59 AM CDT
3	al@southsa.org	Aug 26th 2021, 1:56 PM CDT
4	amanda.buzanowski@ashurst.com	Aug 26th 2021, 9:59 AM CDT
5	aodom@bickerstaff.com	Aug 26th 2021, 9:59 AM CDT
6	aperez@splawpllc.com	Aug 26th 2021, 9:59 AM CDT
7	attorneysmallen@gmail.com	Aug 26th 2021, 9:59 AM CDT
8	BIDDINGLISTS@LGBS.COM	Aug 26th 2021, 9:59 AM CDT
9	bids@wbea-texas.org	Aug 26th 2021, 1:56 PM CDT
10	blackchamber@aol.com	Aug 26th 2021, 1:56 PM CDT
11	briannad@sahcc.org	Aug 26th 2021, 1:56 PM CDT
12	briewe@riewelaw.com	Aug 26th 2021, 9:59 AM CDT
13	camisha@simmonslegal.solutions	Aug 26th 2021, 9:59 AM CDT
14	cfuller@fullerlaw.org	Aug 26th 2021, 9:59 AM CDT
15	DDorsey@hawkins.com	Aug 26th 2021, 9:59 AM CDT
16	deon@warnerandassociates.com	Aug 26th 2021, 9:59 AM CDT
17	dmjamesjd@aol.com	Aug 26th 2021, 9:59 AM CDT
18	donna@dgdlawfirm.com	Aug 26th 2021, 9:59 AM CDT
19	dpetersen@sachamber.org	Aug 26th 2021, 1:56 PM CDT
20	droby@jsslaw.com	Aug 26th 2021, 9:59 AM CDT
21	ecallender@callender-law.com	Aug 26th 2021, 9:59 AM CDT
22	eflores@chalkerflores.com	Aug 26th 2021, 9:59 AM CDT
23	elva.adams@wellsfargo.com	Aug 26th 2021, 1:56 PM CDT
24	EMAIL@MEDINALAW.US	Aug 26th 2021, 9:59 AM CDT
25	framirez@ramirezassociates.com	Aug 26th 2021, 9:59 AM CDT
26	gabrielle@smsdc.org	Aug 26th 2021, 1:56 PM CDT
27	Glassman@BallardSpahr.com	Aug 26th 2021, 9:59 AM CDT
28	gpierce@gpiercelaw.com	Aug 26th 2021, 9:59 AM CDT
29	guyh@hbslawyers.com	Aug 26th 2021, 9:59 AM CDT
30	hollis@rutledge-associates.com	Aug 26th 2021, 9:59 AM CDT
31	info@alamocitychamber.org	Aug 26th 2021, 1:56 PM CDT
32	info@westsachamber.org	Aug 26th 2021, 1:56 PM CDT
33	isidore@yudellisidore.com	Aug 26th 2021, 9:59 AM CDT
34	Jacqueline.Jackson@utsa.edu	Aug 26th 2021, 1:56 PM CDT
35	JAMIE@FERRERFIRM.COM	Aug 26th 2021, 9:59 AM CDT
36	jean@daviskaufman.com	Aug 26th 2021, 9:59 AM CDT
37	jeff@agfirm.net	Aug 26th 2021, 9:59 AM CDT
38	jennifer.mort@utsa.edu	Aug 26th 2021, 1:56 PM CDT
39	jing.hao@gsaccc.org	Aug 26th 2021, 1:56 PM CDT
40	jking@kingsommer.com	Aug 26th 2021, 9:59 AM CDT
41	jls@jlsalazar.com	Aug 26th 2021, 9:59 AM CDT
42	jmcanelly@law-crg.com	Aug 26th 2021, 9:59 AM CDT

43	jmonty@montyramirezlaw.com	Aug 26th 2021, 9:59 AM CDT
44	joann.h2O@gmail.com	Aug 26th 2021, 9:59 AM CDT
45	julie@westsachamber.org	Aug 26th 2021, 1:56 PM CDT
46	katrinagrider@sbcglobal.net	Aug 26th 2021, 9:59 AM CDT
47	kwillis@thewillislawgroup.com	Aug 26th 2021, 9:59 AM CDT
48	leads@ywcass.com	Aug 26th 2021, 9:59 AM CDT
49	lynettefons@comcast.net	Aug 26th 2021, 9:59 AM CDT
50	mariyaf@sahcc.org	Aug 26th 2021, 1:56 PM CDT
51	mdrankoski@gardere.com	Aug 26th 2021, 9:59 AM CDT
52	meredya@rgrdlaw.com	Aug 26th 2021, 9:59 AM CDT
53	mrobles@gdhm.com	Aug 26th 2021, 9:59 AM CDT
54	nlynch@lynchlf.com	Aug 26th 2021, 9:59 AM CDT
55	orestes.hubbard@utsa.edu	Aug 26th 2021, 1:56 PM CDT
56	pangenend@aalawfirm.net	Aug 26th 2021, 9:59 AM CDT
57	ptac@utsa.edu	Aug 26th 2021, 1:56 PM CDT
58	robert@wnrlaw.com	Aug 26th 2021, 9:59 AM CDT
59	RSolomon@hawkins.com	Aug 26th 2021, 9:59 AM CDT
60	rstroud@thestroutfirm.com	Aug 26th 2021, 9:59 AM CDT
61	sesalch@cb-firm.com	Aug 26th 2021, 9:59 AM CDT
62	sharon@texasmunicipallawyers.com	Aug 26th 2021, 9:59 AM CDT
63	smsdc@smsdc.org	Aug 26th 2021, 1:56 PM CDT
64	supplier@inventiveiplaw.com	Aug 26th 2021, 9:59 AM CDT
65	swallace@nixonpeabody.com	Aug 26th 2021, 9:59 AM CDT
66	swetsch@flash.net	Aug 26th 2021, 9:59 AM CDT
67	swhigham@mvalaw.com	Aug 26th 2021, 9:59 AM CDT
68	weltonlaw@gmail.com	Aug 26th 2021, 9:59 AM CDT

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021****BOARD OF COMMISSIONERS
Operations and Real Estate Committee****RESOLUTION 6188, AUTHORIZING THE AWARD OF A CONTRACT FOR REPAIR AND RESURFACING OF CROSS CREEK APARTMENTS PARKING LOT TO HOLTZ/ADAMS CONSTRUCTION & CONSULTING LLC (ESBE, SBE, VBE) FOR AN AMOUNT NOT TO EXCEED \$341,188.00**

DocuSigned by:

 D7D40F73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 23FA86FCE5954A7...
George Ayala
Director of Procurement

DocuSigned by:

 5AC8686B12FC4E5...
Zachariah Woodard
Director of Public Housing

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6188, authorizing the award of a contract for repair and resurfacing of Cross Creek Apartments parking lot to Holtz/Adams Construction & Consulting LLC (ESBE, SBE, VBE) for an amount not to exceed \$341,188.00.

FINANCIAL IMPACT:

The current award recommendation for repair and resurfacing of Cross Creek Apartments parking lot is not expected to exceed an amount of \$341,188.00, to include a base bid of \$305,745.32, unit pricing in the amount of \$4,425.31, and a 10% contingency of \$31,017.06 to allow for unforeseen work that may be required to complete this project. This project will be funded using CFP grant funds or other available reserves.

SUMMARY:

Cross Creek Apartments, built in 1977, is a family community located in northeast San Antonio, City Council District 2. The buildings are two-story structures with a brick and siding facade. The community consists of 66 units to include 5 one bedrooms, 28 two bedrooms, 28 three bedrooms, and 5 four bedrooms.

SAHA requires the services of a contractor to repair and resurface the parking lot at Cross Creek Apartments. Services will include milling the existing asphalt surface, cutting out any areas that have failed, correct issues with base materials, seal cracks, apply a seal coat then a tack coat, install a new course of asphalt of approximately two inches in thickness properly compacted for a durable and finished appearance, paint new stripes to indicate parking slots, and designate new dedicated handicapped parking slots with the appropriate markings and signage.

This project will be done in stages so as to reduce the inconvenience to the residents. The contractor shall also provide all necessary barricades that will restrict access to the work areas allowing for uninterrupted work in a given area. The estimated time for completion of this project is 120 days.

On September 17, 2021, SAHA issued an Invitation For Bids #2109-5176 for Repair and Resurfacing of Cross Creek Apartments Parking Lot that closed on October 6, 2021. The IFB was published on the SAHA E-Procurement Website, the Hart Beat, NAHRO E-Procurement website, and directly solicited to 81 contractors. A total of three bids were received in response to this

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

solicitation: Addison Prim, LLC (DBE, ESBE, HABE, MBE, SBE, WBE), BR General Contractors, LLC, and Holtz/Adams Construction and Consulting (ESBE, SBE, VBE). One bid was deemed non responsive as the bidder did not include the Bid Bond as required in the solicitation. The remaining two bids were evaluated on the following criteria: purchase price, reputation of the bidder and his goods or services, quality of the goods or services, extent to which the goods or services meet SAHA's needs, total long term cost, and any relevant criteria contained within the solicitation document. Based on the above, we are recommending a contract award to Holtz/Adams Construction and Consulting LLC. They are the lowest priced qualified bidder.

COMPANY PROFILE:

Holtz/Adams Construction and Consulting Services was established in 2017 and is headquartered in San Antonio, Texas. The co-owners of this company, with over 60 years collective experience in all aspects of residential and commercial construction, joined together to form Holtz/Adams. This contractor has been certified as a ESBE, SBE, VBE by the South Central Texas Regional Certification Agency. They service the San Antonio and surrounding areas providing services in the areas of residential construction, mixed-use construction, historic renovation, infrastructure development, commercial construction consulting, custom homes, new homes, whole home renovations, multi-family housing, housing developments, religious building construction, church renovations, industrial construction, street construction, parking lot construction, and commercial painting. Their client list includes the Archdiocese of San Antonio, Bartlett Cocke, CR Stone Construction, Palo Alto College, and UTSA.

PRIOR AWARDS:

This contractor has received a prior award from SAHA for Lila Cockrell Apartments Parking Lot Improvements. This project began on October 20, 2021.

CONTRACT OVERSIGHT:

Contract oversight will be provided by Zachariah Woodard, Director of Public Housing, who will monitor the vendor's adherence to contract requirements and performance. The Procurement Department will monitor compliance with the vendor's Section 3 and SWMBE good faith utilization plans.

STRATEGIC OUTCOME:

SAHA residents live in quality affordable housing.

ATTACHMENTS:

Resolution 6188
Bid Tabulation
Advertisement List

**San Antonio Housing Authority
Resolution 6188**

RESOLUTION 6188, AUTHORIZING THE AWARD OF A CONTRACT FOR REPAIR AND RESURFACING OF CROSS CREEK APARTMENTS PARKING LOT TO HOLTZ/ADAMS CONSTRUCTION & CONSULTING LLC (ESBE, SBE, VBE) FOR AN AMOUNT NOT TO EXCEED \$341,188.00

WHEREAS, on September 17, 2021, SAHA issued an Invitation For Bids # 2109-5176 for Repair and Resurfacing of Cross Creek Apartments Parking Lot that closed on October 6, 2021; and

WHEREAS, three proposals were received in response to the IFB. One bid was deemed non responsive as the contractor did not include the required Bid Bond; and

WHEREAS, staff are recommending a contract award to Holtz/Adams Construction and Consulting LLC. They are the lowest priced qualified bidder; and

WHEREAS, the current award recommendation for repair and resurfacing of Cross Creek Apartments parking lot is not expected to exceed an amount of \$341,188.00 to include a base bid of \$305,745.32, unit pricing in the amount of \$4,425.31 and a 10% contingency of \$31,017.06 to allow for unforeseen work that may be required to complete this project. This project will be funded using CFP grant funds or other available reserves; and

WHEREAS, staff requests the Board of Commissioners authorize the President and CEO, or designee, to execute all documents associated with this contract.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of San Antonio Housing Authority, hereby:

- 1) Approves Resolution 6188, authorizing the award of a contract for repair and resurfacing of Cross Creek Apartments parking lot to Holtz/Adams Construction & Consulting LLC (ESBE, SBE, VBE) for an amount not to exceed \$341,188.00.
- 2) Authorizes the President and CEO, or designee, to execute all necessary documents associated with this contract.

Passed and approved the 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

San Antonio Housing Authority
IFB# 2109-5176 Repair and Resurfacing of Cross Creek Apartments Parking Lot
Bid Tabulation

			Addison Prime, LLC		BR General Contractors, LLC		Holtz/Adams Construction and Consulting, LLC	
#	Items	Quantity Required	Unit Price	Total Cost	Unit Price	Total Cost	Unit Price	Total Cost
1								
#1-1	Mill Repair Resurface and Stipe as specified	1	\$110,781.00	\$110,781.00	\$480,600.00	\$480,600.00	\$305,745.32	\$305,745.32
2								
#2-1	Sign Post installed with concrete footing	1	\$100.00	\$100.00	\$35.00	\$35.00	\$250.73	\$250.73
#2-2	12" X 18" .080 Aluminum Speed Bump Sign	1	\$65.00	\$65.00	\$50.00	\$50.00	\$276.75	\$276.75
#2-3	12" X 18" .080 Aluminum Handicap Parking Sign	1	\$65.00	\$65.00	\$50.00	\$50.00	\$276.75	\$276.75
#2-4	12" X 18" .080 Aluminum No Parking Sign	1	\$65.00	\$65.00	\$50.00	\$50.00	\$276.75	\$276.75
#2-5	12" X 18" .080 Aluminum Do Not Block Dumpsters sign	1	\$65.00	\$65.00	\$50.00	\$50.00	\$276.75	\$276.75
#2-6	Asphalt Speed Bump min. 18 in. wide, domed with a 3 in. max center height by 20 ft wide painted with federal yellow traffic paint	1	\$475.00	\$475.00	\$45.00	\$45.00	\$1,980.00	\$1,980.00
#2-7	10 Foot X 10 in W X 2-¼ in H Yellow Plastic Speed Bump Traffic Safety Store item SBP10S or equal	1	\$600.00	\$600.00	\$95.00	\$95.00	\$505.00	\$505.00
#2-8	Concrete Car Stops 7' Long x 6" High x 8" Wide, painted with Federal Yellow traffic paint	1	\$200.00	\$200.00	\$55.00	\$55.00	\$85.00	\$85.00
#2-9	Plastic Car Stop 6' Long x 4" High x 8" Wide, yellow	1	\$200.00	\$200.00	\$95.00	\$95.00	\$105.08	\$105.08
#2-10	Paint Curb Red and mark as Fire Lane-priced per linear foot	1	\$15.00	\$15.00	\$1.65	\$1.65	\$5.00	\$5.00
#2-11	Demo damaged concrete-priced per cubic yard	1	\$300.00	\$300.00	\$350.00	\$350.00	\$126.31	\$126.31
#2-12	Concrete repair using 3500psi mix-priced per cubic yard	1	\$600.00	\$600.00	\$135.00	\$135.00	\$261.19	\$261.19
	Notes:		No Bid Bond					

Advertisement List
Solicitation # 2109-5176
Solicitation Title: Repair and Resurfacing of Cross Creek Apts Parking Lot

Associations /Vendors	Contact Name	Email	Notes
Associations Revised as of 8/26/2020			
African American Chamber of Commerce of San Antonio	Lou Miller	blackchamber@aol.com	
Alamo Asian American Chamber of Commerce	Elva Adams	elva.adams@wellsfargo.com	
Alamo City Black Chamber Of Commerce	Bede Ramcharan	info@alamocitychamber.org	
American Council of Engineering Companies - San Antonio (ACEC-SA)	Anne Whittington	anne@acectx.org	
American Institute of Architects	Paula	paula@aiasa.org	
American Subcontractors Association	Jennifer Swinney	jennifer@asasanantonio.org	
Associated Builders and Contractors S. Texas Chapter	Steve Schultz	steve@abcsouthtexas.org	
Builders Exchange	Jeannette Olguin	jeannette@virtualbx.com	
Construct Connect		content@constructconnect.com	
CFMA		kimr@avacpa.com	
Construction Journal	Danielle Giammarino	DGiammarino@constructionjournal.com	
Fair Contracting Coalition		faircontractingcoalitioninfo@gmail.com	
Goodwill Industries	Steven Hussain Angelique de Oliveira	shussain@goodwill.sa.org adeoliveira@goodwillsa.org	
Greater San Antonio Builders Association	Kristi Sutterfield	ksutterfield@sabuilders.com	
The San Antonio Chamber of Commerce	Dave Petersen	dpetersen@sachamber.org	
Hispanic Contractors Association de San Antonio	Clarissa Perez Dave Sanchez	exdir@hcadesa.org admin@hcadesa.org dave@hcadesa.org	
Home Depot Pro Accounts	Darren Friesenhahn	Darren_Friesenhahn@homedepot.com	
IEC	Julie Howard	jhoward@iecsanantonio.com rvasquez@iecsanantonio.com	
MCA-SMACNA		mca-smacna@mca-smacna.org	
Minority Business Council	Hector Garcia	hector@hegarciacpa.com	
National Association of Women in Construction (NAWIC)	Sandee Morgan	nawicerin@gmail.com nawicsatx@gmail.com	
NAWBO San Antonio	Madeline Slay	Madeline@masarchitecture.com	
Plumbing Heating Cooling Contractors Association	Heidi Timble	Heidi@phcc-sanantonio.org	
Professional Engineers in Private Practice	Diane Hoskins	bexarpepp@sbcglobal.net	
Real Estate Council of San Antonio	Martha Mangum	martham@recsanantonio.com	

Advertisement List
Solicitation # 2109-5176

Solicitation Title: Repair and Resurfacing of Cross Creek Apts Parking Lot

SAABE	Melodie	mg.assoc.mgmt@gmail.com	
San Antonio Board of Realtors	Suzanne	Suzanne@sabor.com	
SA Chapter of the Associated General Contractors	Dana Marsh	sanantonioagc@gmail.com	
San Antonio Hispanic Chamber of Commerce	Brianna Dimas	briannad@sahcc.org mariyaf@sahcc.org	
San Antonio Masonry Contractors Association	Debbie Mason	thesamca@gmail.com	
San Antonio Women's Chamber of Commerce	Cindy Libera	admin@sawomenschamber.org	
SmartApartmentData.com		constructionadmin@smartlocating.com	
South Central Regional Certification Agency	Charles Johnson	cjohnson@sctrca.org	
South San Antonio Chamber of Commerce	Al Arreola Jr	al@southsa.org	
Southwest Minority Supplier Diversity Council	Robert Casas	smsdc@smsdc.org gabrielle@smsdc.org	
Surety Association of South Texas, Inc.	Jim Swindle	jim@alamobonds.com	
Texas Society of Professional Engineers		jennifer@tspe.org	
TIBH Industries	Robert Olivo	robertolivo@tibh.org	
UTSA Minority Business Development Agency	Orestes Hubbard Jennifer Mort Jacqueline Jackson	orestes.hubbard@utsa.edu jennifer.mort@utsa.edu Jacqueline.Jackson@utsa.edu	
UTSA Procurement Technical Assistance Center	Terri Williams	ptac@utsa.edu	
West San Antonio Chamber of Commerce	Julie Jimenez	info@westsachamber.org julie@westsachamber.org	
Women's Business Enterprise	Avery Smith	bids@wbea-texas.org	
NAHRO	Web Site	http://nahro.economicengine.com	
Public Purchase	Web Site	www.publicpurchase.com	
Texas ESBD	Web Site	https://portal.cpa.state.tx.us/	
North San Antonio Chamber of Commerce	Web Site	https://northsachamber.chambermaster.com	
Direct Solicits as of 06/09/21			
	HUBS on CMBL		
Ace Co	Betty Drennan	bettydrennan@acecosa.com,	
AJ Commercial Services, Inc.	Rafalita Avalos	ravalos@ajcommserv.com,	
Alamo 1	Joseph Salas	frontdesk@alamo1.com,	
All Pro General Construction,	Raul Scott Jorge Zapata	jorge@apgc.pro,	rejected
Empress Transport & Excavation	Rosa R Montoya	montoyarosar@yahoo.com,	
Fox Quality Concrete, Llc	Rey Lafuente	rey@foxqualityconcrete.com,	
Frank's Paving Company, Inc.	Ronnie Lopez	ronnie@frankspaving.com,	

Advertisement List
Solicitation # 2109-5176

Solicitation Title: Repair and Resurfacing of Cross Creek Apts Parking Lot

MLP Ventures Inc.	Liborio Perez	mlp@att.net,	
	Section 3 Bidders		
Jerdon Enterprise L.P.	Kathryn Tennell	kathryn@jerdonlp.com,	
Jarvis Moore Inc.	Jarvis Moore	jarvisdsd@gmail.com,	
TME Construction, L.L.C.	Ernesto Caro	tme1construction@gmail.com,	
Safe Co. Construction	Liz Janette Martinez	savecocorp@gmail.com,	
Geofill Material Technologies	Jack Karam	jpuente.geofill@outlook.com,	
TOGO Construction, LLC.	Dora Candia	info@togoconstructionllc.com,	
Cherokee Contracting	Jeffrey T. Mc Elroy	mmontgomery@cherokeeutilities.com,	
JAMCO Ventures, LLC.	Joe Muñiz	joe.muniz@jamcoventures.com,	
San Antonio Asphalt & Maintenance DBA Texas Asphalt & Maintenance	David Singh	TexasAsphalt@yahoo.com,	
Interstate Concrete & Steel Services	Florencio Robles	frobles@satx.rr.com,	
	Direct Solicits		
Abel's Paving & Construction,	Abel Garza Jr.	abelspaving@gmail.com,	
Ace Co	Betty Drennan	bettydrennan@acecosa.com,	
Acumen Enterprises, Inc.	Wayne Boyter	wayne@acumen-enterprises.com,	
Associated Construction Partners, Ltd.	Jillian R. Simpson	jill@acpartners.org,	
B.R. Services, Llc	Benjamin Brown	Bbrown@brsvc.com,	
Ballew Construction, Llc	A. Robert Ballew	ashleyrballew@yahoo.com,	
BCL&D Services	Paul McGregor	info@bclservicesllc.com,	
Bick's Construction, Inc.	MS. BICKEL	raeni12@gmail.com,	
Buckhorn Construction LLC	Marie Joyce Bishop	buckhornconstructionllc@gmail.com,	
Castle Enterprises, Llc	Linda S Castillo	linda.castleenterprises@gmail.com,	
Davila Paving, Llc	Jesse Davila	jesse@davilapaving.com,	
Frontier Paving & Construction, L.L.C.	Abraham Figueroa Jr	frontierpaving19@gmail.com,	
Gap Engineering Inc.	Mike Homma	mhomma@gap-eng.com,	
Geopolymer Concrete Solutions, Llc	Leon Hamilton	leonhamilton@icloud.com,	
GHR Concrete Inc	Paul Gonzales	katie@ghrconcrete.com,	
Hinds Paving	Desa Hinds	hindspaving@yahoo.com,	
Horizone Construction, 1 Ltd	Luis De Stefano	horizon.ada@gmail.com,	
International Eagle Enterpr	Corral Alfredo	EAGLEELPASO@YAHOO.COM,	
Jag Trucking Inc	Gilly Quiroz	jagtruckinginc@gmail.com,	
Janes Pavement Services, Inc.	Ella L. Janes	janesasphalt123@sbcglobal.net,	
Kocurek Land Improvement,	Amanda Kocurek	amanda@kliearthmovers.com,	
M2 Federal Inc.	Mike Scheiern	Mike.Scheiern@m2federal.com,	
Pate Jones Paving	Eddie Jones Jr.	patejonespaving@aol.com,	
Potere Construction Llc	Olga Sharon Douglas	sdouglas@potereconstruction.com,	

Advertisement List
Solicitation # 2109-5176

Solicitation Title: Repair and Resurfacing of Cross Creek Apts Parking Lot

R & R Paving, L.L.C.	Cynthia Gonzalez	rrpavingco@aol.com,	
Rapidhaul, L.L.C.	Marcos Ramirez	rapidhaul@yahoo.com,	
Rhyner Construction Services,	Stephanie Rhyner	Stephanie@RhynerInc.com,	
RM Walsdorf, Inc.	Kimberly Walsdorf	kim@rmwalsdorf.com,	
Sorrell Construction, Eqpmnt	Brookes Vandergriff	brookes@sorrelltx.com,	
Tamez-Pearson Construction	Noemi T Pearson	Tamezpearconstr@aol.com,	
Thompson Construction & Services Llc	Daniel J Thompson	Thompsonconserv@gmail.com,	
Total Commitment Construction	Pedro A Gutierrez	TOTALCOMMITMENTCONSTRUCTION@YAHOO.COM,	
Total Team Construction, Llc	Alejandro Yanez	ayanez@totalteamcons.com,	
Welch Excavation & Utility Co	Janis Lee Welch	welchexcavation@gmail.com,	
Tejas Premier	Andrew Wallace	Andrew@tejaspremierbc.com ,	
Double J Site Services	Martin Gonzalez	myinfo467@gmail.com,	
Express Road & Construction,	Kirt Tillman	kirt.tillman@gmail.com,	
Gallo Paving	David	david@gallopaving.com ,	
Yaba Group		fawarr@yahoo.com,	
All Brite Construction	Jan	jan@allbriteconstruction.com,	
Seyah Transportation LLC	B & J Transportation	h_jimmy@sbcglobal.net,	
Contractors Asphalt		info@contractorsasphalt.com,	
Pavecon		LLanglinais@pavecon.com,	
United Asphalt		Mario@1unitedasphalt.com,	
Proline Paving	M. Crawford	prolinepavement@aol.com,	
Alamo Asphalt Company		Alamoasphalt@sbcglobal.net,	
RDC Paving	Michael Medved	mike@rdcpaving.com,	
BK Paving Sealer Coating	James	jamesbkipaving@gmail.com,	
		bill@alltexpaving.com,	
All Tex Paving		sales@alltexpaving.com,	
Machado Paving & Sealcoating		machadopaving@yahoo.com,	
C & T Paving	Cody Acker	c.t.paving@hotmail.com,	
OSO Construction		service@osoconstructionsatx.com,	
Friesenhahn Paving		info@fpaving.com,	Not found
Spaw Glass	Jason & Justin	Jason.Hennesey@spawglass.com,	
Mission Asphalt	Web Site	justin.calvin@spawglass.com,	
		info@missionasphalt.com,	
Complete Maintenance Solutions	Web Site	wadelowman@cmstexas.com,	
		treylowman@cmstexas.com,	
Winco of South Texas	Donna Frodge	donna@wincotx.com,	
AJ Commercial Services	Rafalita Avalos	ravalos@ajcommserv.com,	
Elegant General Contractor	Amber	Amber@elegantgeneralcontractor.com,	Not found
Stalwart	Isiah Portillo	ip.stalwart@gmail.com,	
Successful Trucking & Paving	Martin Gonzalez	myinfo467@gmail.com,	
RDC Paving	Nahum Brown	nahum@rdcpaving.com,	Not found
Integrity Paving & Coatings	Holly S.	holly.s@integritypavingtexas.com,	
Holtz/Adams Construction	Elizabeth Spenser	betsy@holtzadamsconstruction.com,	

Advertisement List
Solicitation # 2109-5176
Solicitation Title: Repair and Resurfacing of Cross Creek Apts Parking Lot

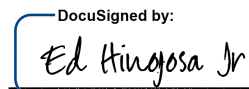
Message for web site contacts:

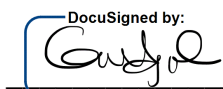
The San Antonio Housing Authority is requesting bids for the repair and resurfacing of the parking lot at the Lila Cockrell Apartments located at 3500 Pleasanton Road. Bid documents may be accessed through our E-Procurement portal on our website: <https://saha.bonfirehub.com/portal/?tab=openOpportunities>

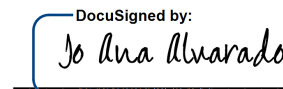
You will be required to register to download however; there is no charge to register.

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021****BOARD OF COMMISSIONERS
Operations and Real Estate Committee**

RESOLUTION 6194, AUTHORIZING THE AWARD OF A CONTRACT FOR THE BROADBAND INSTALLATION AND SERVICES PORTION OF THE WIFI EXPANSION PROJECT TO GET WIRELESS, INC. DBA DOJO NETWORKS FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO TWO ADDITIONAL ONE-YEAR TERMS FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$417,744.00 FOR YEAR ONE AND AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$323,994.00 FOR YEAR TWO AND FOR YEAR THREE

DocuSigned by:

 D7D46F73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 23FA86FCE5954A7...
George Ayala
Director of Procurement

DocuSigned by:

 4248C33558E34F7...
Jo Ana Alvarado
Director of Innovative Technology

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6194, authorizing the award of a contract for the broadband installation and services portion of the WiFi Expansion project to Get Wireless, Inc. DBA Dojo Networks for a period of one year with the option to renew up to two additional one-year terms for an annual cumulative amount not to exceed \$417,744.00 for year one and an annual cumulative amount not to exceed \$323,994.00 for year two and for year three.

FINANCIAL IMPACT:

The current award recommendation for the broadband installation and services portion of the WiFi Expansion Project is not expected to exceed an annual cumulative amount of \$417,744.00 for year one to include the cost for the equipment required for the installation and connectivity to the WiFi infrastructure and an annual cumulative amount of \$323,994.00 for year two and year three for delivery of bandwidth to meet the needs of Public Housing and Beacon Communities. The award recommendation for each year includes a 25% contingency that will only be used, if necessary. This project will be funded with operating reserves and MTW funds designated for the WiFi Expansion Project.

SUMMARY:

SAHA currently provides residents with Public Wireless access (WiFi) in the community rooms of the developments within the portfolios of Public Housing and Beacon Communities. This is accomplished through the use of enterprise-rated WiFi equipment and devices. As part of SAHA's ongoing efforts to bring internet access to all its residents, SAHA seeks to expand the community room WiFi to deliver Public Wireless (WiFi) access and connectivity to any device by saturating and distributing the signal with possible access from within the resident's home.

SAHA has awarded contracts for the WiFi equipment that is required to build the WiFi infrastructure and the cabling, mounting, and electrical portions of this project. SAHA requires both coax and fiber bandwidth installation to support the diverse Public Housing and Beacon

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

Communities portfolios.

SAHA received Board approval on August 5, 2021 (Resolution 6158) to award contracts to two vendors for broadband (bandwidth) installation and services. This approval included 19 fiber properties awarded to one vendor and 10 fiber and 40 coax properties awarded to a second vendor. On October 22, 2021, we received notification from the vendor awarded the 10 fiber and 40 coax properties of their intent to withdraw their response to the RFP. Therefore, SAHA is requesting approval to re-award this portion of the project to the next highest rated proposer, Get Wireless, Inc. DBA Dojo Networks.

Dojo Networks, a division of Get Wireless, Inc., began as an Internet service provider (ISP) in 1996. They are headquartered in State College, Pennsylvania. This vendor is a provider of high-speed data services to include bulk internet and managed WiFi, bulk video/TV services, access control and security systems, and smartphone apps for smart apartment control. Their focus is on providing its services to multi-dwelling units to include student housing, low income housing, senior housing, condominiums, multi-family housing, and HomeOwner Associations (HOAs). They have worked with the New York City Housing Authority.

CONTRACT OVERSIGHT:

Contract oversight will be provided by Jo Ana Alvarado, Director of Innovative Technology, who will monitor the vendor's adherence to contract requirements and performance. The Procurement Department will be responsible to monitor compliance with the vendor's Section 3 and SWMBE subcontractor good faith utilization plans.

RESIDENT-FOCUSED OUTCOMES:

SAHA residents have access to affordable utilities

ATTACHMENTS:

Resolution 6194

Scoring Matrix

Advertisement List

**San Antonio Housing Authority
Resolution 6194**

RESOLUTION 6194, AUTHORIZING THE AWARD OF A CONTRACT FOR THE BROADBAND INSTALLATION AND SERVICES PORTION OF THE WIFI EXPANSION PROJECT TO GET WIRELESS, INC. DBA DOJO NETWORKS FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO TWO ADDITIONAL ONE-YEAR TERMS FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$417,744.00 FOR YEAR ONE AND AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$323,994.00 FOR YEAR TWO AND FOR YEAR THREE

WHEREAS, SAHA received Board approval on August 5, 2021 (Resolution 6158) to award contracts to two vendors for broadband (bandwidth) installation and services. This approval included 19 fiber properties awarded to one vendor and 10 fiber and 40 coax properties awarded to a second vendor; and

WHEREAS, on October 22, 2021, we received notification from the vendor awarded the 10 fiber and 40 coax properties of their intent to withdraw their response to the RFP; and

WHEREAS, staff is requesting approval to re-award this portion of the project to the next highest rated proposer, Get Wireless, Inc. DBA Dojo Networks; and

WHEREAS, the current award recommendation for the broadband installation and services portion of the WiFi Expansion Project is not expected to exceed an annual cumulative amount of \$417,744.00 for year one to include the cost for the equipment required for the installation and connectivity to the WiFi infrastructure and an annual cumulative amount of \$323,994.00 for year two and year three for delivery of bandwidth to meet the needs of Public Housing and Beacon Communities. The award recommendation for each year includes a 25% contingency that will only be used, if necessary. This project will be funded with operating reserves and MTW funds designated for the WiFi Expansion Project; and

WHEREAS, staff requests the Board of Commissioners authorize the President and CEO, or designee, to execute all documents associated with this contract.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of San Antonio Housing Authority, hereby:

- 1) Approves Resolution 6194, authorizing the award of a contract for the broadband installation and services portion of the WiFi Expansion project to Get Wireless, Inc. DBA Dojo Networks for a period of one year with the option to renew up to two additional one-year terms for an annual cumulative amount not to exceed \$417,744.00 for year one and an annual cumulative amount not to exceed \$323,994.00 for year two and for year three.
- 2) Authorizes the President and CEO, or designee, to execute all necessary documents associated with this contract.

Passed and approved on the 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

Scoring Matrix

Broadband Installation & Services WiFi Expansion Project

2105-838-33-5130

Supplier	Total / 100 pts	Experience / 30 pts	Project / 35 pts	Price Proposal / 25 pts	Strength of the / 5 pts	Strength of the / 5 pts
	74.98	30	28	16.98	0	0
	81.00	28	28	25	0	0
	59.99	18	23.33	13.32	2.67	2.67

Advertisement List
Solicitation #2105-838-33-5130
Broadband Installation & Services WiFi Expansion Project


Associations /Vendors	Contact Name	Email	Notes
Direct Solicits as of 5/11/2021			
	HUBS on CMBL		
ARTCOM ASSOCIATES, INC.	Lori Ann Flores	accounting@artcomtx.com	210-684-8877
FIOSTA TECHNOLOGIES, LLC	Dave Cruz	bids@fiosta.com	210-816-3756
FIVE STAR TECH LTD. CO.	Katrina Greiner	kgreiner@fivestartechltd.com	210-468-0106
GLOBALSCOPE COMMUNICATIONS CORPORATION	Pres./Isabel Gonzaba	igonzaba@gscorp.com	210-321-3700
TERO TECHNOLOGIES, INC.	Robin Portenier	rlp@terousa.com	210-967-4900
	Section 3 Bidders		
		None	
	Direct Solicits		
AT&T		sc5467@att.com tm5462@att.com jh1394@att.com	
VIA Technologies	Manuel	manuelv@800viatech.com fmay@800viatech.com	
Spectrum Enterprises	Chad Scott	Chad.Scott@charter.com	
Grande Communications	Steven Davis	stephen.davis@mygrande.com	
Verizon Business Network Services,	Craig shinn	craig.shinn@verizon.com	
DoJo Networks		matthew.leff@dojonetworks.com	
Lumen		mark.strobel@lumen.com	
One 5 Solutions	Lou Martinez	lou@one5solutions.com	
Allot	Alain Amar	aamar@allot.com	
Consolidated Installation Support, LLC		joe@vetcis.com	210-387-0097
Barton Logistics	Austen Hardy	Austin.Hardy@bartonlogistics.com	
DoJo Networks		matthew.leff@dojonetworks.com	
Lakeway Security	Jesse	jesse@lakewaysecurity.com	
RX-Technology		sherik@rx-tech.com	


SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

**RESOLUTION 6189, APPROVING THE 2022 SMALL AREA FAIR MARKET RENT PAYMENT
 STANDARD SCHEDULE**

DocuSigned by:

 D7D46F73613F4FA...
Ed Hinojosa, Jr.
SAHA President and CEO

DocuSigned by:

 B00757B8288042A...
Brandee Perez
Chief Operating Officer

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6189, approving the 2022 Small Area Fair Market Rent (SAFMR) Payment Standard Schedule.

FINANCIAL IMPACT:

There is an estimated monthly impact on the current Annual Housing Assistance Payment Contract of \$593,108.00 or a 7.7% increase.

Table 1. Current and Proposed SAHA SAFMR Payment Standards Comparison

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR
2021 SAFMR Payment Standard Schedule (Current)							
Group 1	477	576	711	936	1134	1304	1474
Group 2	558	675	819	1062	1314	1511	1708
Group 3	594	711	873	1134	1404	1615	1825
Group 4	639	765	936	1233	1503	1728	1954
Group 5	729	873	1062	1377	1710	1967	2223
Group 6	756	909	1107	1440	1782	2049	2317
Group 7	783	936	1143	1503	1836	2111	2387
Group 8	846	1008	1233	1602	1980	2277	2574
Group 9	891	1071	1305	1692	2097	2412	2726
Group 10	972	1161	1431	1854	2295	2639	2984
2022 SAFMR Payment Standard Schedule (Proposed)							
Group 1	608	713	865	1112	1368	1573	1778
Group 2	642	756	917	1183	1460	1679	1898
Group 3	722	846	1026	1321	1625	1868	2112
Group 4	780	922	1117	1435	1772	2038	2303
Group 5	827	970	1180	1530	1900	2185	2470

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

Group 6	884	1045	1264	1625	2005	2305	2606
Group 7	941	1112	1349	1739	2140	2461	2782
Group 8	988	1159	1406	1815	2233	2567	2902
Group 9	1088	1278	1554	2000	2466	2836	3205
Group 10	1159	1368	1658	2138	2632	3026	3421

SUMMARY:

On November 16, 2016, the U.S. Department of Housing and Urban Development (HUD) published the Small Area Fair Market Rents (SAFMR) Final Rule, which provides that designated Public Housing Agencies (PHAs) will use SAFMRs to determine Housing Choice Voucher (HCV) payment standards in lieu of using the annually published Metropolitan Fair Market Rents (MAFMR) schedule. Payment standard is defined as “the maximum assistance payment for a family assisted in the voucher program (before deducting the total tenant payment by the family)” [24 CFR 982.4(b)]. HUD permits the housing authority to establish a payment standard amount for each unit size at any level between 90% and 110%—referred to as the “basic range”—of the FMR for the unit size [24 CFR 982.503(b)(1)(i)].

On January 17, 2018, HUD issued PIH Notice 2018-01 which required implementation of SAFMRs by April 1, 2018. SAHA submitted a waiver to HUD through SAHA’s FY2018-19 Moving to Work (MTW) Annual Plan requesting a delay in implementation for July 1, 2018. Using the MTW waiver, SAHA implemented SAFMRs through a Phase-In approach with two tiers of payment standards in Phase I effective July 1, 2018. This MTW activity also allows SAHA to set the payment standard outside of the 90 to 110% range. SAHA updated its payment standard schedule to ten zip code groups for Phase II effective January 1, 2020.

The proposed 2022 SAFMR Payment Standard Schedule, included in the table above, shows an increase in payment standards across all zip code groups and bedroom sizes. The increases vary by unit size from \$81.00 (Group 2, 1 BR) to \$479.00 (Group 9, 6BR). Staff believe that these increases are consistent with today’s current market trends and will expand housing opportunities for our families. With these increases, staff has estimated that a total of \$593,108.00 in additional Housing Assistance Payments will be paid out each month after full implementation.

The proposed payment standards for 2022 will be effective for all vouchers issued after January 1, 2022, and all recertifications with an effective date of March 1, 2022 or later.

STRATEGIC OUTCOME:

SAHA residents have a sufficient supply of affordable housing options.

ATTACHMENTS:

Resolution 6189
Presentation

**San Antonio Housing Authority
Resolution 6189**

RESOLUTION 6189, APPROVING THE 2022 SMALL AREA FAIR MARKET RENT PAYMENT STANDARD SCHEDULE

WHEREAS, the U.S. Department of Housing and Urban Development (HUD) annually establishes fair market rents (FMRs) for each area in the United States; and

WHEREAS, HUD requires SAHA to establish voucher payment standards for each unit size; and

WHEREAS, SAHA staff request authorization to establish the 2022 Small Area Fair Market (SAFMR) Payment Standard Schedule at the proposed amounts in order to ensure payment standards are compliant with federal regulations.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of San Antonio Housing Authority, hereby approves:

Resolution 6189, approving the 2022 SAFMR Payment Standard Schedule to be effective for all vouchers issued after January 1, 2022, and later and recertifications effective March 1, 2022 and later.

Table 1. Proposed 2021 SAFMR Payment Standards

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR
Group 1	608	713	865	1112	1368	1573	1778
Group 2	642	756	917	1183	1460	1679	1898
Group 3	722	846	1026	1321	1625	1868	2112
Group 4	780	922	1117	1435	1772	2038	2303
Group 5	827	970	1180	1530	1900	2185	2470
Group 6	884	1045	1264	1625	2005	2305	2606
Group 7	941	1112	1349	1739	2140	2461	2782
Group 8	988	1159	1406	1815	2233	2567	2902
Group 9	1088	1278	1554	2000	2466	2836	3205
Group 10	1159	1368	1658	2138	2632	3026	3421

Passed and approved the 2nd day of December 2021.

Ana M. “Cha” Guzman
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO



SAHA | SAN ANTONIO
HOUSING AUTHORITY
Opportunity Lives Here

2022 PROPOSED PAYMENT STANDARDS

November 18, 2021

2022 SMALL AREA FAIR MARKET RENT (SAFMR) PAYMENT STANDARDS

BACKGROUND

Payment Standards

3

- SAHA is an SAFMR-designated PHA, meaning required to use **Small Area Fair Market Rent (SAFMR)** to determine Housing Choice Voucher (HCV) payment standards
- **Payment Standard:** The maximum subsidy for a family assisted in the voucher program (before deducting the total tenant payment by the family)

BACKGROUND

SAFMR Policy

4

- Using MTW Activity FY 2019-01, SAHA implemented SAFMRs through a phase-in approach with **two tiers of payment standards** effective July 1, 2018
- SAHA updated its payment standard schedule to **10 zip code groups** for Phase II effective January 1, 2020
- The proposed 2022 Payment Standard Schedule will be effective for all **vouchers issued after January 1, 2022 and later** and **recertifications effective March 1, 2022 and later**

2022 SAFMR PAYMENT STANDARDS

5

	0 BR	1 BR	2 BR	3 BR	4 BR	5BR	6BR
Current Payment Standards							
Group 1	477	576	711	936	1134	1304	1474
Group 10	972	1161	1431	1854	2295	2639	2984
2022 Proposed Payment Standards							
Group 1	608	713	865	1112	1368	1573	1778
Group 10	1159	1368	1658	2138	2632	3026	3421

FINANCIAL IMPACT

6

- There is an estimated monthly impact on the current Annual Housing Assistance Payment Contract of **\$593,108.00** or a **7.7% increase**

PROPOSED 2022 PROJECT-BASED VOUCHER (PBV) PAYMENT STANDARDS

BACKGROUND

Project-Based Voucher MTW Exceptions

8

- In November 2016, the Small Area Fair Market Rent (SAFMR) Final Rule (Federal Register Notice FR-5855-F-03) mandated certain metropolitan areas, including the San Antonio-New Braunfels metro area, to use SAFMRs in the Housing Choice Voucher (HCV) program
- The Final Rule **provided an exception for project-based vouchers**, allowing PHAs the option to apply SAFMRs to PBV developments. **SAHA elected not to apply SAFMRs to PBV developments**

2022 PBV PAYMENT STANDARDS

9

	0 BR	1 BR	2 BR	3 BR	4 BR	5BR	6BR
Current Payment Standards							
YR 2021	685	821	1003	1301	1614	1856	2098
Proposed Payment Standards							
YR 2022	734	865	1049	1350	1664	1913	2164

FINANCIAL IMPACT

10

- There is an estimated impact on the current Annual Housing Assistance Payment Contract of **\$22,854.00 or a 9.9% increase**

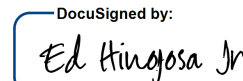
QUESTIONS?

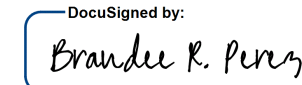
SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTION 6190, APPROVING THE PAYMENT STANDARD SCHEDULE AT 90% OF FAIR MARKET RENTS FOR THE PROJECT-BASED VOUCHER PROGRAM

DocuSigned by:

 D7D46F73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 B0075768288042A...
Brandee Perez
Chief Operating Officer

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6190, approving the Payment Standard Schedule at 90% of Fair Market Rents (FMRs) for the Project-Based Voucher (PBV) Program.

FINANCIAL IMPACT:

There is an estimated impact on the current Annual Housing Assistance Payment Contract of \$22,854.00 or a 9.9% increase.

Table 1. SAHA Payment Standard and HUD Fair Market Rent Comparison

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR
2022 Payment Standard Schedule (Proposed)	734	865	1049	1350	1664	1913	2164
2022 HUD Fair Market Rents	815	961	1165	1500	1849	2126	2404
Percentage of FMR	90%	90%	90%	90%	90%	90%	90%
2021 Proposed Payment Standard Schedule (Current)	685	821	1003	1301	1614	1856	2098
2021 HUD Fair Market Rents	761	912	1114	1446	1793	2062	2331
Percentage of FMR	90%	90%	90%	90%	90%	90%	90%

SUMMARY:

The U.S. Department of Housing and Urban Development (HUD) publishes Fair Market Rents (FMRs) annually for each area of the United States and requires each housing authority to adopt a payment standard schedule for each FMR area in its jurisdiction. Payment standard is defined as “the maximum assistance payment for a family assisted in the voucher program (before deducting the total tenant payment by the family)” [24 CFR 982.4(b)]. HUD permits the housing authority to establish a payment standard amount for each unit size at any level between 90% and 110%—referred to as the “basic range”—of the FMR for the unit size [24 CFR 982.503(b)(1)(i)].

In November 2016, the Small Area Fair Market Rent (SAFMR) Final Rule (Federal Register Notice FR-5855-F-03) mandated certain metropolitan areas, including the San Antonio-New Braunfels metro area, to use SAFMRs in the Housing Choice Voucher (HCV) program. The Final Rule provided an exception for project-based vouchers, allowing PHAs the option to apply SAFMRs to PBV developments. SAHA elected not to apply SAFMRs to PBV developments.

SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

In August 2021, HUD published the 2022 FMRs. HUD allows housing authorities to establish the payment standard amounts at any level between 90% and 110% of the published FMR. The 2022 FMRs represent an across-the-board increase for the San Antonio-New Braunfels Metropolitan Statistical Area (MSA). Staff believe that these increases are consistent with today's current market trends and will expand the housing opportunities for our program participants.

The proposed payment standards for 2022 will be effective for all vouchers issued after January 1, 2022, and all recertifications with an effective date of March 1, 2022 or later.

STRATEGIC OUTCOME:

SAHA residents have a sufficient supply of affordable housing options.

ATTACHMENTS:

Resolution 6190

**San Antonio Housing Authority
Resolution 6190**

RESOLUTION 6190, APPROVING THE PAYMENT STANDARD SCHEDULE AT 90% OF FAIR MARKET RENTS FOR THE PROJECT-BASED VOUCHER PROGRAM

WHEREAS, the U.S. Department of Housing and Urban Development (HUD) annually establishes fair market rents (FMRs) for each area in the United States; and

WHEREAS, HUD requires the Public Housing Authority to establish voucher payment standards for each unit size; and

WHEREAS, SAHA staff request authorization to establish payment standards at 90% of the 2022 FMR schedule, in order to ensure the current payment standard schedule is compliant with federal regulations.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of San Antonio Housing Authority, hereby approves:

Resolution 6190, approving the Payment Standard Schedule at 90% of Fair Market Rents (FMRs) for the Project-Based Voucher (PBV) Program

Table 1. SAHA Payment Standard and HUD Fair Market Rent Comparison

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR
2022 Proposed Payment Standard Schedule	734	865	1049	1350	1664	1913	2164
2022 HUD Fair Market Rents	815	961	1165	1500	1849	2126	2404
Percentage of FMR	90%	90%	90%	90%	90%	90%	90%

Passed and approved on the 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Commissioners

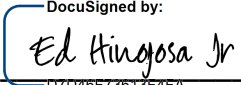
Attested and approved as to form:

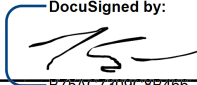
Ed Hinojosa, Jr.
President and CEO

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTIONS 6195 AND 21FIN-11-18, AUTHORIZING APPROVAL OF THE SALE OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS PROJECT (F/K/A ROSEMONT AT PLEASANTON), DEFEASANCE AND PAYMENT OF THE OUTSTANDING BONDS ISSUED BY THE SAN ANTONIO HOUSING FINANCE CORPORATION, THE ASSIGNMENT AND ASSUMPTION OF THE REGULATORY AGREEMENT AND SUBSEQUENT TERMINATION THEREOF UPON THE TERMINATION OF THE QUALIFIED PROJECT PERIOD, AND AUTHORIZING A CONSENT AND ASSUMPTION AGREEMENT, A TERMINATION AGREEMENT AND A DEFEASANCE AGREEMENT AND OTHER MATTERS IN CONNECTION THEREWITH

DocuSigned by:

 D7D46F73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 B75AC7309C8B466...
Timothy E. Alcott
Chief Real Estate and Asset
Management Officer

REQUESTED ACTION:

Consideration and appropriate action regarding Resolutions 6195 and 21FIN-11-18, authorizing approval of the sale of the Rosemont at University Park Apartments (f/k/a Rosemont at Pleasanton), defeasance and payment of the outstanding bonds issued by the San Antonio Housing Finance Corporation, the assignment and assumption of the Regulatory Agreement and subsequent termination thereof upon the termination of the Qualified Project Period, and authorizing a Consent and Assumption Agreement, a Termination Agreement and a Defeasance Agreement, and other matters in connection therewith.

FINANCIAL IMPACT:

The Corporation will earn a \$2,500.00 fee in connection with the defeasance of the bonds. Once the bonds have been paid, this will allow for the project to be refinanced using tax credits and tax exempt bonds, which will allow for Las Varas Public Facility Corporation ("LVPFC") to earn an issuer fee and other fees associated with its participation in the new project.

SUMMARY:

All other required SAHA entities have previously approved this transaction, but the Corporation needs to approve the conveyance and defeasance of the Bonds in order to move this Project forward.

The Rosemont at University Park Apartments (f/k/a Rosemont at Pleasanton Apartments) are set to be sold in January and the Corporation's consent is required for the sale to go through. This is because it issued bonds in 2005 to fund the project and at the time of issuance, it entered into a Regulatory Agreement assuring that the project would have low income set-a-sides for 15 years after the bonds were issued and setting forth other obligations that remain in place so long as the bonds are outstanding. This Regulatory Agreement requires (i) the Corporation's consent to sell the project, (ii) the new owner of the project to agree to assume the obligations of the Borrower under the Regulatory Agreement and (iii) the termination and release of the Regulatory Agreement upon the termination of the Qualified Project Period.

The Rosemont at University Park Apartments are located at 102 Emerald Ash, San Antonio, Texas 78221. This is a 240-unit complex which is being sold to Fairfield Residential, which are experienced operators of affordable projects. The purchaser will acquire the project and will enter into a partnership with LVPFC to raise equity through the sale of low income housing tax credits to fund the rehabilitation of the Project. The new partnership will own and operate the project, which has committed to reserving 15% of the units for residents earning at or below 30% AMI and the remaining 85% of the units for residents earning at or below 60% AMI.

STRATEGIC OUTCOME:

Strategically preserve the supply of quality affordable housing.

ATTACHMENTS:

Resolution 6195

Resolution 21FIN-11-18

**CERTIFICATE FOR RESOLUTION
RESOLUTION 6195**

The undersigned officer of the Housing Authority of the City of San Antonio, Texas a housing authority created pursuant to the laws of the State of Texas ("SAHA") hereby certifies as follows:

1. In accordance with its bylaws, the Board of Commissioners of SAHA (the "Board") held a meeting on December 2, 2021, (the "Meeting") of the duly constituted officers and members of the Board, at which a duly constituted quorum was present. Whereupon among other business transacted at the Meeting, a written

RESOLUTION 6195, AUTHORIZING THE SAN ANTONIO HOUSING FINANCE CORPORATION TO APPROVE RESOLUTION 21FIN-11-18 AUTHORIZING APPROVAL OF THE SALE OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS PROJECT (F/K/A ROSEMONT AT PLEASANTON), DEFEASANCE AND PAYMENT OF THE OUTSTANDING BONDS ISSUED BY THE SAN ANTONIO HOUSING FINANCE CORPORATION, THE ASSIGNMENT AND ASSUMPTION OF THE REGULATORY AGREEMENT AND SUBSEQUENT TERMINATION THEREOF UPON THE TERMINATION OF THE QUALIFIED PROJECT PERIOD, AND AUTHORIZING A CONSENT AND ASSUMPTION AGREEMENT, A TERMINATION AGREEMENT AND A DEFEASANCE AGREEMENT AND OTHER MATTERS IN CONNECTION THEREWITH

(the "Resolution") was duly introduced for the consideration of the Board and discussed. It was then duly moved and seconded that the Resolution be adopted; and, after due discussion, said motion, carrying with it the adoption of the Resolution, prevailed and carried by a majority vote of the Board.

2. A true, full, and correct copy of the Resolution adopted at the Meeting is attached to and follows this Certificate; the Resolution has been duly recorded in the Board's minutes of the Meeting; each of the officers and members of the Board was duly and sufficiently notified officially and personally, in advance, of the time, place, and purpose of the Meeting; and the Meeting was held and conducted in accordance with the Bylaws of SAHA.

SIGNED and SEALED on this 2nd day of December 2021.



Ed Hinojosa, Jr.
President and CEO

**San Antonio Housing Authority
Resolution 6195**

RESOLUTION 6195, AUTHORIZING THE SAN ANTONIO HOUSING FINANCE CORPORATION TO APPROVE RESOLUTION 21FIN-11-18 AUTHORIZING APPROVAL OF THE SALE OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS PROJECT (F/K/A ROSEMONT AT PLEASANTON), DEFEASANCE AND PAYMENT OF THE OUTSTANDING BONDS ISSUED BY THE SAN ANTONIO HOUSING FINANCE CORPORATION, THE ASSIGNMENT AND ASSUMPTION OF THE REGULATORY AGREEMENT AND SUBSEQUENT TERMINATION THEREOF UPON THE TERMINATION OF THE QUALIFIED PROJECT PERIOD, AND AUTHORIZING A CONSENT AND ASSUMPTION AGREEMENT, A TERMINATION AGREEMENT AND A DEFEASANCE AGREEMENT AND OTHER MATTERS IN CONNECTION THEREWITH

WHEREAS, one of the strategic goals of Housing Authority of the City of San Antonio, Texas (“SAHA”) is to preserve the supply of quality affordable housing; and

WHEREAS, a principal financing mechanism for preserving and rehabilitating affordable housing is the 4% low income housing tax credit (“Tax Credits”); and

WHEREAS, the SAHA Staff has previously proposed, and the SAHA Board of Commissioners has previously approved the acquisition and inducement of the Rosemont at University Park Apartments rehabilitation project (the “Project”) using Tax Credits; and

WHEREAS, the San Antonio Housing Finance Corporation (the “Issuer”), issued private activity bonds (the “Bonds”), which remain outstanding and unpaid in full, and the Bonds were used to finance the original construction of the Rosemont at University Park Apartments (the “Apartments”); and

WHEREAS, in connection with the Bonds, an Amended and Restated Regulatory Agreement and Declaration of Restrictive Covenants (the “Regulatory Agreement”) was entered into between the Issuer and TX Pleasanton Housing, L.P. (the “Current Owner”), as the current owner of the Apartments; and

WHEREAS, the Current Owner proposes to sell the Apartments to Las Varas Public Facility Corporation or an affiliate thereof; and

WHEREAS, the Regulatory Agreement requires (i) the Issuer’s consent to sell the Apartments, (ii) the new owner of the Apartments to agree to assume the obligations of the Borrower under the Regulatory Agreement and (iii) the termination and release of the Regulatory Agreement upon the termination of the Qualified Project Period (as defined in the Regulatory Agreement); and

WHEREAS, the Board has determined that it is in the public interest and to the benefit of the citizens and residents of San Antonio for the various entities to enter into the transactions described above so that the Partnership may undertake the Project; and

WHEREAS, this Board of Commissioners has reviewed the foregoing and determined that the action herein authorized is in furtherance of the public purposes of SAHA; and

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of San Antonio Housing Authority, hereby approves:

Section 1. The officers of SAHA and the Issuer, or any of them, are authorized to take any and all action necessary to carry out and consummate the transactions described in or contemplated by the documents approved hereby or otherwise to give effect to the actions authorized hereby and the intent hereof.

Section 2. If any section, paragraph, clause, or provisions of this Resolution shall be held to be invalid or unenforceable, the invalidity or unenforceability of such section, paragraph, clause or provision shall not affect any of the remaining provisions of this Resolution.

Section 3. The recitals contained in the preamble hereof are hereby found to be true, and such recitals are hereby made a part of this Resolution for all purposes and are adopted as a part of the judgment and findings of the Board.

Section 4. All resolutions, or parts thereof, which are in conflict or inconsistent with any provision of this Resolution are hereby repealed to the extent of such conflict, and the provisions of this Resolution shall be and remain controlling as to the matters resolved herein.

Section 5. This Resolution shall be construed and enforced in accordance with the laws of the State of Texas and the United States of America.

Section 6. This Resolution shall be in force and effect from and after its passage.

Section 7.

Passed and approved this 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

EXHIBIT A

DESCRIPTION OF THE LAND

BEING ALL OF LOT 2 AND LOT 3, NEW CITY BLOCK 11151, CITY OF SAN ANTONIO, TEXAS, ROSEMONT AT UNIVERSITY PARK, VOLUME 9564, PAGE 99 OF THE DEED AND PLAT RECORDS OF BEXAR COUNTY, TEXAS.

EXHIBIT B

NOTICE OF CONFIDENTIALITY RIGHTS: IF YOU ARE A NATURAL PERSON, YOU MAY REMOVE OR STRIKE ANY OR ALL OF THE FOLLOWING INFORMATION FROM ANY INSTRUMENT THAT TRANSFERS AN INTEREST IN REAL PROPERTY BEFORE IT IS FILED FOR RECORD IN THE PUBLIC RECORDS: YOUR SOCIAL SECURITY NUMBER OR YOUR DRIVER'S LICENSE NUMBER.

Prepared by, and after recording
return to:

**TERMINATION OF
REGULATORY AGREEMENT AND
DECLARATION OF RESTRICTIVE COVENANTS
(Rosemont at University Park (f/k/a Rosemont at Pleasanton Apartments Project))**

Dated as of _____.

For consideration paid, the undersigned, being the parties to that certain Amended and Restated Regulatory Agreement and Declaration of Restrictive Covenants dated as of April 24, 2008, executed by San Antonio Housing Finance Corporation, a non-profit housing finance corporation organized and existing under the laws of Texas, U.S. Bank National Association, a national banking association organized and existing under the laws of the United States of America, as trustee, and TX Pleasanton Housing, L.P., a Texas limited partnership, as borrower, filed for record on May 6, 2008 in the Official Public Records of Bexar County, Texas, as Document No. 20080094532, such instrument affecting the property legally described on Exhibit A attached hereto, hereby acknowledge and agree that such instrument is released and terminated and shall be of no further force or effect.

[THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK;
SIGNATURE AND ACKNOWLEDGMENT PAGE FOLLOWS]

The foregoing instrument was acknowledged before me this ____ day of _____, 20__, by Ed Hinojosa, Jr., the Secretary/Treasurer of San Antonio Housing Finance Corporation.

Notarial Stamp or Seal (Or Other Title or Rank)	Signature of Person Taking Acknowledgment
-------------------------------------------------	-------------------------------------------

	U.S. BANK NATIONAL ASSOCIATION
	By: _____
	Name: _____
	Its: _____

STATE OF _____)
) ss.
COUNTY OF _____)

The foregoing instrument was acknowledged before me this _____ day of _____, 20__ by _____, the _____ of U.S. Bank National Association.

Notarial Stamp or Seal (Or Other Title or Rank)		_____
		Signature of Person Taking Acknowledgment

The foregoing instrument was acknowledged before me this _____ day of _____, 20____, by Ed Hinojosa, Jr., Secretary/Treasurer of Las Varas Public Facility Corporation, the sole member of TX Pleasanton Development, L.L.C., the general partner of TX Pleasanton Housing, L.P.

Notarial Stamp or Seal (Or Other Title or Rank)	Signature of Person Taking Acknowledgment
-------------------------------------------------	-------------------------------------------

EXHIBIT C DEFEASANCE AGREEMENT

This Defeasance Agreement dated _____, 20__ (this "Agreement") is among the **SAN ANTONIO HOUSING FINANCE CORPORATION**, a Texas non-profit housing finance corporation (the "Issuer"), **TX PLEASANTON HOUSING, L.P.**, an Ohio limited liability company] (the "Current Owner"), [_____] a [_____] (the "New Owner") and [_____] a national banking association with trust powers, as escrow agent hereunder (the "Escrow Bank").

WHEREAS, definitions in the Indenture are incorporated herein by reference, except to the extent terms are otherwise expressly defined herein;

WHEREAS, pursuant to Chapter 394, Texas Local Government Code, as amended (the "Act"), and a Trust Indenture dated as of January 1, 2005, by the Issuer and U.S. Bank National Association (the "Trustee") as amended and supplemented by the First Supplemental Indenture to Trust Indenture dated as of April 24, 2008 (collectively, the "Indenture"), the Issuer authorized the issuance and sale of its San Antonio Housing Finance Corporation Multifamily Housing Revenue Bonds (Rosemont at Pleasanton Apartments Project) Series 2005, which are currently outstanding in the aggregate principal amount of \$[_____] and stated to mature on [_____] (the "Bonds");

WHEREAS, the Bonds were used to finance the acquisition, construction and equipping of the Project, which is owned by TX Pleasanton Housing, L.P., a Texas limited partnership (the "Partnership");

WHEREAS, the Current Owner is selling its interest in the Project to the New Owner;

WHEREAS, the New Owner will deposit an upfront payment directly with [_____] (the "Title Company") sufficient to enable it to acquire the Current Owner's interest in the Project and the Current Owner will be deemed to make a deposit sufficient to defease the Bonds;

WHEREAS, a portion of the proceeds of the sale of the Current Owner's interest in the Project will be used to effectuate (1) the defeasance of the Bonds on [_____] 20__ in accordance with Article [___] of the Indenture and (2) the redemption of the Bonds on [_____] (the "Redemption Date") in accordance with Article IV of the Indenture;

WHEREAS, on the date hereof, the New Owner will deposit or cause to be deposited with the Title Company at least \$[_____] which amount shall constitute a portion of the sales price of the Current Owner's interest in the Project;

WHEREAS, the Current Owner and the Issuer have made instructions and provisions:

A. for the redemption of all of the Bonds on the Redemption Date and for notice of such redemption to be provided by the Trustee in accordance with the requirements of the Indenture and this Agreement;

B. for the deposit in the Escrow Account (as defined below) of money in an aggregate amount, without investment, sufficient to pay in full on the Redemption Date

the principal of, premium, and interest on the Bonds (the “Bond Requirements”) in accordance with the Indenture; and

C. for the execution and delivery of this Agreement;

WHEREAS, attached hereto as Exhibit 1 and made a part hereof is a true, complete, and correct copy of the schedule of the Bond Requirements;

WHEREAS, it is the intention and agreement of the Current Owner, the New Owner, and the Issuer that all right, title, and interest in and to the hereinafter described Escrow Deposit and other properties and assets in the Escrow Account shall be transferred to, held by, and vested in the Escrow Bank in trust and for the benefit of those persons specified below by and on the terms of this Agreement, and that neither the Current Owner, the New Owner, the Issuer, nor any creditor of any of the Current Owner, the New Owner, or the Issuer shall be able to rescind or revoke or have access to the trust created hereby or obtain access to, control over, or title to the assets dedicated to satisfy the Current Owner’s, the New Owner’s, or the Issuer’s obligations in respect of the Bonds or any other obligations;

WHEREAS, the Escrow Bank is empowered to undertake the obligations and commitments on its part herein set forth, and the undersigned officer of the Escrow Bank is duly authorized to execute and deliver this Agreement in the Escrow Bank’s name and on its behalf;

WHEREAS, the Issuer is empowered to undertake the obligations and commitments on its part herein set forth, and the undersigned officer of the Issuer is duly authorized to execute and deliver this Agreement in the Issuer’s name and on its behalf; and

WHEREAS, the Current Owner and the Issuer are empowered to undertake the obligations and commitments on their part herein set forth, and the undersigned officers of the Current Owner and the Issuer are duly authorized to execute and deliver this Agreement in the name and on behalf of the Current Owner and the Escrow Bank.

NOW, THEREFORE, THIS AGREEMENT WITNESSETH:

In consideration of the mutual agreements herein contained, and in order to secure the payment on the Redemption Date of the Bond Requirements, the parties hereto mutually undertake, promise, and agree for themselves, and their respective representatives, successors, and assigns, as follows:

Creation of Escrow; Notices of Defeasance.

The sequence of actions shall occur as follows:

On October [___], 2021, the New Owner will transfer the amount of \$[_____] to the Title Company as the sales price of the Current Owner’s interest in the Project (the “Sales Price”);

On October [___], 2021 the Title Company will transfer a portion of the Sales Price in the amount of \$[_____] to the Escrow Bank which will be deposited to the

Escrow Account (defined below) and applied by the Escrow Bank to defease the Bonds (the “Escrow Deposit”);

Pursuant to and in accordance with this Agreement, the Escrow Bank shall invest the Escrow Deposit in the Escrow Account in the securities shown on Exhibit 2, which will be sufficient together with the earnings on the securities to effectuate the defeasance of the Bonds on the date hereof.

The Trustee has received a verification report of Robert Thomas, Certified Public Accountant, which certifies to the sufficiency of the Escrow Deposit to defease the Bonds and effectuate the redemption of the Bonds on the Redemption Date and that using the proceeds of the Escrow Securities will be sufficient to defease the Bonds on [_____] and effectuate the Redemption of the Bonds on the Redemption Date (the “Verification Report”).

Bond Counsel has delivered to the Issuer and the Trustee the opinions required by Article X of the Indenture.

The Escrow Bank shall cause the Escrow Deposit to be credited to and accounted for in the separate trust account hereby created, to be held by the Escrow Bank in trust for the equal and ratable benefit of the registered owners of the Bonds, until set aside or delivered to the Trustee on the Redemption Date as required by and in accordance with the Indenture, and which account is designated as the “San Antonio Housing Finance Corporation Multifamily Housing Revenue Bonds (Rosemont at Pleasanton Apartments Project) Escrow Account” (the “Escrow Account”).

Upon the purchase of the Escrow Securities, any balance above \$[_____] (\$[_____] escrow securities cost plus \$[_____] in cash) shall be paid to the Current Owner and the Escrow Securities shall become the new Escrow Deposit.

The Current Owner, the New Owner and the Issuer (to the extent of any interest any of them may have) hereby transfer to the Escrow Bank all of their right, title, and interest in and to the Escrow Deposit and other properties and assets in or credited to the Escrow Account, and the same shall be held by and are vested in the Escrow Bank in trust and for the benefit of those persons specified herein, and neither the Current Owner, the New Owner or the Issuer, nor any creditor of the Current Owner, the New Owner or the Issuer shall be able to rescind or revoke or have access to the Escrow Account and trust created hereby or obtain access to, control over or title to the assets dedicated to and held in or credited to the Escrow Account to satisfy the Current Owner’s, the New Owner’s or the Issuer’s obligations in respect of the Bonds, or any other obligation. To the extent any agreement or provision of law states or implies that the Current Owner, the New Owner or the Issuer retains any title to such assets, the Current Owner, the New Owner and the Issuer hereby disclaim such title.

The Escrow Bank, by execution and delivery of this Agreement, acknowledges receipt of the Escrow Deposit in an amount sufficient to effectuate the defeasance of the Bonds on the date hereof.

By their execution and acknowledgment of this Agreement, the Escrow Bank and the Trustee, confirm that they will make the transfers described in paragraph A above.

The Issuer, the Current Owner, the New Owner and the Escrow Bank agree and acknowledge that the trust established herein is irrevocable.

Purpose of Escrow.

The Escrow Bank shall hold the Escrow Deposit and the Escrow Account in trust for the benefit of the registered owners of the Bonds (as applicable) and to make and to secure payment on the Redemption Date of the Bond Requirements for the Bonds. All cash in the Escrow Account is hereby irrevocably delivered, pledged, and held in trust for the payment of the Bond Requirements on the Redemption Date, subject only to the other provisions hereof.

The Issuer and the Current Owner shall continue to cooperate with the Escrow Bank as may be required under the Indenture to cause the redemption and payment of the Bonds when due and called for redemption.

Accounting for Escrow. The money accounted for in or credited to the Escrow Account shall not be subject to checks drawn by the Current Owner, the New Owner, or the Issuer or otherwise subject to the Current Owner's order except as otherwise provided in and subject to the limitations in Section 5.

No Investments or Reinvestments. The Escrow Bank shall have no right or obligation by virtue of this Agreement, general trust law, or otherwise to make any investment or reinvestment of any money in the Escrow Account at any time.

Sufficiency of Escrow; Transfer of Excess Amounts. The Escrow Deposit held in the Escrow Account is in an amount which at all times is sufficient to pay the Bond Requirements on the Redemption Date for the Bonds, all as evidenced by the Verification Report. If any of the Escrow Deposit remains in the Escrow Account following payment in full of the Bond Requirements, title to such funds shall thereupon vest in the Current Owner, and such funds shall be promptly transferred by the Escrow Bank to, or at the written direction of, the Current Owner.

Redemption of Bonds—Notice of Redemption. Pursuant to the Indenture, the Issuer, on behalf of the Current Owner, hereby provides irrevocable written notice to the Trustee to call the Bonds for early redemption on the Redemption Date and the Trustee hereby agrees to provide timely notice of optional redemption of the Bonds on the Redemption Date. Such notice of redemption is attached hereto as Exhibit 4.

Termination of Escrow Account. When all transfers hereunder have been completed as to the Escrow Account, the Escrow Bank shall terminate the Escrow Account.

Fees and Costs.

On the date hereof, the Current Owner shall cause to be paid by a wire transfer from the Title Company to [] as a fee for performing the services hereunder as both [Escrow Bank and Trustee], all expenses incurred or to be incurred by the Escrow Bank in the administration of this Agreement and for any and all remaining fees owed for services rendered

as Trustee under the Indenture, including legal fees related thereto, the sum of \$[_____], the sufficiency of which is hereby acknowledged by the Escrow Bank and Trustee. In the event that the Escrow Bank is requested to perform any extraordinary services hereunder, the Current Owner hereby agrees to pay reasonable fees to the Escrow Bank for such extraordinary services and to reimburse the Escrow Bank for all expenses incurred by the Escrow Bank in performing such extraordinary services, and the Escrow Bank hereby agrees to look only to the Current Owner for the payment of such fees and reimbursement of such expenses. The Escrow Bank hereby agrees that in no event shall it ever assert any claim or lien against the Escrow Account for any fees for its services, whether regular or extraordinary, as Escrow Bank, or in any other capacity, or for reimbursement for any of its expenses.

[On the date hereof, the Current Owner shall cause to be paid by a wire transfer from the Title Company to the Issuer a transfer of ownership fee in the amount of \$[1,500.00], which amount is in addition to the funds required to be paid to the Escrow Bank described in Section 1 above.]

Possible Deficiencies. If at any time the money in the Escrow Account will not be sufficient to make all required payments on the Redemption Date for the Bonds, the Escrow Bank shall notify the Current Owner in writing as soon as reasonably practicable of such fact and the amount of such deficiency. Thereupon the Current Owner shall forthwith (but in all events by the Redemption Date) deposit with the Escrow Bank for deposit in the Escrow Account such funds as may be required. The Escrow Bank shall not be responsible for the Current Owner's failure to make any such deposit.

Excess Funds of the Indenture. Upon receipt of the funds described in Sections 1 and 8 above, all amounts due and owed under Articles IV and X of the Indenture required to defease the Bonds and effectuate a redemption of the Bonds on the Redemption Date shall have been received and applied by the Trustee and all remaining funds held under the Indenture shall be deemed as excess funds and released to the Current Owner.

Character of Deposit.

Except as provided in Section 1.A(7) above, the Escrow Deposit and all money in or credited to the Escrow Account from time to time shall be held in trust by the Escrow Bank for the equal and ratable benefit of the registered owners of the Bonds.

The Escrow Bank shall hold the Escrow Deposit and all money in or credited to the Escrow Account as a special trust fund and account for the benefit of the registered owners of the Bonds (in accordance with Section 1.C) separate and wholly segregated from all other securities and funds of the Escrow Bank or deposited therein and shall never commingle such money with other securities or money.

Securing Deposit. No money paid into and accounted for in the Escrow Account shall ever be considered as a banking deposit, and neither the Escrow Bank nor any such trust bank shall have any right or title with respect thereto.

No Amendment. This Agreement is irrevocable. This Agreement is not subject to amendment except by a writing signed by the Current Owner, the New Owner, the Escrow Bank,

and the Issuer, and acknowledged by the Trustee; provided that no amendment shall revoke or shall affect the irrevocability of this Agreement.

Exculpatory Provisions.

The liability of the Escrow Bank to transfer funds for the payment of the principal of and interest on the Bonds shall be limited to the cash balances from time to time on deposit in the Escrow Account. Notwithstanding any provision contained herein to the contrary, neither the New Owner, the Escrow Bank, the Trustee, nor the Paying Agent for the Bonds shall have any liability whatsoever for the insufficiency of funds from time to time in the Escrow Account not caused by the Escrow Agent's, the Trustee's, or the Paying Agent's gross negligence or willful misconduct, except for the obligation to notify the Current Owner as promptly as practicable of any such occurrence upon obtaining actual knowledge thereof.

The recitals herein shall be taken as the statements of the Issuer, the Current Owner and the New Owner and shall not be considered as made by, or imposing any obligation or liability upon, the Escrow Bank. The Escrow Bank was not a party to the proceedings authorizing the Bonds and is not responsible for nor bound by any of the provisions thereof (except as the successor Trustee and Paying Agent). In its capacity as Escrow Bank, it is agreed that the Escrow Bank need look only to the terms and provisions of this Agreement.

The Escrow Bank makes no representations as to the value, conditions, or sufficiency of the Escrow Account, or any part thereof, or as to the title of any entity thereto, or as to the security afforded thereby or hereby, and the Escrow Bank shall not incur any liability or responsibility in respect to any of such matters.

It is the intention of the parties hereto that the Escrow Bank shall never be required to use or advance its own funds or otherwise incur personal financial liability in the performance of any of its duties or the exercise of any of its rights and powers hereunder.

The Escrow Bank shall not be liable for any action taken or neglected to be taken by it in good faith in any exercise of reasonable care and believed by it to be within the discretion or power conferred upon it by this Agreement, nor shall the Escrow Bank be responsible for the consequences of any error of judgment; and the Escrow Bank shall not be answerable except for its own action, neglect or default, nor for any loss unless the same shall have been through its gross negligence or willful misconduct.

Unless it is specifically otherwise provided herein, the Escrow Bank has no duty to determine or inquire into the happening or occurrence of any event or contingency or the performance or failure of performance of the Current Owner with respect to arrangements or contracts with others, with the Escrow Bank's sole duty hereunder being to safeguard the Escrow Account, to dispose of and deliver the same in accordance with this Agreement. If, however, the Escrow Bank is called upon by the terms of this Agreement to determine the occurrence of any event or contingency, the Escrow Bank shall be obligated, in making such determination, only to exercise reasonable care and diligence, and in event of error in making such determination the Escrow Bank shall be liable only for its own willful misconduct or its gross negligence. In determining the occurrence of any such event or contingency the Escrow Bank may request from the Current Owner or any other person such reasonable additional evidence on which it is

entitled to rely to determine any fact relating to the occurrence of such event or contingency, and in this connection may make inquiries of, and consult with, among others, the Current Owner at any time.

The Escrow Bank shall not be liable for the performance of any duties, except such duties as are specifically set forth in this Escrow Agreement, and no implied covenants or obligations shall be read into this Escrow Agreement. Nothing herein contained shall relieve the Escrow Bank from liability for its own grossly negligent action, grossly negligent failure to act, or willful misconduct, except that this sentence shall not be construed to limit the effect of the immediately preceding sentence. The Escrow Bank shall not incur any liability for any error of judgment, unless it shall be proved that it was grossly negligent in ascertaining the pertinent facts. The Escrow Bank shall be protected in relying and acting upon any notice, resolution, request, consent, order, certificate, report, opinion, bond, or other paper or document believed by it to be genuine, and to have been signed or presented by the proper party or parties. The Escrow Bank may consult with counsel, and the opinion of such counsel shall be full and complete authorization and protection in respect of any action taken or suffered by it in good faith and in accordance therewith.

The Escrow Bank may rely conclusively upon the truth, completeness, and accuracy of the statements, certificates, opinions, resolutions, and other documents conforming to the requirements of this Escrow Agreement and shall not be obligated to make any independent investigation with respect thereto.

TO THE FULL EXTENT PERMITTED BY LAW, THE CURRENT OWNER AGREES TO INDEMNIFY, DEFEND, AND HOLD THE ESCROW BANK HARMLESS FROM AND AGAINST ANY AND ALL LOSS, DAMAGE, TAX, LIABILITY, AND EXPENSE THAT MAY BE INCURRED BY THE ESCROW BANK AS A RESULT OF ANY THIRD PARTY CLAIM ARISING OUT OF OR IN CONNECTION WITH ITS ACCEPTANCE OR APPOINTMENT AS ESCROW BANK HEREUNDER, INCLUDING REASONABLE ATTORNEYS' FEES AND EXPENSES OF DEFENDING ITSELF AGAINST ANY CLAIM OR LIABILITY IN CONNECTION WITH ITS PERFORMANCE HEREUNDER EXCEPT THAT THE ESCROW BANK SHALL NOT BE INDEMNIFIED FOR ANY LOSS, DAMAGE, TAX, LIABILITY, OR EXPENSE RESULTING FROM ITS OWN GROSS NEGLIGENCE, WILLFUL MISCONDUCT, OR MATERIAL BREACH OF THIS AGREEMENT.

Time of Essence. Time is of the essence in the performance of the obligations from time to time imposed upon the Escrow Bank by this Agreement.

Successors.

Whenever in this Agreement the Current Owner, the New Owner, the Issuer, the Escrow Bank, or the Trustee is named or is referred to, such provision is deemed to include any successor of the Current Owner, the New Owner, the Issuer, the Escrow Bank, or the Trustee, respectively, immediate or intermediate, whether so expressed or not.

All of the stipulations, obligations and agreements by or on behalf of and other provisions for the benefit of the Current Owner, the Issuer, the Escrow Bank, or the Trustee contained in this Agreement

shall bind and inure to the benefit of any such successor, and

shall bind and inure to the benefit of any officer, board, authority, agent, or instrumentality to whom or to which there shall be transferred by or in accordance with law any relevant right, power or duty of the Current Owner, the Issuer, the Escrow Bank, or the Trustee, respectively, or of its successor.

Notwithstanding any other provision of this Agreement, neither the Current Owner nor the Issuer may assign or otherwise transfer any of its obligations hereunder, other than to a successor. Except as expressly permitted in Section 19, the Escrow Bank shall have no right to assign or transfer its obligations hereunder.

Severability. If any section, paragraph, clause, or provision of this Agreement shall for any reason be held to be invalid or unenforceable, the invalidity or unenforceability of such section, paragraph, clause, or provision shall not affect any of the remaining provisions of this Agreement.

Counterparts. This Agreement may be executed in multiple counterparts.

Successor Escrow Bank.

If at any time the Escrow Bank or its legal successor or successors should become unable, through operation of law or otherwise, to act as Escrow Bank hereunder, or if its property and affairs shall be taken under the control of any state or federal court or administrative body because of insolvency or bankruptcy or for any other reason a vacancy shall forthwith exist in the office of Escrow Bank hereunder, the Issuer, by appropriate action, promptly shall appoint a successor Escrow Bank to fill such vacancy. If no successor Escrow Bank shall have been appointed by the Issuer within thirty (30) days, a successor may be appointed by the owners of a majority in principal amount of the Bonds then Outstanding by an instrument or instruments in writing filed with the Issuer, signed by such owners or by their duly authorized attorneys-in-fact. If, in a proper case, no appointment of a successor Escrow Bank shall be made pursuant to the foregoing provisions of this Section within forty-five (45) days after a vacancy shall have occurred, the owner of any Bonds may apply to any court of competent jurisdiction to appoint a successor Escrow Bank. Such court may thereupon, after such notice, if any, as it may deem proper, prescribe and appoint a successor Escrow Bank.

The Escrow Bank may at any time resign and be discharged from its duties hereunder by giving not less than thirty (30) days' written notice to the Issuer; provided, that, no such resignation shall take effect unless (i) a successor Escrow Bank shall have been appointed by the owners of the Bonds or by the Issuer as herein provided; (ii) such successor Escrow Bank shall have accepted such appointment; and (iii) the successor Escrow Bank shall have entered into a separate arrangement with the Current Owner with respect to its fees. Such resignation shall take effect immediately upon compliance with the foregoing requirements.

Any successor Escrow Bank shall be an entity qualified to serve as Trustee under the Indenture.

Any successor Escrow Bank shall execute, acknowledge, and deliver to the Issuer and the Escrow Bank an instrument accepting such appointment hereunder, and the Escrow Bank shall execute and deliver an instrument transferring to such successor Escrow Bank, subject to the

terms of this Agreement, all the rights, powers, and trusts of the Escrow Bank hereunder. Upon the request of any such successor Escrow Bank, the Issuer shall execute any and all instruments in writing for more fully and certainly vesting in and confirming to such successor Escrow Bank all such rights, powers, and duties. The Escrow Bank shall pay over to its successor Escrow Bank a proportional part of the Escrow Bank’s fee paid to the Escrow Bank pursuant to Section 9.

Any entity into which the Escrow Bank may be merged or converted or with which it may be consolidated or any entity resulting from any merger, conversion, or consolidation to which the Escrow Bank shall be a party, or any entity to which all or substantially all of the corporate trust business of the Escrow Bank may be sold or otherwise transferred, shall be the successor Escrow Bank hereunder without any further act.

Termination of Documents and Liens and Assignment of Rents. Upon the funding of the Escrow Account and defeasance of the Bonds as described in Section 1 hereof and the payment of all fees due and owed to the Trustee as described in Section 8 hereof, any and all estates, liens, interests, and rights, including specifically the assignment of rents to the Trustee, established under the Indenture, the Loan Agreement, the Regulatory Agreement, the Mortgage, and any other document related to Bonds establishing a lien on the Trust Estate and the Project for benefit of the holders of the Bonds shall be terminated and all rights, title, and interest in the Project, including specifically the rights to all rents of the Project, shall vest in the New Owner in accordance with terms of the purchase and sale agreement between the Current Owner and the New Owner.

Notices.

Any notice, authorization, request, or demand required or permitted to be given hereunder, shall be in writing and shall be deemed to have been duly given when mailed by registered or certified mail, postage prepaid, addressed as follows:

- To the Escrow Bank: [_____]
- To the Issuer: San Antonio Housing Finance Corporation
818 South Flores
San Antonio, Texas 78204
Attention: Ed Hinojosa, Jr., Secretary/Treasurer
- To the Current Owner: [_____]
- To the New Owner [_____] [_____] [_____] [_____]

The United States Post Office registered or certified mail receipt showing delivery of the aforesaid shall be conclusive evidence of the date and fact of delivery. Either party hereto may change the address to which notices are to be delivered by giving to the other party not less than ten (10) days prior notice thereof.

Texas Law Governs. This Agreement shall be governed exclusively by the provisions hereof and by the applicable laws of the State of Texas.

Third-Party Beneficiary. [_____], as Paying Agent for the Bonds, is a third-party beneficiary of this Agreement.

[The remainder of this page intentionally left blank.]

IN WITNESS WHEREOF, the Issuer, the Current Owner the Escrow Bank have caused this Agreement to be signed in their respective corporate names by their respective authorized officers, all as of the day and year first above written.

ISSUER:

SAN ANTONIO HOUSING FINANCE CORPORATION, a Texas nonprofit housing finance corporation

By: _____

Name: Ed Hinojosa, Jr.

Title: Secretary/Treasurer

CURRENT OWNER:

TX PLEASANTON HOUSING, L.P., a Texas limited partnership

By: _____

Name:

Title:

NEW OWNER:

[_____] , a [_____]

By: _____

Name:

Title:

ESCROW BANK:

[_____]

By: _____

Authorized Officer

Acknowledged:

U.S. BANK NATIONAL ASSOCIATION, as the
Trustee

By: _____
Authorized Officer

Exhibit 1

BOND REQUIREMENTS

Date	Delinquent Principal (\$)	Principal (\$)	Delinquent Interest (\$)	Interest (\$)	Total (\$)
[_____]	[_____]	[_____ _____]	[_____ _____]	[_____ _____]	[_____]

Exhibit 2

ESCROW SECURITIES

Exhibit 3**NOTICE OF DEFEASANCE**

**SAN ANTONIO HOUSING FINANCE CORPORATION
MULTIFAMILY HOUSING REVENUE BONDS
(ROSEMONT AT PLEASANTON APARTMENTS PROJECT) SERIES 2005**

CUSIP NO: _____¹**DATE OF ISSUE:****BOND DATE:****INTEREST RATE: %****STATED MATURITY DATE:**

NOTICE IS HEREBY GIVEN that, pursuant to the Trust Indenture dated as of January 1, 2005 (the "Indenture"), between San Antonio Housing Finance Corporation (the "Issuer") and U.S. Bank National Association, as trustee (the "Trustee"), on [____], 20__, 100% of the outstanding principal amount of the referenced securities (the "Bonds") were defeased pursuant to a Defeasance Agreement dated as of [____], 2021 among the Issuer, TX Pleasanton Housing, L.P., a Texas limited liability company, [____], a [____], and [____] as Escrow Bank.

If you have any questions, please contact:

[_____]
[_____]
[_____]

SAN ANTONIO HOUSING FINANCE CORPORATION

By: **U.S. Bank National Association,**
as Trustee

Dated _____, 2021

¹ The CUSIP number is included solely for the convenience of the Holders. Neither the Issuer nor the Trustee shall be responsible for the selection or the use of the CUSIP numbers, nor is any representation made as to their correctness on the securities or as indicated in any redemption notice.

Exhibit 4

NOTICE OF REDEMPTION IN WHOLE

**SAN ANTONIO HOUSING FINANCE CORPORATION
MULTIFAMILY HOUSING REVENUE BONDS
(ROSEMONT AT PLEASANTON APARTMENTS PROJECT) SERIES 2005**

CUSIP NO: ²
DATE OF ISSUE:
BOND DATE:
INTEREST RATE: %
STATED MATURITY DATE:

NOTICE IS HEREBY GIVEN that, pursuant to the Trust Indenture dated as of January 1, 2005 (the "Indenture"), between San Antonio Housing Finance Corporation (the "Issuer") and U.S. Bank National Association, as trustee (the "Trustee"), as amended and supplemented by that First Supplemental Indenture to Trust Indenture dated April 24, 2008 (collectively, the "Indenture"), 100% of the outstanding principal amount of the referenced securities will be redeemed on [_____] (the "Redemption Date") at a price of 100%, plus accrued and unpaid interest to the Redemption Date (the "Redemption Price"). On the Redemption Date, the Redemption Price will become due, and, unless the Trustee fails to receive sufficient funds to pay the Redemption Price, interest will no longer accrue on such principal amount from and after the Redemption Date.

To receive payment of principal of, premium, and interest on these Bonds, you must present your certificate(s) to us on or prior to the Redemption Date. The certificates should be delivered to the following addressee:

U.S. Bank National Association [Address]

IMPORTANT TAX INFORMATION

[Under the Jobs and Growth Tax Relief Reconciliation Act of 2003, paying agents are required to withhold 31% of gross payments to bondholders who fail to provide a valid taxpayer identification number on or before the date upon which bonds are presented for payment. Bondholders are additionally subject to a penalty of \$50 for failure to provide such number. Please provide a taxpayer identification number when presenting bonds for redemption. To avoid this 31% withholding, please submit, with your securities, a form W-9.]

If you have any questions, please contact Bondholder Services at [_____].

² The CUSIP number is included solely for the convenience of the Holders. Neither the Issuer nor the Trustee shall be responsible for the selection or the use of the CUSIP numbers, nor is any representation made as to their correctness on the securities or as indicated in any redemption notice.

SAN ANTONIO HOUSING FINANCE CORPORATION

By: **U.S. Bank National Association**

as Trustee

Dated _____, 2021

If by mail:

U.S. Bank National Association

[_____]

[_____]

[_____]

If by hand or overnight mail:

U.S. Bank National Association

[_____]

[_____]

[_____]

**CERTIFICATE FOR RESOLUTION
RESOLUTION 21FIN-11-18**

The undersigned officer of the San Antonio Housing Finance Corporation (the “Issuer”) hereby certifies as follows:

In accordance with the bylaws of the Issuer, the Board of Directors of the Issuer (the “Board”) held a meeting on December 2, 2021 (the “Meeting”) of the duly constituted officers and members of the Board, at which a duly constituted quorum was present. Whereupon among other business transacted at the Meeting, a written

RESOLUTION 21FIN-11-18, AUTHORIZING APPROVAL OF THE SALE OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS PROJECT (F/K/A ROSEMONT AT PLEASANTON), DEFEASANCE AND PAYMENT OF THE OUTSTANDING BONDS ISSUED BY THE SAN ANTONIO HOUSING FINANCE CORPORATION, THE ASSIGNMENT AND ASSUMPTION OF THE REGULATORY AGREEMENT AND SUBSEQUENT TERMINATION THEREOF UPON THE TERMINATION OF THE QUALIFIED PROJECT PERIOD, AND AUTHORIZING A CONSENT AND ASSUMPTION AGREEMENT, A TERMINATION AGREEMENT AND A DEFEASANCE AGREEMENT AND OTHER MATTERS IN CONNECTION THEREWITH

(the “Resolution”) was duly introduced for the consideration of the Board and discussed. It was then duly moved and seconded that the Resolution be adopted; and, after due discussion, said motion, carrying with it the adoption of the Resolution, prevailed and carried by a majority vote of the Board.

A true, full, and correct copy of the Resolution adopted at the Meeting is attached to and follows this Certificate; the Resolution has been duly recorded in the Board’s minutes of the Meeting; each of the officers and members of the Board was duly and sufficiently notified officially and personally, in advance, of the time, place, and purpose of the Meeting; and the Meeting was held and conducted in accordance with the Articles of Incorporation and the Bylaws of the Issuer.

SIGNED the 2nd day of December 2021.

Ed Hinojosa, Jr.
Secretary/Treasurer

**San Antonio Housing Finance Corporation
Resolution 21FIN-11-18**

RESOLUTION 21FIN-11-18, AUTHORIZING APPROVAL OF THE SALE OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS PROJECT (F/K/A ROSEMONT AT PLEASANTON), DEFEASANCE AND PAYMENT OF THE OUTSTANDING BONDS ISSUED BY THE SAN ANTONIO HOUSING FINANCE CORPORATION, THE ASSIGNMENT AND ASSUMPTION OF THE REGULATORY AGREEMENT AND SUBSEQUENT TERMINATION THEREOF UPON THE TERMINATION OF THE QUALIFIED PROJECT PERIOD, AND AUTHORIZING A CONSENT AND ASSUMPTION AGREEMENT, A TERMINATION AGREEMENT AND A DEFEASANCE AGREEMENT AND OTHER MATTERS IN CONNECTION THEREWITH

WHEREAS, the City Council of the City of San Antonio, Texas (the “City”), has, pursuant to the Texas Housing Finance Corporations Act, Chapter 394, Texas Local Government Code, as amended (the “Act”), approved and created the San Antonio Housing Finance Corporation, a nonstock, nonprofit housing finance corporation (the “Issuer”); and

WHEREAS, the Issuer, on behalf of the City, is empowered to finance the costs of residential ownership and development that will provide decent, safe, and sanitary housing at affordable prices for residents of the City by the issuance of housing revenue bonds; and

WHEREAS, the Issuer has previously issued its Multifamily Housing Revenue Bonds (Rosemont at Pleasanton Apartments Project) Series 2005 (the “Bonds”) pursuant to a Trust Indenture dated as of January 1, 2005 between the Issuer and U.S. Bank National Association, a national banking association (the “Trustee”), as amended and Supplemented by that certain First Supplemental Indenture to Trust Indenture made as of April 24, 2008 (collectively, the “Indenture”), to finance the development of the Rosemont at University Park Apartments Project (f/k/a Rosemont at Pleasanton) (the “Project”); and

WHEREAS, TX Pleasanton Housing, L.P. (the “Current Owner”) will transfer the Project to a third party purchaser (the “New Owner”); and

WHEREAS, the Issuer entered into a Regulatory Agreement and Declaration of Restrictive Covenants dated as of January 1, 2005, regarding the Project, as amended and restated in its entirety by that certain Amended and Restated Regulatory Agreement and Declaration of Restrictive Covenants dated as of April 24, 2008 (the “Regulatory Agreement”), which requires the consent of the Issuer to convey the Project; and

WHEREAS, there has been presented to the Board of Directors of the Corporation (the “Board”) a Consent to Sale and Assumption Agreement regarding the conveyance from the Current Owner to the New Owner (in substantially the form attached hereto as Exhibit A) (the “Consent Agreement”) to be entered into by the Corporation, the Current Owner and the New Owner; and

WHEREAS, the Regulatory Agreement provides that it shall be terminated at the end of the Qualified Project Period (as defined in the Regulatory Agreement); and

WHEREAS, there has been presented to the Board a Termination of Regulatory Agreement and Declaration of Restrictive Covenants (in substantially the form attached hereto as Exhibit B) (the

“Termination Agreement”); and

WHEREAS, there has been presented to the Board a Defeasance Agreement regarding the payment in full and defeasance of the Bonds (in substantially the form attached hereto as Exhibit C) (the “Defeasance Agreement”) to be entered into by the Corporation, the Current Owner and the Trustee; and

WHEREAS, the Issuer consents to the sale of the Project, the defeasance and payment of the Bonds, the termination of the Regulatory Agreement upon the termination of the Qualified Project Period; and

WHEREAS, the Board has determined that it is in the public interest and to the benefit of the citizens and residents of the City for the various entities to enter into the transactions described above.

NOW, THEREFORE, BE IT RESOLVED BY the Board of Directors of the San Antonio Housing Finance Corporation, hereby:

The Corporation hereby grants its consent to and authorizes the sale and transfer of the Project by the Current Owner to the New Owner, and in connection therewith, the payment and defeasance of the Bonds, and approves the Consent Agreement and the Defeasance Agreement (collectively, the “Agreements”) in substantially the forms attached hereto, conditioned upon the receipt of all other required consents and other matters required by the Regulatory Agreement, with such consent and approval effective as of the date hereof, but with such documents to be dated the date of the sale.

The Board authorizes the President, Vice President, Secretary/Treasurer or any Assistant Secretary/Treasurer of the Board to execute the Agreements, and to take any and all actions and execute any and all documents necessary to cause the transactions described herein to occur.

The Board authorizes the President, Vice President, Secretary/Treasurer or any Assistant Secretary/Treasurer of the Board to execute the Termination Agreement upon the expiration of the Qualified Project Period.

The recitals contained in the preamble hereof are hereby found to be true, and such recitals are hereby made a part of this Resolution for all purposes and are adopted as a part of the judgment and findings of the Board.

All resolutions, or parts thereof, which are in conflict or inconsistent with any provision of this Resolution are hereby repealed to the extent of such conflict, and the provisions of this Resolution shall be and remain controlling as to the matters resolved herein.

If any provision of this Resolution or the application thereof to any person or circumstance shall be held to be invalid, the remainder of this Resolution and the application of such provision to other persons and circumstances shall nevertheless be valid, and the Board hereby declares that this Resolution would have been enacted without such invalid provision.

This Resolution shall be construed and enforced in accordance with the laws of the State

of Texas and the United States of America.

This Resolution shall be in force and effect from and after its passage.

Passed and approved the 2nd day of December 2021.

Ana M. "Cha" Guzman
Chair, Board of Directors

Attested and approved as to form:

Ed Hinojosa, Jr.
Secretary/Treasurer



RECRUITMENT UPDATE

Fiscal Year Activity: July 1, 2021 - November 1, 2021

Agenda

2

- Summary FY 20-21 and YTD FY 21-22
- Department Activity - FY 21-22
- Promotions / Interim / Working Out of Class
- Temporary Status Employees

Summary FY 20-21 and YTD FY 21-22

3

	FY 20-21 07/01/20 to 06/30/21	FY 21-22 07/01/21 to 11/01/21
FT Headcount On 07/01	452	518
Budgeted Positions	635	656
Variance	183	131
New Hires	154	55
Departures	88	48
Net Additions	66	7
Budget Vacancies	117	131

Summary FY 20-21 and YTD FY 21-22

4

	FY 20-21 07/01/20 to 06/30/21	FY 21-22 07/01/21 to 11/01/21
Budget Vacancies	117	131
Positions On Hold	33	42
Budget Vacancies	84	89
Temp Status, WOCs, PreScreen	32	40
Actual Vacancies	52	49

Total FT Staff By Department

07/01/2021 through 11/01/2021

5

TOTALS FOR THE PERIOD 07/01/2021 through 11/01/2021													
Department	FT HC ON 07/01/2021	FT HIRES	TRANSFERS IN	TRANSFERS OUT	Add C&D	FT TERMS	CURRENT FT HC	BUDGETED FT	BUDGET VARIANCE	HOLDS	TEMP/WOC OR PRE-HIRE	BUDGET VACANCIES	
Public Housing	206	18	2	-5	221	-22	199	232	33	0	13	20	
Assisted Housing Programs	78	7	3	-1	87	-12	75	92	17	1	8	8	
Beacon	85	17	2	0	104	-5	99	156	57	34	11	12	
Community Development Initiatives	43	7	0	-1	49	-6	43	55	12	1	7	4	
Construction	12	1	0	0	13	-1	12	14	2	1	0	1	
DSNR	8	0	0	-1	7	0	7	9	2	1	0	1	
Policy And Planning	4	0	0	0	4	0	4	4	0	0	0	0	
Public Affairs	6	1	0	0	7	0	7	7	0	0	0	0	
Security	3	0	0	-1	2	0	2	3	1	0	1	0	
Asset Management	2	1	1	0	4	0	4	4	0	0	0	0	
Executive	8	0	1	0	9	-1	8	9	1	1	0	0	
Finance and Accounting	20	1	0	-1	20	0	20	24	4	3	0	1	
General Services	6	0	1	-1	6	-1	5	6	1	0	0	1	
Human Resources	9	0	0	0	9	0	9	9	0	0	0	0	
Innovative Technology	9	2	0	0	11	0	11	12	1	0	0	1	
Internal Audit	4	0	1	0	5	0	5	5	0	0	0	0	
Legal	2	0	0	0	2	0	2	2	0	0	0	0	
Procurement	7	0	0	0	7	0	7	7	0	0	0	0	
Regulatory Oversight	4	0	0	0	4	0	4	4	0	0	0	0	
Risk Management	2	0	0	0	2	0	2	2	0	0	0	0	
TOTAL	518	55	11	-11	573	-48	525	656	131	42	40	49	

Recruitment Actions - 07/01/2021 to 11/01/2021

6

Promotions

- 22 Formal Promotions
- 1 Current Working Out of Class (WOC)

Temporary Status Activity

-  20 Temporary Status to Full Time Hires
-  60 Total Temporary Assignments - Filled To Date
-  30 Active Temporary Status Employees

QUESTIONS?

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021****MEMORANDUM**

To: Operations and Real Estate Committee

From: Ed Hinojosa, Jr., President and CEO

Presented by: Richard Milk, Planning Officer

RE: Update and discussion regarding the FY2021 MTW Report and FY2020 MTW Compliance Determination

DS
EHJ

SUMMARY:

The U.S. Department of Housing and Urban Development (HUD) requires Moving to Work (MTW) Public Housing Authorities (PHAs) to annually submit an MTW Report detailing progress on MTW activities and other items. SAHA submitted the latest MTW Report on September 30, 2021, to cover fiscal year 2021. In addition, SAHA received the final MTW Compliance Determination for the FY2020 MTW Baseline. This memo summarizes the key points.

FY 2019-2020 Final HUD Compliance Determination

Per *PIH-2013-02 Baseline Methodology for Moving to Work Public Housing Agencies*, HUD coordinates with SAHA to complete final compliance determinations for the statutory requirement, Maintain Number of Households Served. On August 31, 2021, HUD notified SAHA that the Agency was fully Compliant at 101% of its baseline for FY 2019-2020. This final compliance determination was expected and is consistent with internal compliance analysis and tracking.

FY 2020-2021 Internal Compliance Analysis and Tracking

HUD uses the MTW Report, in addition to data in other HUD systems, to determine SAHA's statutory compliance with MTW requirements. The MTW Report indicates that SAHA anticipates compliance with those requirements. Below are internal compliance analysis and tracking figures pending HUD's final review and acceptance:

- Serve at least 75% Low Income Households
 - 98% of households served are below 50% AMI
- Maintain Number of Households Served
 - 17,971 Served (100% of 17,950 adjusted baseline)
- Maintain proportions of Households Served by Household Size
 - Change within 3%, for all household sizes

Outcomes by Statutory Objective

SAHA has implemented many activities under the three MTW Statutory Objectives. The following summary lists how many MTW activities are underway under each Objective, and also highlights cumulative outcomes across all MTW households and portfolios.

- Cost Efficiency: Six ongoing activities
 - From 2013-2021, SAHA estimates \$4.5 million in cost efficiencies, due to MTW Activities
- Housing Choice: Seven ongoing activities

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

- From 2014-2021, 874 new units at 5 properties have been made possible, due to MTW Activities. Of those units, 88% are affordable to Low Income Households.
- In 2021, 56% of new admissions and existing voucher holders moved to targeted SAFMR groups 4-10.
- Education, Employment, and Self-Sufficiency: Three ongoing activities and several MTW-funded initiatives
 - MTW Self-Sufficiency Activities are new pilots working with small populations.

MTW Activities

MTW Activities are efforts that require a regulatory waiver from HUD, secured through the MTW Plan process. At the end of FY2021, SAHA closed four activities and managed sixteen MTW Activities. The following breaks down each activity by status:

- Eleven activities are “On Track” and meeting or exceeding most benchmarks
 1. 11-1e- Preservation and Expansion of Affordable Housing
 2. 13-4- HQS Inspection of SAHA-owned non-profits by SAHA inspectors
 3. 14-3- Faster Implementation of Payment Standard Decreases (HCV)
 4. 14-6- HCV Rent Reform
 5. 15-2- Elderly Admissions Preference at Select Public Housing Sites
 6. 15-3- Modified Project Based Vouchers
 7. 19-1- Local Implementation of Small Area FMRs
 8. 19-2- Alternative Recertification Process
 9. 20-3- Family Self Sufficiency (FSS) Program Streamlining
 10. 21-2 - Limiting increase in rents
 11. 15-1- MDRC / HUD Rent Study
- Four activities are “Behind Plan” and not meeting some benchmarks, but are of low concern
 1. 11-9- Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services
 2. 13-2- Simplified Earned Income Disregard (S-EID) (Public Housing)
 3. 20-1- Palo Alto College, College Homeless Assistance Program
 4. 20-4- Time-Limited Workforce Housing Pilot Program (PBV)
 5. 21-1- Next Step Housing Program (THRU Project)
- Four activities were closed out
 1. 14-2- Early Engagement
 2. 17-1- Thrive in Five
 3. 17-2- Restorative Housing Pilot Program
 4. 20-2- St. Phillips College Homeless Program (SPC-HP)

MTW Initiatives: Overview

MTW Initiatives are efforts that use only the MTW single fund flexibility (no waiver required). The following table lists SAHA's use of MTW fund flexibility in FY2021:

Projects	Uses as of 6/30/2021
Community Development Initiatives	\$ 1,438,829.00
Public Housing Operating Loss	\$973,614.00
Capital Planning	\$359,742.00

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

Expansion of Public Housing WiFi	\$451,993.00
Development Activities:	
East Meadows Development	\$668,629.00
Legacy at Alazan	(\$52,510.00)
100 Labor Multi-Family Development	\$3,786,280.00
Rosemont at Highland Park	\$1,000,000.00
Costa Valencia	\$328,284.00
Total	\$ 8,954,861.00

Uses identified in this schedule are outside of the operating cost of the Section 8, Public Housing, and CFP programs, which comprise our MTW block grant.

MTW Initiatives: Details

1. Community Development Initiatives: The Agency uses MTW funds to support the Community Development Initiatives Department for MTW program administration and implementation. These funds allow the Agency to provide higher quality supportive services to residents than would otherwise be permitted by grant funding alone. In addition, the Agency is able to more effectively engage with partners and leverage resources for the benefit of the residents. Detailed below is more information on specific uses and programs.
 - Case Management Software: MTW funds were used to procure a new case management software, Apricot.
 - Food Distributions: MTW funds were used to assist with food distributions as a result of the ongoing pandemic and in response to Winter Storm Uri.
 - Community Resources Team: MTW funds were used to support the reorganization of the Community Development Initiatives Department to include a community resources team.
 - Jobs Plus Program: MTW funds were used in addition to grant funds to support the administration of the Jobs Plus Program at Cassiano Homes. The Jobs Plus program helps residents receive training and find employment opportunities. SAHA partners with Alamo Workforce Solutions to identify in-demand occupations, as well as employers willing to provide training or educational assistance.
 - Resident Ambassador: MTW funds also support the Resident Ambassador Program, which provides meaningful work experience for residents. SAHA has found that this program is an effective strategy to engage all residents in educational, training, workforce development, and other self-sufficiency programs.
 - ConnectHomeSA: The Agency uses MTW funds to support ConnectHomeSA. This program provides computer training courses. When residents complete six courses they earn a digital device.
 - Choice Endowment: MTW funds were used in conjunction with grants to continue supportive services to residents as part of the Choice Neighborhood Initiative.
2. MTW030, MTW037, MTW040 - East Meadows Development: MTW funds were used to support the Master Development Agreement for the redevelopment of Wheatley Courts and the surrounding Eastside neighborhood. The Agency used these funds for the design and implementation of public improvements.
3. MTW032 - Development of Alazan Lofts: In 2017, SAHA purchased 18 land parcels

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

adjacent to the Alazan Courts using MTW dollars, with the purpose of redeveloping Alazan Courts and the surrounding neighborhood. This activity used MTW funds to pay for the demolition and abatement of an existing structure on one of the 18 purchased lots.

4. MTW042 - 100 Labor Multi Family Development: MTW funds were used towards the closing of the 100 Labor Multifamily Redevelopment Project.
5. MTW043 - Rosemont at Highland Park: MTW funds were used to cover operating expenses of the Rosemont at Highland Park project.
6. MTW045 - Expansion of PH WiFi: As part of the SAHA Road to Digital Inclusion initiative, these MTW funds will be used to narrow the digital divide and bring much needed Internet connectivity and accessibility to the Public Housing and Beacon portfolios. This includes funding the first year of bandwidth, WIFI management, installation, labor and support of the expanded network.
7. MTW046 - Costa Valencia: MTW funds were used to cover the acquisition and related closing costs associated with the purchase of the investor limited partnership and special limited partnership interest in the Costa Valencia property.

PROPOSED ACTION:

None.

FINANCIAL IMPACT:

None at this time.

STRATEGIC OUTCOME:

Supports all strategic outcomes.

ATTACHMENTS:

2021 MTW Report

MTW Report Update Presentation



SAHA
SAN ANTONIO
HOUSING AUTHORITY
Opportunity Lives Here



MOVING TO WORK REPORT

Fiscal Year 2020-2021

Page 117 of 273

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

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

MESSAGE FROM PRESIDENT AND CEO

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

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

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

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

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

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

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

DocuSigned by:

D7D46F73613F4FA...

9/29/2021

Ed Hinojosa, Jr.

President and CEO

San Antonio Housing Authority

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

SAHA Board of Commissioners

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

SAHA Executive Staff

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

SAHA Senior Staff

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

MTW Contacts

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

Table of Contents

I. INTRODUCTION	5
II. GENERAL HOUSING AUTHORITY OPERATING INFORMATION	9
A. HOUSING STOCK INFORMATION	9
B. LEASING INFORMATION	12
C. WAITING LIST INFORMATION	14
D. INFORMATION ON STATUTORY OBJECTIVES AND REQUIREMENTS	15
III. PROPOSED MTW ACTIVITIES	19
IV. APPROVED MTW ACTIVITIES	20
A. IMPLEMENTED ACTIVITIES	20
FY2011-1e – Preservation and expansion of affordable housing	22
FY2011-9 – Allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who will provide supportive services to those households	24
FY2013-2 – Simplified Earned Income Disregard (S-EID)	26
FY2013-4 – HQS Inspection of SAHA-owned non-profits by SAHA inspectors	32
FY2014-3 – Faster Implementation of Payment Standard Decreases (HCV)	34
FY2014-6 – HCV Rent Reform	35
FY2015-1 – MDRC / HUD Rent Reform Study	41
FY2015-2 – Elderly Admissions Preference at Select Public Housing Sites	49
FY2015-3 – Modified Project Based Vouchers	52
FY 2019-1 – Local Small Area Fair Market Rent (SAFMR) Implementation	55
FY2019-2 – Alternate Recertification Process (PH and HCV)	62
FY2020-1 – Palo Alto College, College Homeless Assistance Program	66
FY2020-3 – Family Self Sufficiency (FSS) Program Streamlining	74
FY2021-1 – Next Step Housing Program (THRU Project)	76
FY2021-2 – Limiting increases in rents	79
B. ACTIVITIES ON HOLD	82
FY2020-4 – Time-Limited Workforce Housing Pilot Program (PBV)	82
C. CLOSED OUT ACTIVITIES	86
FY2014-2 – Early Engagement (previously referred to as Path to Self-Sufficiency)	86
FY2017-1 – Time Limited Working Referral Program / Thrive in Five	88
FY2017-2 – Restorative Housing Pilot Program	90
FY2020-2 – St. Phillips College Homeless Program (SPC-HP)	91
V. SOURCES AND USES OF FUNDS	94
A. SOURCES AND USES OF MTW FUNDS	94
B. LOCAL ASSET MANAGEMENT PLAN	96
VI. ADMINISTRATIVE	98
Certification of MTW Statutory Compliance	99

Overview

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

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

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

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

Short-term Accomplishments

Progress towards long-term goals and objectives

Update on SAHA's long-term planning

Alignment of MTW Plan and Strategic Plan

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

SAHA STRATEGIC PLAN

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

GUIDING PRINCIPLES AND STATEMENTS

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



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

LONG-TERM OUTCOMES

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

Two Staff-focused outcomes

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

Four Resident-focused outcomes

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

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

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

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

Featured Success Stories

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



ANGELA

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

SARAH

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

MELONY

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



II. General Housing Authority Operating Information

A. Housing Stock Information

i. Actual New Project Based Vouchers

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

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

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

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

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

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

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

ii. Actual Existing Project Based Vouchers

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

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



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

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

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

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

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

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

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

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

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



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

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

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

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



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

B. Leasing Information

i. Actual Number of Households Served

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

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



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

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

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

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

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

Please describe differences between the Planned and Actual Households Served:

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

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

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

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

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

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

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

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



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

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

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

C. Waiting List Information

i. Actual Waiting List Information

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

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



Please describe any duplication of applicants across waiting lists:

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

ii. Actual Changes to Waiting List in the Plan Year

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

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

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

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

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

Total Local, Non-Traditional Households Admitted	108
---------------------------------------------------------	------------



ii. Maintain Comparable Mix

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

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

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

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

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

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

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

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

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



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

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

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

San Antonio city, Texas					
		2014-2018 Estimates	2009-2013 Estimates	Statistical Significance	Percent Change
Population	Under 18 years	25.30%	26.40%	Yes	-4%
	62 years and over	11.80%	10.80%	Yes	9%
Source: American Community Survey Comparative Demographic Estimates (CP05); 2018 and 2013 Five-Year Estimates					

San Antonio city, Texas					
		2014-2018 Estimates	2009-2013 Estimates	Statistical Significance	Percent Change
Households by Type	Households with one or more people under 18 years	34.3%	37%	Yes	-7%
Percentage of families and people whose income in the past 12 months is below the poverty level	With related children of the householder under 18 years	21.5%	23%	Yes	-7%
Source: American Community Survey Comparative Social Estimates (CP02) and Comparative Economic Estimates (CP03); 2018 and 2013 Five-Year Estimates					

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

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



3 bedrooms	38.9	39.5	-2%
4 bedrooms	15.2	15.1	1%
5 or more bedrooms	2.4	2.3	4%

Source: American Community Survey Comparative Housing Estimates (CP04); 2018 and 2013 Five-Year Estimates

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

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

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



III. Proposed MTW Activities

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

Not Applicable.



V. Approved MTW Activities

A. Implemented Activities

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

i. Plan Year Approved, Implemented, Amended

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

ii. Description/Impact/Update/Rent Reform Hardships

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

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

iii. Actual Non-Significant Changes

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

iv. Actual Changes to Metrics/Data Collection

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

v. Actual Significant Changes

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

vi. Challenges in Achieving Benchmarks and Possible Strategies

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



Summary

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

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



FY2011-1e – Preservation and expansion of affordable housing

MTW Statutory Objective(s): Increase Housing Choices

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

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

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

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

Plan Year Update

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

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



HUD Standard metrics

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

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

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

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

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



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

MTW Statutory Objective(s): Increase Housing Choices

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

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

Plan Year Update

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

HUD Standard Metrics

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

SAHA Metrics

Maintain Households Served



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

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

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

v. Actual Significant Changes: None.

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



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

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

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

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

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

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

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

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

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

Plan Year Update

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



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

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

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

HUD Standard Metrics

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



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



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



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



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

SAHA Metrics

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

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

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

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

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



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

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

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

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

Plan Year Update

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

HUD Standard Metrics

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



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

iii. Actual Non-Significant Changes: None.

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

Per Inspection Costs

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

v. Actual Significant Changes: None.

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



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

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

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

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

Plan Year Update

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

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

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

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



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

Previously approved

FY2014-6: Rent Simplification (HCV)

FY2015-4: Simplified Utility Allowance Schedule

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

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

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

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

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

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



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

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

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

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

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

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

Plan Year Update

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

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

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



Unit of Measurement				
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark
	1 hour * # Households on Rent Simplification	.25 hours * # Households on Rent Simplification	.25 hours * # Households on Rent Simplification	Benchmark met
	4,543	1,136	1,136	
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	11%	5%	N/A	N/A
CE #5: Increase in Agency Rental Revenue (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase). (Defined as Average Tenant Rent to Owner)	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$254.24	\$254.24	\$269.36	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #1: Increase in Household Income(HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to	Expected average earned income of households affected by this policy prior to	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.



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



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



(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.	(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.	(Number of households paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).	(Number of households paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).	exceeds the benchmark.
	0	0	43	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

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

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

v. **Actual Significant Changes:** None

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



FY2015-1 – MDRC / HUD Rent Reform Study

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

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

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

The goals of this alternative rent policy are to:

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

The Study Selection and Target Population Include:

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



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

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

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

Plan Year Update

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

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

HUD Standard Metrics

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



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



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



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



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

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

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

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

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



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



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

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies:

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



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

MTW Statutory Objective(s): Increase Housing Choices

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

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

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

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

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

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

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

Plan Year Update

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



HUD Standard Metrics

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

SAHA Metrics

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



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

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

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



FY2015-3 – Modified Project Based Vouchers

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

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

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

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

Plan Year Update

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

HUD Standard Metrics

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



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

SAHA Metrics



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

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

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



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

MTW Statutory Objective(s): Increase Housing Choices

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

ii. Description/Impact/Update/Rent Reform Hardships

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

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

(1) Maintain Number of Households Served

- No decrease in capacity to serve the same number of households

(2) Minimize Negative Impact

- Minimize negative impact for existing households in low-cost neighborhoods
- No disparate impact on protected classes, including locally recognized classes (sexual orientation, gender identity, veteran status, and age)

(3) Make the SAFMR as easy to use as possible

- Households and landlords have limited time and resources; program design should facilitate program implementation

(4) Leverage the Value of the Voucher

- Maximize value of vouchers in targeted growth areas and rapidly changing neighborhoods

Overview of Phases

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



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

Plan Year Update

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

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

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

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

HUD Standard Metrics

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



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

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

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

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

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



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

SAHA Metrics

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

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



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

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

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

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



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

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

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection

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

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies:

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



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

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

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



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

MTW Statutory Objective(s): Increase Housing Choices

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

ii. Description/Impact/Update/Rent Reform Hardships

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

(1) Alternate Recertification Schedule (PH and HCV)

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

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

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

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

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



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

(2) Alternate PH Review Procedures (PH only)

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

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

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

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

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

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

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

Plan Year Update

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

HUD Standard Metrics	
CE #1: Agency Cost Savings	



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

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

CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	HCV: 16% PH: 45%	HCV: 16% PH: 40%	HCV: n/a due to Covid-19 PH: n/a due to Covid-19	Benchmark not met.

CE #5: Increase in Agency Rental Revenue



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

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None

vi. Challenges in Achieving Benchmarks and Possible Strategies: None



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

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended

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

ii. Description/Impact/Update/Rent Reform Hardships

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

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

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

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



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

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

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

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



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

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

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

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

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

Plan Year Update

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



HUD Standard Metrics

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

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



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

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

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



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

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

SS #8: Households Transitioned to Self Sufficiency



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

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

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

v. **Actual Significant Changes:** None



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



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

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

i. Plan Year Approved, Implemented, Amended

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

ii. Description/Impact/Update/Rent Reform Hardships

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

Plan Year Update

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

HUD Standard Metrics

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

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



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

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection:None

v. Actual Significant Changes: None

vi. Challenges in Achieving Benchmarks and Possible Strategies: None



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

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended

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

ii. Description/Impact/Update/Rent Reform Hardships

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

Partner Program Overview

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

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

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

Activity Overview

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

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

Year 1 (12 months)

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

¹ Youth may currently be in extended foster care.



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

Years 2 and 3 (24 months)

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

Alignment with other MTW activities

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

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

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

Plan Year Update

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

HUD Standard Metrics



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

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

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

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

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

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

v. **Actual Significant Changes:** None

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



FY2021-2: Limiting increases in rents

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended

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

ii. Description/Impact/Update/Rent Reform Hardships

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

Background

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

Plan Year Update

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

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

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

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

B. ACTIVITY METRICS INFORMATION

HUD Standard Metrics



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

SAHA Metrics

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

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

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

v. **Actual Significant Changes:** None

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

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



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

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



A. Activities on Hold

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

MTW Statutory Objective(s): Promote Self-Sufficiency

i. Plan Year Approved, Implemented, Amended

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

ii. Description/Impact/Update/Rent Reform Hardships

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

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

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

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

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

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

Program Qualifications:

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

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



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

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

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

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

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

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

Plan Year Update

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

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



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

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

SS#3: Increase in Positive Outcomes in Employment Status		
Unit of Measurement	Baseline	Benchmarks
Average amount of savings/escrow of households affected by this policy in dollars (increase).	Average savings/escrow amount of households affected by this policy prior to implementation of the activity (in dollars). This number may be zero.	Expected average savings/escrow amount of households affected by this policy after implementation of the activity (in dollars).
Report the following information separately for each category: 1. Employed Full- Time 2. Employed Part- Time 3. Enrolled in an Educational Program 4. Enrolled in Job Training Program 5. Unemployed 6. Other	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of work-able households in <<category name>> after implementation of the activity (number).
	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).
1. Employed Full- Time 2. Employed Part- Time 3. Enrolled in an Educational Program 4. Enrolled in Job Training Program 5. Unemployed 6. Other	TBD at enrollment	TBD at enrollment

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

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

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



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

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

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

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

iii. Actual Non-Significant Changes: None

iv. Actual Changes to Metrics/Data Collection: None

v. Actual Significant Changes: None

vi. Challenges in Achieving Benchmarks and Possible Strategies: None



B. Closed Out Activities

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

MTW Statutory Objective(s): Increase Housing Choices

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

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

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

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

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

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



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

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

Results to date:

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

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

² Metric added in FY2018 Report



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

FY2017-1 – Thrive in Five

(formerly referred to as Time Limited Working Referral Program)

MTW Statutory Objective(s): Promote Self-Sufficiency

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

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

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

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



competing program requirements that were connected to specific program funding.

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

Results to date:

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

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

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

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



FY2017-2 – Restorative Housing Pilot Program

MTW Statutory Objective(s): Promote self-sufficiency

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

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

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

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



FY2020-2: St. Phillips College Homeless Program (SPC-HP)**MTW Statutory Objective(s):** Increase Housing Choices**i. Plan Year Approved, Implemented, Amended**

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

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

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

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

Closed out in Prior Years**FY2011-1- Block grant funding with Full Flexibility**

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

FY2011-1a- Promote Education through Partnerships

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

FY2011-1b- Pilot Child Care Program

Closed out in FY2013 Report.

FY2011-1c- Holistic Case Management

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

FY2011-1d- Resident Ambassador Program

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



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

Closed out in FY2013 Report.

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

Closed out in FY2013 and replaced with FY2014-4.

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

Closed out in FY2013 and replaced with FY2014-1.

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

Closed out in FY2013 and replaced with FY2014-1.

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

Closed out in FY2013 and replaced with FY2014-4.

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

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

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

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

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

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

FY2011-8 – Revise Mobility Rules

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

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



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

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

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

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

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

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

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

FY2014-4 – Biennial Reexaminations (HCV and PH)

FY2014-5 – Triennial Reexaminations (HCV)

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

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



V. Sources and Uses of Funds

A. Sources and Uses of MTW Funds

i. Actual Sources of MTW Funds in the Plan Year

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

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

Sources of MTW Funds include the following:

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

ii. Actual Uses of MTW Funds in the Plan Year

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

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

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

iii. Describe Actual Use of MTW Single Fund Flexibility

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



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

ACTUAL USE OF MTW SINGLE FUND FLEXIBILITY

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

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

Detailed below is more information on specific uses and programs.

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



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

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

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

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

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

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

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

B. Local Asset Management Plan

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

NA
NA
NA



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

Not Applicable



VI. Administrative

A. Reviews, Audits and Inspections

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

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

B. Evaluation Results

Results of latest PHA-directed evaluations of the demonstration.

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

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

C. MTW Statutory Requirement Certification

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

See the following page.

D. MTW Energy Performance Contract (EPC) Flexibility Data

Not Applicable



Certification of MTW Statutory Compliance

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

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

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

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

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

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

Mix of Family Sizes Served

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

DocuSigned by:

E Hinojosa Jr
 D7D46F73613F4FA...
 Ed Hinojosa
 President and CEO

9/29/2021

Date





MTW REPORT FY 2020-2021

Operations and Real Estate Committee
November 18, 2021

The purpose of this presentation is to provide a summary to the operations committee and the public of the FY 2021 MTW Report submitted to HUD on September 30, 2021, per reporting requirements in HUD Form 50900.

MTW OVERVIEW

3

The Moving to Work Designation allows the agency to work differently than other PHAs by allowing the agency to waive some regulatory waivers and combine funding for approved non-traditional uses.

1

REGULATORY WAIVERS

2

FUNDING FUNGIBILITY

MTW SOURCES OF FUNDS

Dept of Housing and
Urban Development

PH Operating
Subsidy

HCV Block Grant
funding

PH CFP (including
DDTF) Grants

PH Rental & Other
Income (rents +
other charges)

**Fungibility
via Budget
Process**

MTW USES OF FUNDS

PH Operating
Expenses

HCV Operating
Expenses

PH Capital
Improvements

MTW Flexible Uses

MTW STATUTORY OBJECTIVES

4

All regulatory waivers and non-traditional uses of funds are leverage to further at least one of the statutory objectives.



Cost Efficiency/ Effectiveness

Reduce cost and achieve greater cost effectiveness in Federal expenditures.



Housing Choice

Increase housing choices for low income families.



Self-Sufficiency

Give incentives to families with children where the head of household is working, seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient.

FY 2020 Final HUD Compliance Determination

5

Per PIH 2013-02, Baseline Methodology for MTW PHAs, HUD reviews SAHA's compliance with serving substantially the same number of households.

% TOTAL	101%
Compliance Determination	Compliant

Families served through MTW Public Housing	5,585
Families served through MTW Vouchers	12,393
Other Families Served Through MTW	183
NUMERATOR - Families Served Total	18,161

Baseline Number of Families (Public Housing)	5,721
Incremental Increase to Baseline	+43 ¹
Incremental decrease to Baseline	-28 ²
Baseline Number of Families (Vouchers)	12,146
Incremental Increase to Baseline	+94 ³
Incremental decrease to Baseline	-0
DENOMINATOR - Baseline Total	17,976

Table Notes:

¹ (42 units at East Meadows II, 1 unit added at Wheatley Park Sr.)

² (Disposition of various scattered sites)

³ (Housing Conv (94 units at Scattered Sites))

FY 2021 MTW STATUTORY REQUIREMENTS

6

In leveraging MTW flexibilities, the Agency must meet specific statutory requirements to maintain compliance. SAHA continues to maintain compliance.

VERY LOW INCOME

Ensure that at least 75 percent of the families assisted are very low-income families

SUBSTANTIALLY THE SAME (STS)

Assist substantially the same total number of eligible low-income families under MTW, as would have been served absent the demonstration

COMPARABLE MIX

Maintain a comparable mix of families by family size, as would have been served or assisted had the amounts not been used under the demonstration

98%

served in FY2021 were below 50% AMI

100%

17,971 households served out of an adjusted baseline of 17,950

3%

Family Size deviated between -2% and 3% of the baseline across sizes

FY 2021 MTW ACTIVITY TRACKING

7

MTW Activity

MTW efforts that require a regulatory waiver and standard metrics

Example: Conducting annual recertification of household income every 2-3 years

MTW Initiative

MTW efforts that use MTW single fund flexibility only and do not require standard metrics and are tracked through funding sources and uses reporting

Example: Self-sufficiency program administration

FY 2021 Activities Status

● **11** On Track

Activities meeting benchmarks

○ **5** Behind Plan

Activities not meeting benchmarks
Behind on implementation

● **4** Closed Out

Activities closed out and waivers removed

FY 2021 COST EFFICIENCY/EFFECTIVENESS

8

MTW Activity

- 13-4- HQS Inspection of SAHA-owned non-profits by SAHA inspectors (HCV)
- 14-3- Faster Implementation of Payment Standard Decreases (HCV)*
- 14-6- Rent Simplification / 15-4- Simplified Utility Allowance Schedule (HCV)
- 15-1- MDRC / HUD Rent Study (HCV)**
- 19-2- Alternative Recertification Process (HCV & PH)
- 20-3- Family Self-Sufficiency Program Streamlining

*Did not use waiver this year

**Preparing to close out in FY2023 at the end of the contract

● On Track

6

○ Behind Plan

0

● Closing Out

0



Combined estimated efficiencies are valued at \$4.5M since 2013

FY 2019-2: Alternate Recertification Process

9

SAHA is using MTW flexibilities to make changes to existing processes that result in efficiencies for the Agency and alleviate burden to the families. Since 2019, the Agency estimates savings at nearly \$2M as a result of 19-2.

Alternate schedule (established at SAHA/ HCV 2011)

Triennial (every 3 years): targeting older adults and those with disabilities on 100% fixed income

Biennial (every 2 years): all other households

Alternate review procedures (PH only)

Applies alternate schedule to flat rent notice and family composition update notifications

Alternate income verification methods

Accept self-certification of the value of family assets and anticipated asset income for net assets totalling \$25,000 or less

Accept oral third-party verification and applicant-provided documents dated within 90 days

Schedule

Prior to HOTMA, recertifications scheduled annually.

Review Procedures

Annual flat rent notices and family composition updates

Income Verification Methods

Accept self-certification at \$5,000 or less

Third-party written form and documents dated within 30 days

COST EFFICIENCY/EFFECTIVENESS

10

FISCAL YEAR

13	14	15	16	17	18	19	20	21
<ul style="list-style-type: none"> 13-4- HQS Inspection of SAHA-owned non-profits by SAHA inspectors (HCV) 	<ul style="list-style-type: none"> 14-3- Faster Implementation of Payment Standard Decreases (HCV)* 14-4- <i>Biennial Reexaminations (HCV & PH)</i> 14-5- <i>Triennial Reexaminations (HCV)</i> 14-6- Rent Simplification 	<ul style="list-style-type: none"> 15-1- MDRC / HUD Rent Study (HCV) 15-4- Simplified Utility Allowance Schedule (HCV) 	<ul style="list-style-type: none"> 16-2- <i>Biennial and Triennial Notification of Rent Type Option</i> 			<ul style="list-style-type: none"> 19-2- Alternative Recertification Process (HCV & PH) [<i>Consolidates 14-4, 14-5, and 16-2</i>] 	<ul style="list-style-type: none"> 20-3- FSS Program Streamlining 	

HOUSING CHOICE

11

MTW Activity

- 11-1e- Preservation and Expansion of Affordable Housing
- 11-9- Allocate tenant-based voucher set-asides
- 14-2- Early Engagement Program (EEP) (HCV and PH)
- 15-2- Elderly Admissions Preference at Select Public Housing Sites (PH)
- 15-3- Modified Project Based Vouchers (HCV)
- 19-1- Local Small Area Fair Market Rent (SAFMR) Implementation (HCV)
- 20-1- Palo Alto College, College Homeless Assistance Program (HCV)
- 20-2- St. Phillips College Homeless Program (HCV) - consolidated with 20-1 Palo Alto Program
- 21-1- Next Step Housing Program (THRU Project)
- 21-2- Limiting increase in rents (HCV)



874 new units since 2014

56% moved to targeted SAFMR groups 4-10

115 households prevented from being displaced

● **On Track**

5

○ **Behind Plan**

3

● **Closing Out**

2

2020-1. College and University Homeless Assistance Program

12

SAHA is using MTW flexibilities to implement new housing programs designed in collaboration with partners for specific populations. Currently, the Agency has allocated up to 50 tenant-based vouchers for homeless college students.

Set-aside program with expedited housing

Establishes a set-aside voucher program with waitlist local preferences to expedite housing

Additional eligibility requirements by partner

Ties the housing assistance to college program requirements.

Portability Limitation

Voucher assistance is tied to SAHA's jurisdiction to ensure students are receiving housing and supportive services through the partner during their academic journey.

Three year limit

Voucher assistance is designed to be temporary and last the duration of the students academic journey with the partner.

Voucher Program Waitlist

Students would wait on main waitlist.

Partner Eligibility Requirements

Not applicable.

Portability

Student could move outside SAHA jurisdiction with voucher and not have access to services.

Assistance Limitation

Assistance tied to household income

HOUSING CHOICE

13

FISCAL YEAR

13

14

15

16

17

18

19

20

21

- 11-1e- Preservation and Expansion of Affordable Housing
- 11-9- Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services (HCV)

- 14-2- Early Engagement Program (EEP) (HCV and PH)

- 15-2- Elderly Admissions Preference at Select Public Housing Sites (PH)
- 15-3- Modified Project Based Vouchers (HCV)

- 19-1- Local Small Area Fair Market Rent (SAFMR) Implementation (HCV)

- 20-1- Palo Alto College, College Homeless Assistance Program (HCV)
- 20-2- St. Phillips College Homeless Program (HCV)

- 21-1- Next Step Housing Program
- 21-2- Limiting rent increases (HCV)

SELF-SUFFICIENCY

14

MTW Activity

- ☐ 13-2- Simplified Earned Income Disregard (S-EID) (PH)
- ☒ 17-1- Thrive in Five Program (PH)
- ☒ 17-2- Restorative Housing Pilot Program (PH)
- ☐ 20-4- Time-Limited Workforce Housing Pilot Program (PBV) - on hold

● On Track

0

○ Behind Plan

2

● Closing Out

2

SELF-SUFFICIENCY

15

FISCAL YEAR

13

14

15

16

17

18

19

20

21

- 13-1 Time-limited Working Preference
- 13-2- Simplified Earned Income Disregard (S-EID) (PH)

- 17-1- Thrive in Five Program (PH) [Replaced 13-2]
- 17-2- Restorative Housing Pilot Program (PH)

- 20-4- Time-Limited Workforce Housing Pilot Program (PBV) [On Hold]

FY 2013-2- Simplified Earned Income Disregard (PH)

16

SAHA is using MTW flexibilities to implement alternative rent policies that benefit residents on their path to self-sufficiency. SEID leverages external grant funds to provide services coupled with the disregard.

Simplified EID

For five years, any Increases in income are disregarded (not included) in the rent calculation:

Year 1: 100% of increase in income is not included

Year 2: 80% ...

Year 3: 60% ...

Year 4: 40% ...

Year 5: 20% ...

Supportive Service requirement

Rent relief tied to an approved self-sufficiency program to support recruitment and enrollment and incentivize work;
Financial Literacy class requirement

Target Population

Public Housing only

HUD EID / Rent Calculation

Rent increases when a household's income increases.

In 2013, the 5 years was cumulative and the period could be stopped and started.

Supportive Services

Not tied to nor funding provided for supportive services.

Population

HCV and PH households per Admin and ACOP plans.

CURRENT INTERNAL EVALUATIONS

17

Process and Implementation Evaluations

- 20-1 College and University Homeless Assistance Program (HCV) (Palo Alto and St. Philips)
- 21-1 Next Step Housing Program (THRU Project)

USES OF MTW FUNDS

18

Uses identified in this schedule are outside of the operating cost of the Section 8, Public Housing, and CFP programs, which comprise our MTW block grant.

Projects

Uses as of 6/30/2021

Community Development Initiatives	\$ 1,438,829.00
Public Housing Operating Loss	\$ 973,614.00
Capital Planning	\$ 359,742.00
Expansion of Public Housing WiFi	\$ 451,993.00
Development Activities:	
East Meadows Development	\$ 668,629.00
Legacy at Alazan	(\$ 52,510.00)
100 Labor Multi-Family Development	\$ 3,786,280.00
Rosemont at Highland Park	\$ 1,000,000.00
Costa Valencia	\$ 328,284.00
Total	\$ 8,954,861.00

USES OF MTW FUNDS

19

Projects

Uses as of 6/30/2021

Community Development Initiatives

\$ 1,438,829.00

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

USES OF MTW FUNDS

20

Projects

Uses as of 6/30/2021

Expansion of Public Housing WiFi	\$ 451,993.00
----------------------------------	---------------

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

PLANNING

SAHA 2025

The Strategic Plan is the overarching plan document that provides a comprehensive guide to the Agency's strategic policy priorities over a five year period -- serving as a guide to all other Agency plan and policy documents.

BUDGET PLAN

The Annual Budget Plan reflects the agency's Strategic 2025 priorities by allocating its resources to support annual implementation plans.

MTW PLAN

The Annual MTW Plan describes the Agency's planned use of its Moving to Work flexibilities, including MTW waiver requests and other required MTW information that will support the Agency's annual implementation plan. The MTW Plan replaces the required "PHA Plan" and includes the Agency's implementation documents (ACOP, Admin Plan, and CFP).

21

STRATEGIC PLAN

5-YR Priorities

BUDGET PLAN

1-YR Use of Funding to Achieve Priorities

IMPLEMENTATION

1-YR Actions to Achieve Priorities

MTW PLAN

ACOP

ADMIN

ASSET
PLAN

CFP
PLAN

QUESTIONS?

SAN ANTONIO HOUSING AUTHORITY

November 18, 2021

MEMORANDUM

To: Operations and Real Estate Committee

From: Ed Hinojosa, Jr., President and CEO

Presented by: George M. Ayala, Director of Procurement

RE: Procurement Activity Report

DS
EHJ

SUMMARY:

Through the third calendar quarter ending September 30, 2021, the San Antonio Housing Authority's Procurement Department issued 27 formal and 18 informal solicitations, receiving a total of 174 responses. This resulted in an average of responses per formal solicitation of 4 and 3.67 responses per informal solicitations, for an overall average response rate of 3.87 per solicitation. New contracts awarded through the third calendar quarter ending September 30, 2021, were \$16,992,638.52; contract renewals in the amount of \$10,559,240.02, and \$2,865,000.00 in blanket awards, which resulted in a grand total awarded of \$30,416,878.55. Of this total, \$14,097,004.84 or 46.35 percent, was awarded to Small, Women-Owned, and Minority Business Enterprises (SWMBE), and \$10,677,723.08 or 35.11 percent, was awarded to Section 3 business concerns.

Through the calendar quarter ending on September 30, 2021, SAHA contractors reported:

Current Section 3 workers - 35,
 Current targeted Section 3 workers - 0,
 Non-Section 3 workers - 19,
 Non-targeted Section 3 workers - 0,
 New Section 3 workers - 8, and
 New targeted Section 3 workers - 2

Of the total number of workers, which is: 54; 8 of the new hires qualified as Section 3 individuals, and 2 of the new hires qualified as Targeted Section 3 individuals, which represented 18.5% percent of all new hires.

The labor hours breakdown by category is as follows:

<u>3,177.9</u>	Total Current Section 3 Workers labor hours
<u>0</u>	Total Current Targeted Section 3 Workers labor hours
<u>297.75</u>	Total New Section 3 Workers labor hours
<u>146</u>	Total New Targeted Section 3 Workers labor hours

Note: Through the calendar quarter ending September 30, 2021, SAHA has hired 4 Section 3 employees into full-time positions within the agency.

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021****CURRENT SOLICITATIONS:**

There are currently two Invitation For Bids, one Quick Quote, and one Request for Proposals currently being advertised. The Invitation for Bids are for Purchase of Stone, Sand, and Gravel and Carpet and Flooring Purchase Replacement and Installation; the Quick Quote is for Foundation Repair at William Sinkin, Unit 131; and the Request For Proposals is for Case Management Temporary Staffing Services for the Assisted Housing Programs.

CLOSED/PENDING SOLICITATIONS:

There are five solicitations that have closed and are currently being evaluated. The solicitations are for Purchase of 3 Golf Carts, Moving and Temporary Storage, Resident Council Redevelopment Consulting Services, Disparity and Availability Study, and Natural Gas System Inspection, Patrols, and Reporting.

SOLICITATIONS IN DEVELOPMENT:

Procurement is currently working on a number of solicitations for advertisement. These include: Developer Pool, painting of the structural steel columns on the North Tower; security cameras locking system at Lincoln Heights; foundation stabilization at 4957 Champlain; purchase and installation of metal canopy at Fair Avenue; painting of the entry and laundry room doors at Villa Tranchese; debt collection services (agency wide); foundation repairs, plumbing, and structural improvements (agency wide); and vending concessions for SAHA properties.

BLANKET AWARDS:

Contract Title	Number of Awards	Amount of Blanket Award	Projects Awarded 3rd Quarter 2021
Architectural and Engineering Services	8	\$1,500,000.00	\$9,139.68
Architectural and Engineering and Other Forensic Consulting Services	4	\$1,500,000.00	\$0.00
Backflow Inspection, Maintenance, Repair, and Installation	2	\$70,000.00	\$2,018.50
Bulk Pick Up Services (Board approved new award 8/5/2021)	2	\$270,000.00	\$128,329.28
Automated and Manual Bulk Pick Up Services)	2	\$500,000.00	\$47,673.88
Carpet and Flooring Purchase, Replacement, and Installation	2	\$325,000.00	\$137,929.91
Consulting and Guidance on HUD and Other Affordable			

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

Housing Programs	2	\$100,000.00	\$179.00
Disaster Restoration of Operation Services	3	\$250,000.00	\$0.00
Electrical Maintenance and Repair	2	\$500,000.00	\$66,673.64
Engineering, Professional	3	\$1,500,000.00	\$79,180.50
General Disaster Recovery and Restoration Services	3	\$250,000.00	\$0.00
HVAC, Residential Style Systems	3	\$1,200,000.00	\$282,133.71
Land Surveyor Services	3	\$75,000.00	\$0.00
Legal Services	9	\$500,000.00	\$4,532.00
Bond/Mixed Finance Counsel	5	1% of Bond of Issue	
Special Counsel Board Matters	1	\$60,000.00	\$24,213.53
Make Ready Services for Public Housing	3	\$2,200,000.00	\$663,073.53
Mowing and Grounds Maintenance for Beacon Communities	4	\$500,000.00	\$96,570.80
Mowing and Grounds Maintenance for Public Housing	4	\$1,000,000.00	\$207,187.45
Painting Services for Beacon Communities	2	\$200,000.00	\$51,929.89
Pest Control for Beacon Communities	2	\$220,000.00	\$24,213.30
Pest Control for Various SAHA Public Housing and Administrative Properties	2	\$500,000.00	\$34,872.87
Plumbing and Related Maintenance Services	2	\$2,200,000.00	\$483,608.87
Public Relations Consulting			

SAN ANTONIO HOUSING AUTHORITY**November 18, 2021**

Services	2	\$150,000.00	\$26,717.10
On Call Real Estate Appraisal Services	2	\$250,000.00	\$0.00
Real Estate Broker Services, Commercial	6	Maximum 6% fee; \$200/consulting and market analysis	\$0.00
Real Estate Broker Services, Residential	2	\$250,000.00	\$0.00
Security Services, Various	3	\$1,060,000.00	\$211,377.12
Shingle roof repair and limited replacement	2	\$250,000.00	\$62,475.93
Temporary and Contract Personnel Services	4	\$3,089,060.00	\$1,340,786.69

PROPOSED ACTION:

None at this time.

FINANCIAL IMPACT:

Amounts paid according to award provisions.

STRATEGIC OUTCOME:

Supports all strategic outcomes.

ATTACHMENT:

Procurement Activity Report

Procurement Activity Report as of November 3, 2021				
Solicitations Currently being Advertised				
SAHA Department	Type	Solicitation Name	Bidders Conference	Closes
Public Housing	QQ	Foundation Repair William Sinkin Unit 131	N/A	11/05/2021
Public Housing	IFB	Purchase of Stone, Sand and Gravel	N/A	11/23/2021
Federal Housing Programs	RFP	Case Management Temporary Staffing Services for the Assisted Housing Programs	N/A	11/30/2021
Agency Wide	IFB	Carpet and Flooring Purchase Replacement and Installation	N/A	12/02/2021
SAHA Department	Type	Solicitation Name	Date Closed	November 18, 2021 Operations Meeting; December 2, 2021 Board Meeting
Public Housing	IFB	Repair and Resurfacing of Cross Creek Apartments parking lot	10/06/2021	
Legal	RFP	Legal Services	09/22/2021	
Board of Commissioners	RFP	Legal Services – Special Counsel for Board Matters	09/22/2021	
Solicitations Under Evaluation				
Beacon Communities	QQ	Purchase of 3 Golf Carts	10/14/2021	Procurement Negotiations Due Diligence Evaluation
Agency Wide	IFB	Moving and Temporary Storage	10/18/2021	
Community Development Initiatives	RFP	Resident Council Redevelopment Consulting Services	10/22/2021	
Executive	RFP	Disparity and Availability Study	10/26/2021	
Construction Services	IFB	Natural Gas System Inspection, Patrols, and Reporting	10/26/2021	
Future Solicitations		Solicitation Name	Anticipated Month of Release	
DSNR		Developer Pool	Department Hold	
General Services		Painting of the structural steel columns on the North Tower	November 2021	
Public Housing		Security Cameras and Locking Systems at Lincoln Heights	November 2021	
Public Housing		Painting of the entry and laundry room doors at Villa Tranchese	November 2021	
Public Housing		Foundation Stabilization 4957 Champlain	January 2022	
Public Housing		Purchase and Installation of Metal Canopy at Fair Avenue	January 2022	
Agency Wide		Debt Collection Services	Department Hold	
		Foundation Repairs, Plumbing, and Structural Improvements	Department Hold	
		Vending Concessions for SAHA Properties	January 2022	

Categories of Procurements

SAHA Department	Solicitation Name	Vendor	Amount	Date
Awards Under President and CEO Expanded Authority				
Community Development Initiatives	Grant Manager	Ernestine Hopkins	\$94,501.97	10/29/2021
Public Housing	Brush and tree clean up at HB Gonzalez	B&T Dependable Services	\$3,625.00	10/08/2021
Public Housing	Demolish and haul away a damaged concrete porch and dismantle an aluminum screen porch at 14015 Green Jay	R&J Muniz	\$7,789.00	10/14/2021
Construction Services	Temporary fencing and three port-a-toilets at Victoria Plaza	National Construction Rentals	\$6,709.68	10/18/2021
Public Housing	Playground repairs at Westway	MDC Painting	\$5,345.00	10/23/2021
General Services	Window Repairs at SAHA's Central Office	Garland through OMNIA Partners	\$24,015.45	10/25/2021
Innovative Technology	Better Cloud License Renewal	SADA Systems	\$18,467.60	10/25/2021
Public Housing	New Roof Building 2 Park Square	Vara Developers Group	\$26,635.64	10/29/2021
IT Purchases (Resolution 6010 authorizing the use of Cooperative Purchasing Contracts and General Administration (GSA Federal Supply Schedules))				
Innovative Technology	Graphus Phishing Defense Solution	SHI Government Solutions	\$24,510.05	10/08/2021



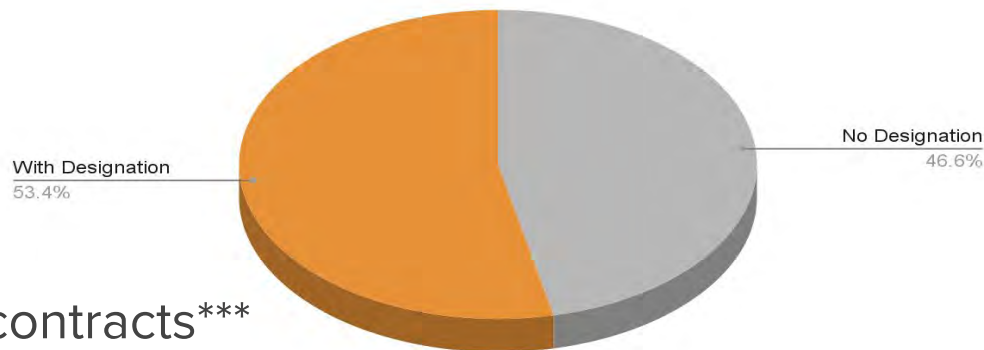
PROCUREMENT REPORT

Business Enterprise Designations
January through September 2021

OVERVIEW

- 45 solicitations*
 - 27 formal
 - 18 informal
- 174 total responses**
 - 58% have a designation
- 54 responses were awarded contracts***
 - 53% have a designation

Award Breakdown

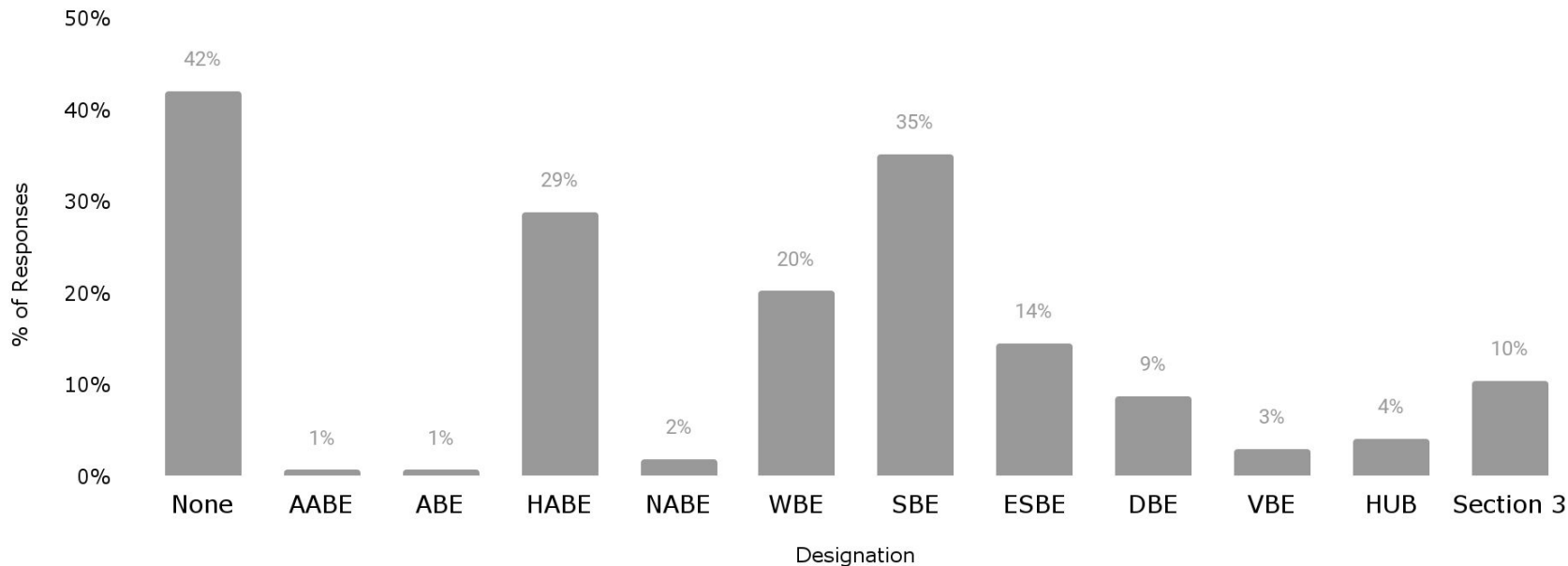


*Solicitations that were also awarded during the reporting period

**Includes vendors who responded to more than one solicitation, each response is counted separately

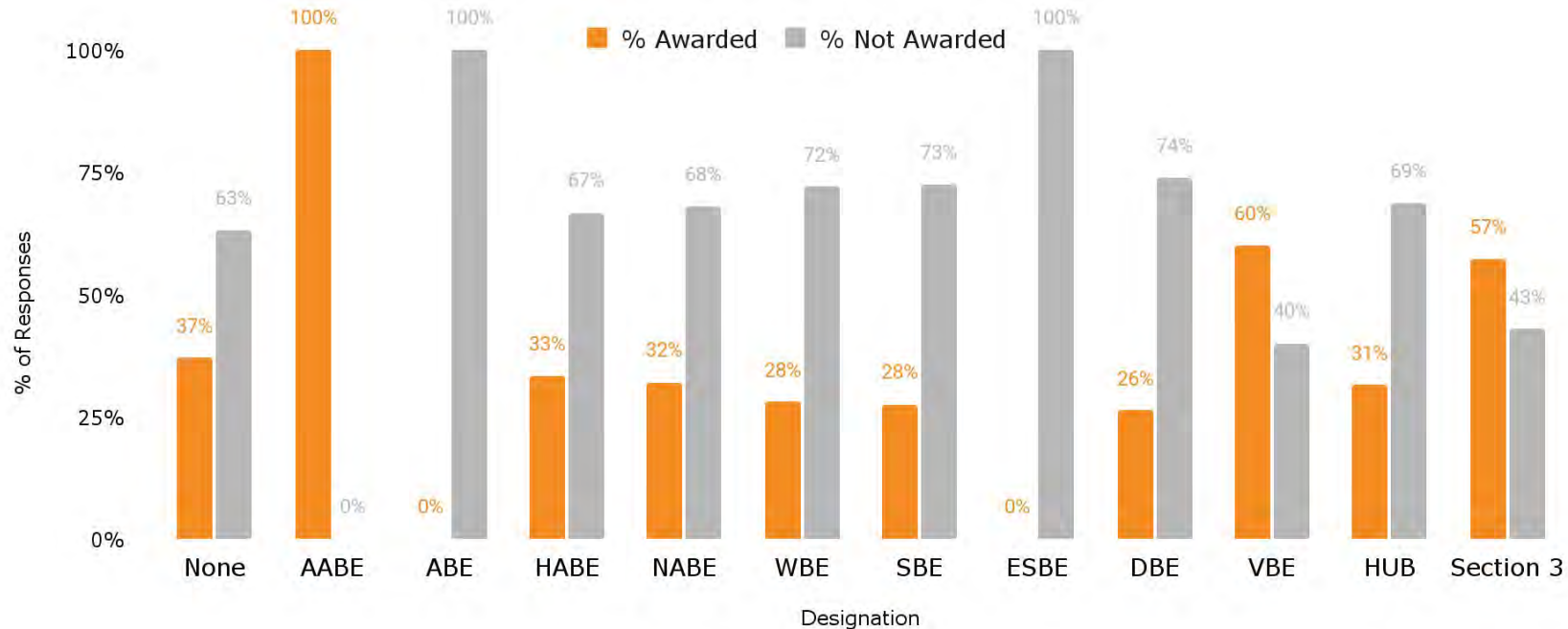
***Includes multiple awards per solicitation, each awarded response is counted separately

RESPONSES BY DESIGNATION



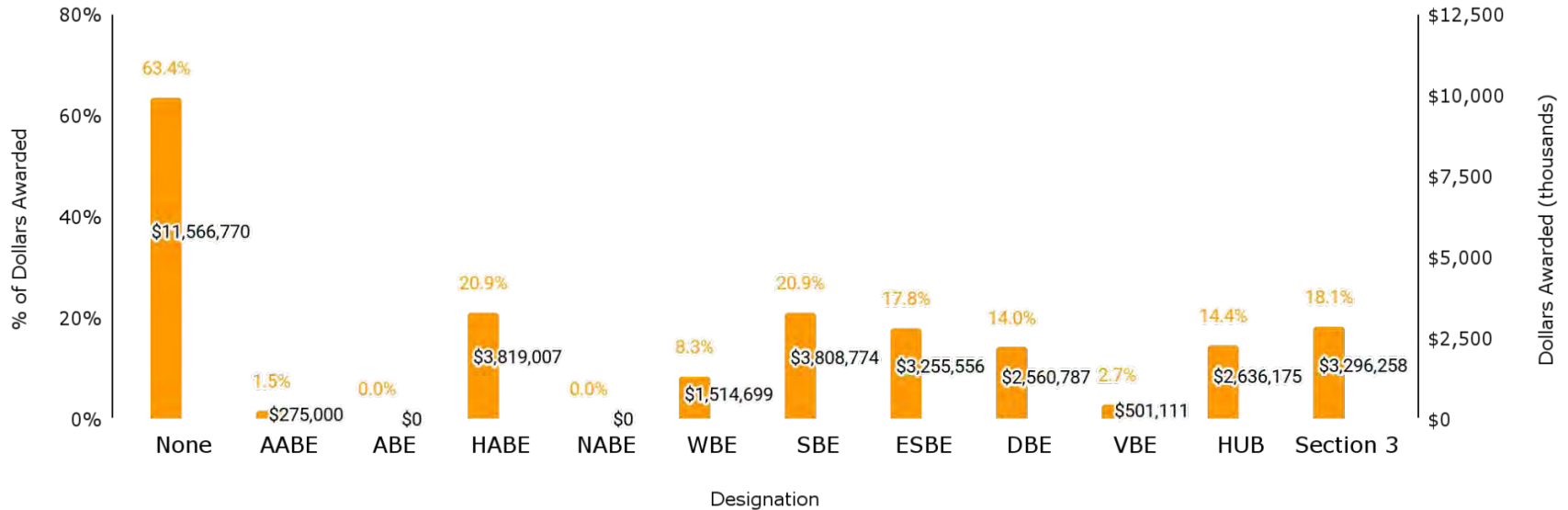
*Percentages do not total to 100% because responders can have multiple designations

RESPONSE OUTCOMES BY DESIGNATION



*Percentages do not total to 100% because responders can have multiple designations

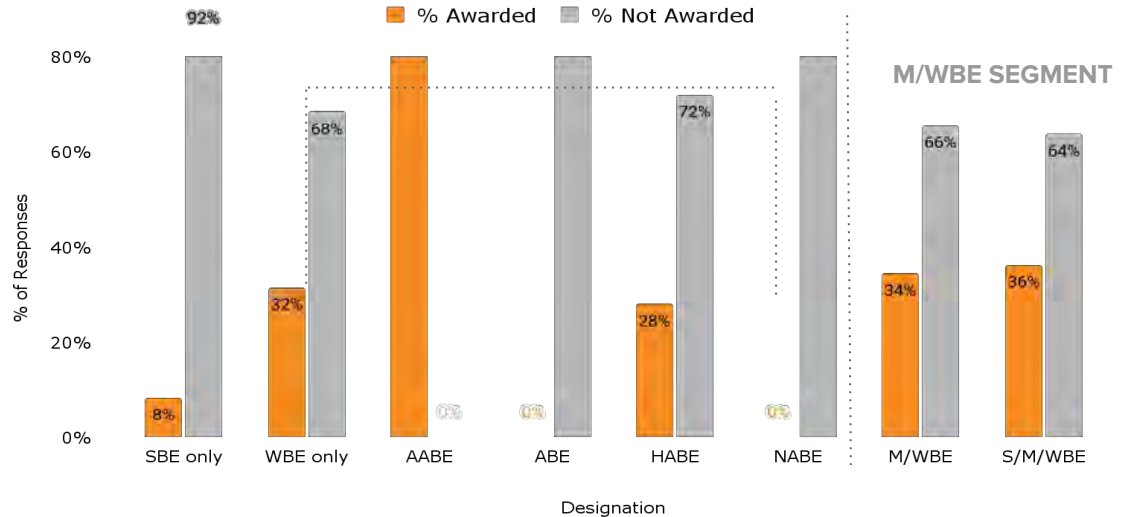
AWARDED AMOUNT BY DESIGNATION



*Percentages do not total to 100% because responders can have multiple designations

RESPONSE OUTCOMES BY S/M/WBE

58% of responses awarded a contract were Small, Minority, and/or Woman Owned Enterprises (S/M/WBE)



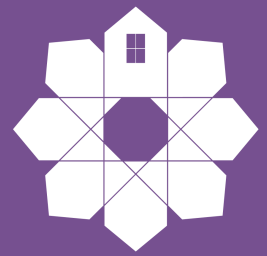
*Percentages do not total to 100% because responders can have multiple designations

DESIGNATIONS

Designation	Acronym
African American Business Enterprise	AABE
Asian American Business Enterprise	ABE
Native American Business Enterprise	NABE
Hispanic American Business Enterprise	HABE
Woman Business Enterprise	WBE
Veteran Business Enterprise	VBE
Small Business Enterprise	SBE
Emerging Small Business Enterprise	ESBE
Disadvantaged Business Enterprise	DBE
Historically Underutilized Business	HUB
Section 3	Section 3

For more information: <https://www.sanantonio.gov/SBO/Media-Resource-Center/Acronyms>

QUESTIONS?



SAHA
SAN ANTONIO
HOUSING AUTHORITY
Opportunity Lives Here



FHP QUARTERLY UPDATE REPORT

Fiscal Year 2021–22

Q1: July–September 2021

FHP WAITLIST REPORT

HOUSING CHOICE VOUCHER WAITLIST

2,325

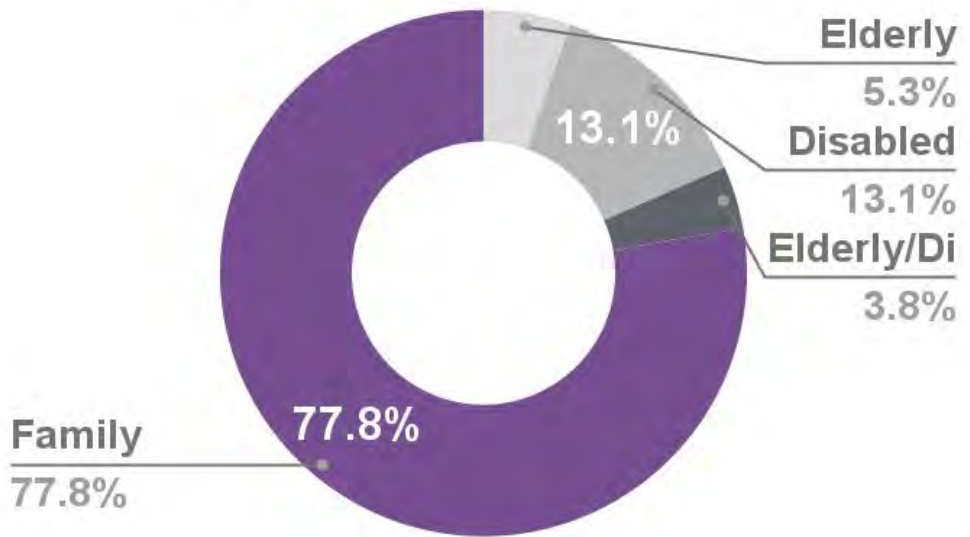
Total of Current Applicants on Waitlist

2,918

Total of Applicants Selected Jul - Sept

2,592

Total Number of Applicants Removed from Waitlist



TOP REASONS FOR REMOVAL

Letter Returned Undeliverable

No Response

Criminal History

LEASE-UP SUCCESS RATE

The lease-up success rate was previously measured from the time a family was pulled from the waitlist to when they leased up, and is now being gauged from the time of the family's voucher issuance to lease-up.

88.6%

FHP WAITLIST REPORT

PUBLIC HOUSING WAITLIST

51,099

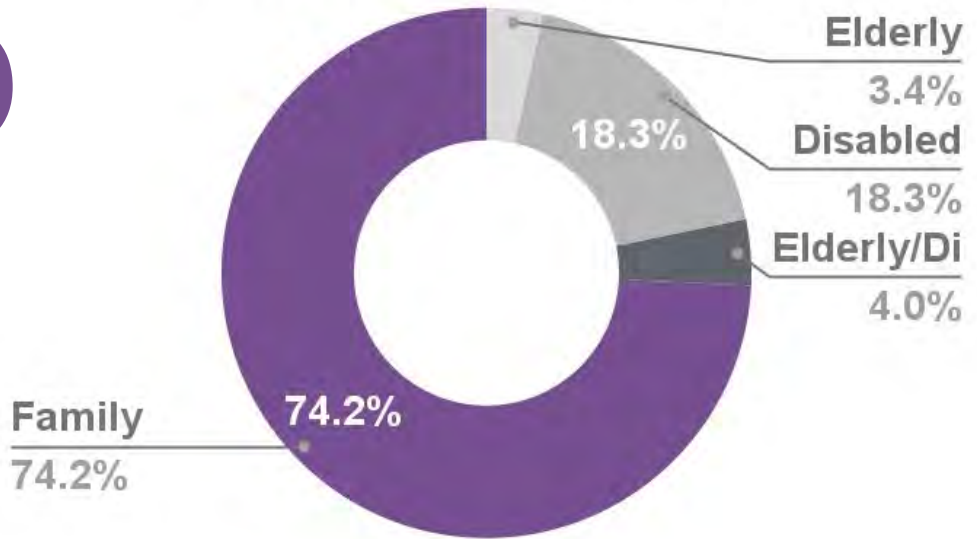
Total of Current Applicants on Waitlist

2,312

Total of Applicants Selected Jul - Sept

1,580

Total Number of Applicants Removed from Waitlist



TOP REASONS FOR REMOVAL

No Response

Letter Returned Undeliverable

Applicant Requested

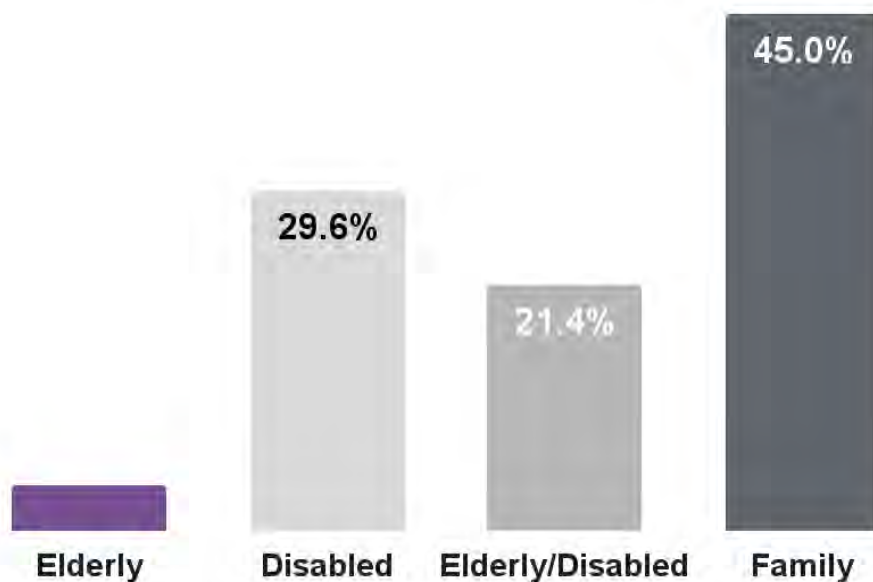
LEASE-UP SUCCESS RATE

The lease-up success rate for Public Housing increased from 3.9% in FY21-Q4.

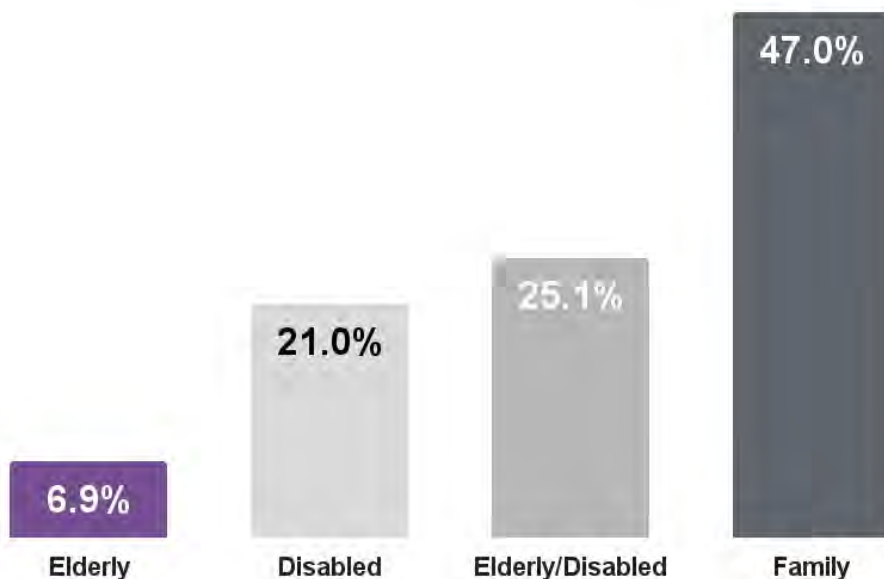
4.6%

FHP DEMOGRAPHICS REPORT

ASSISTED HOUSING PROGRAMS
11,940 Total Number of Families in AHP



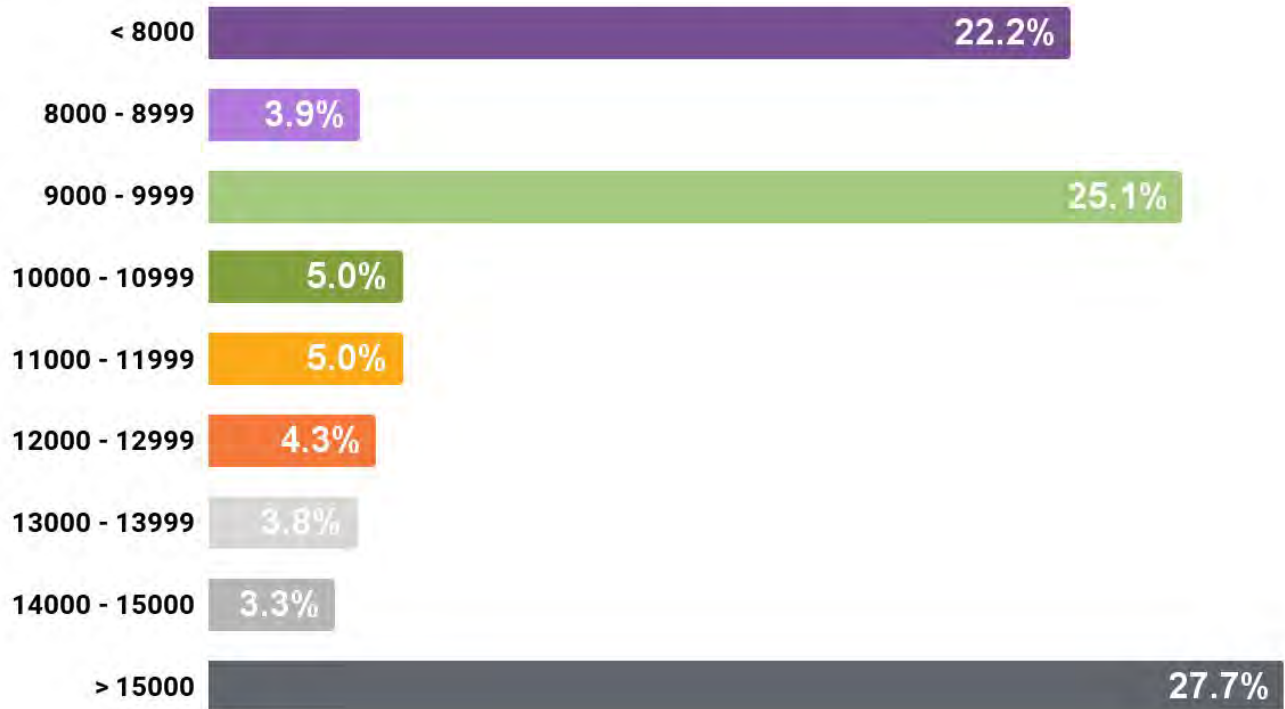
PUBLIC HOUSING PROGRAM
5,582 Total Number of Families in PH



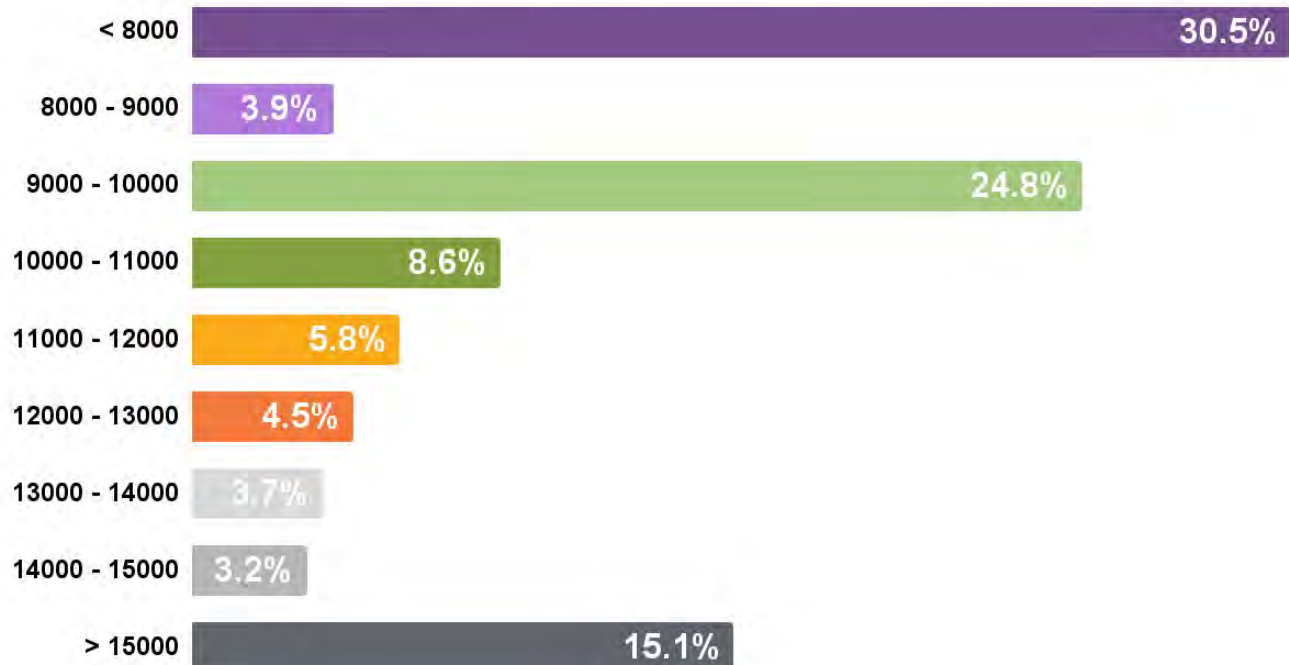
FHP INCOME REPORT

\$9,636 FHP MEDIAN
GROSS INCOME

AHP PERCENTAGE OF HOUSEHOLDS BY GROSS INCOME



PH PERCENTAGE OF HOUSEHOLDS BY GROSS INCOME



AHP UTILIZATION REPORT

ACC* UTILIZATION

86.5%

Units Available per ACC: 13,140



MONTH	JUL	AUG	SEPT
UNITS LEASED	11,591	11,340	11,164
PERCENTAGE	88.2%	86.3%	85.0%

MTW UTILIZATION

92.7%

Units Available per MTW: 12,240



MONTH	JUL	AUG	SEPT
UNITS LEASED	11,570	11,318	11,142
PERCENTAGE	94.5%	92.5%	91.0%

*Units available under the Annual Contributions Contract (ACC) reflect the number of vouchers available for leasing under HUD's funding commitment to the housing choice voucher program. Units available under the MTW baseline reflect the number of vouchers the Agency is obligated to serve under its MTW agreement. As an MTW Agency, SAHA is authorized to utilize HUD funding under the ACC for HUD approved non-leasing activities that support MTW initiatives.

PH OCCUPANCY REPORT

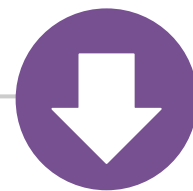
**AVERAGE
OCCUPANCY RATE**
96.1%



MONTH	JUL	AUG	SEPT
UNITS LEASED	5,799	5,786	5,792
UNITS AVAILABLE	6,030	6,030	6,030
PERCENTAGE	96.2%	96.0%	96.1%

AVERAGE NUMBER OF VACANCIES

The average number of vacancies decreased from 249 in FY21-Q4.



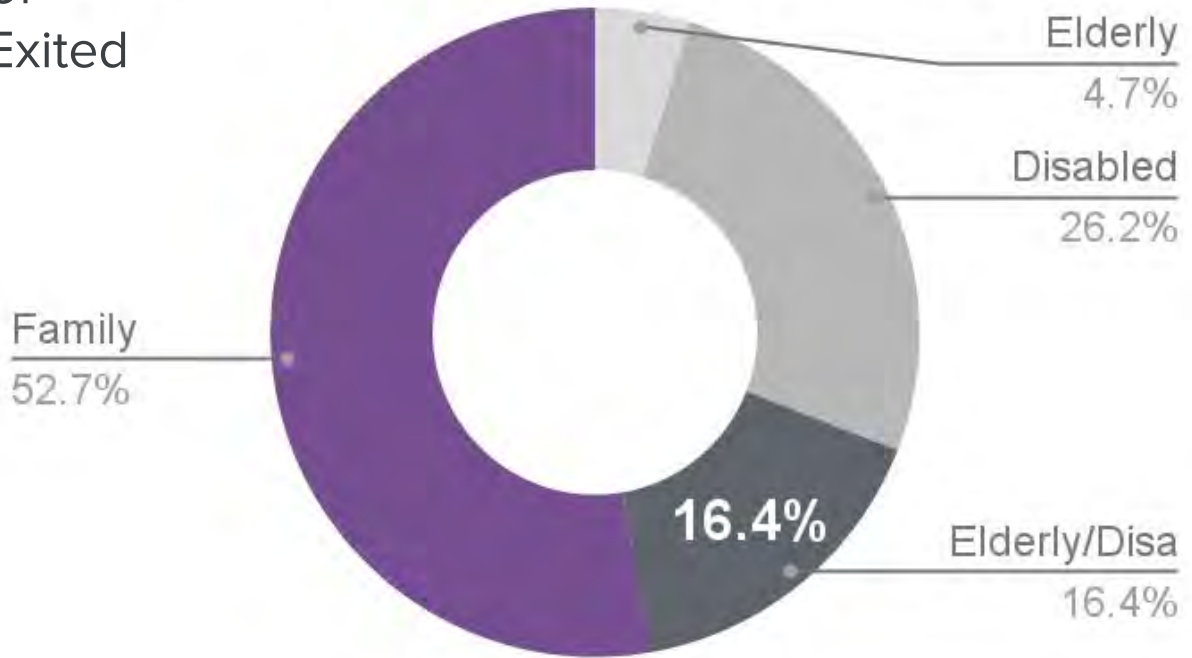
238

FHP PROGRAM EXITS REPORT

HOUSING CHOICE VOUCHER EXITS

Total Number of
AHP Families Exited

275



TOP EXIT REASONS

End of Participation (EOP): 22.9%

Missed Inspection: 15.6%

Vacating Without Notification: 14.2%

6.5 Years

Average Tenure
of Clients Exited

FHP PROGRAM EXITS REPORT

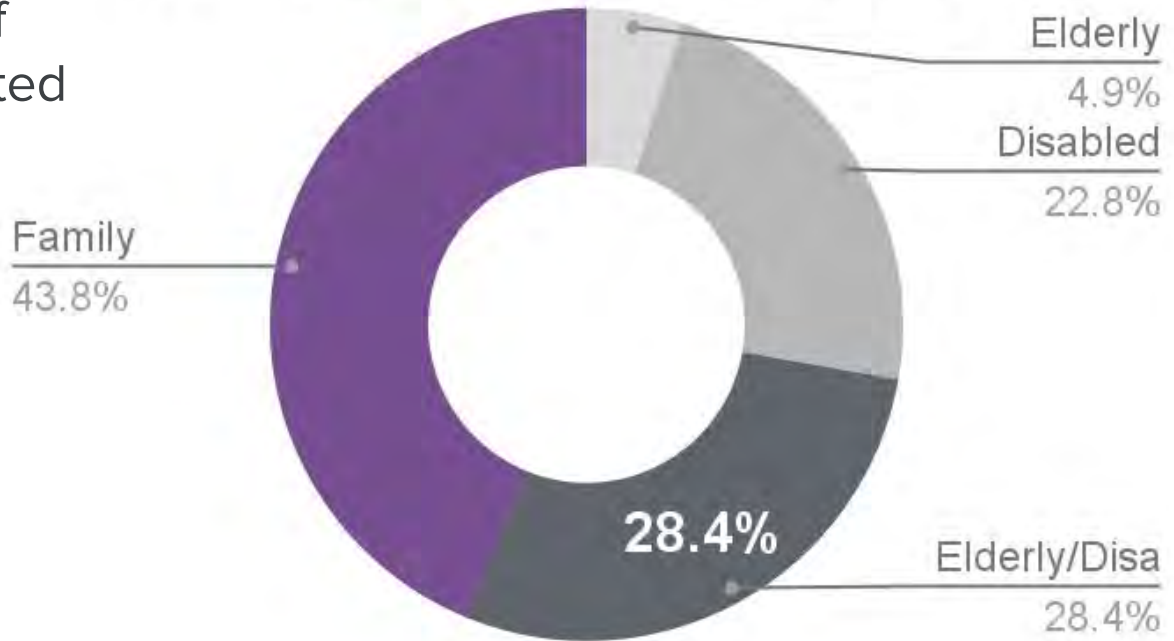
PUBLIC HOUSING EXITS

Total Number of
PH Families Exited

162

Evictions
Through Court

9



TOP EXIT REASONS

Deceased: 22.2%

Moved in with Family: 15.4%

Moved to Section 8: 13.6%

5.2 Years

Average Tenure
of Clients Exited

FHP INFORMAL REVIEW/HEARING REPORT

HOUSING CHOICE VOUCHER PROGRAM

Total Number of
AHP Applicants who
Requested Informal
Review

29

Pending Outcome

62.1%

Overturned

20.7%

Upheld

17.2%

Total Number of
AHP Families
who Requested
Informal Hearing

265

Upheld

3.4%

Overturned

4.9%

Cancelled

15.8%

No show

0.4%

Pending

15.1%

Rescinded

60.4%

Top Reasons for Informal Review (Applicants)

Criminal History: 48.3%

Expired Voucher: 41.4%

Expired RAD-10: 6.9%

Top Reasons for Informal Hearing (Families)

Missed Inspections: 32.5%

**No Response to Recertification
by Mail: 16.2%**

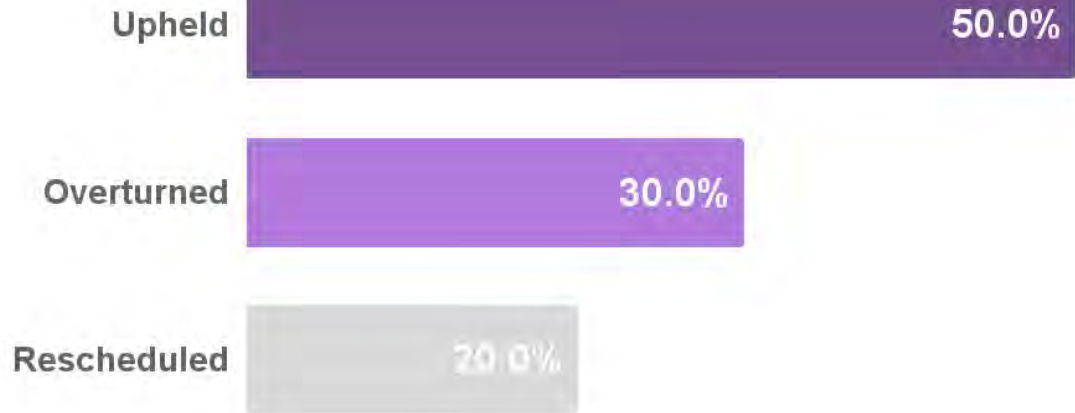
Expired RAD-10: 12.8%

FHP INFORMAL REVIEW/HEARING REPORT

PUBLIC HOUSING PROGRAM

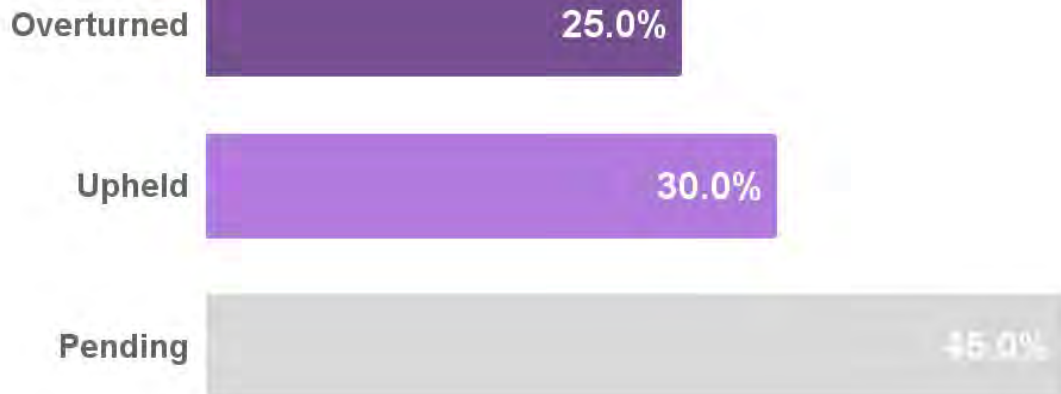
**Total Number of
PH *Applicants*
who Requested
Informal Hearing**

10



**Total Number of
PH *Residents* who
Requested
Informal Hearing**

20



Top Reasons for Informal Hearing (*Applicants*)

Bad Debt: 70.0%

Failure to Complete Eligibility: 20.0%

Violent Criminal History: 10.0%

Top Reasons for Informal Hearing (*Residents*)

Transfer List Withdrawal: 45.0%

Dispute Charges: 35.0%

SAFMR REPORT

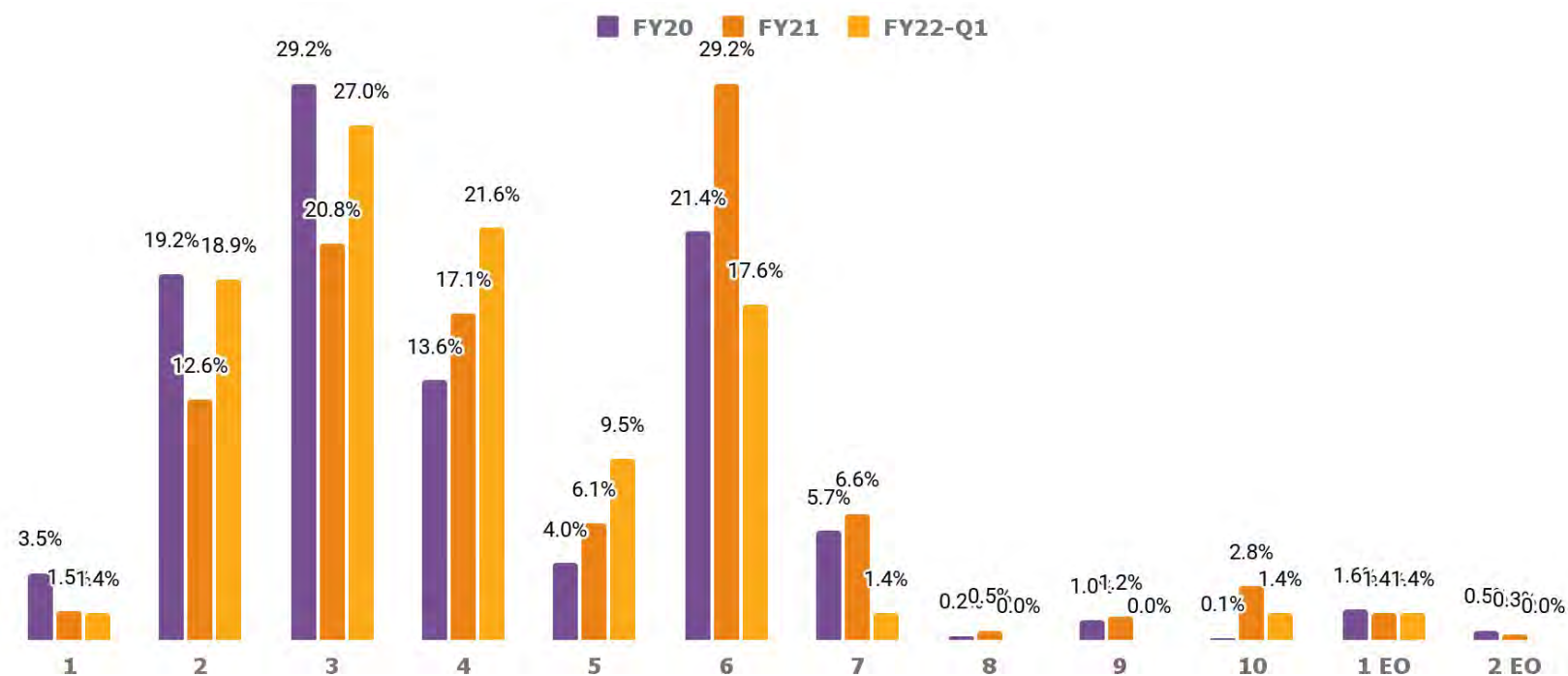
MTW SAFMR

	FY21	FY22-Q1
Average HAP	\$629.28	\$657.50
Average Contract Rent	\$887.84	\$900.50

SAHA's implementation of Small Area Fair Market Rents (SAFMRs) breaks up area zip codes into 10 groups to reflect local neighborhood rental markets. This methodology advances SAHA's long-term goal of providing families with the opportunity to move to their preferred neighborhoods.

New Admissions

The graph below shows a comparison of new admissions between FY20, FY21, and FY22-Q1 by Groups. In FY22-Q1, there were a total of 74 new admissions.



SAFMR REPORT

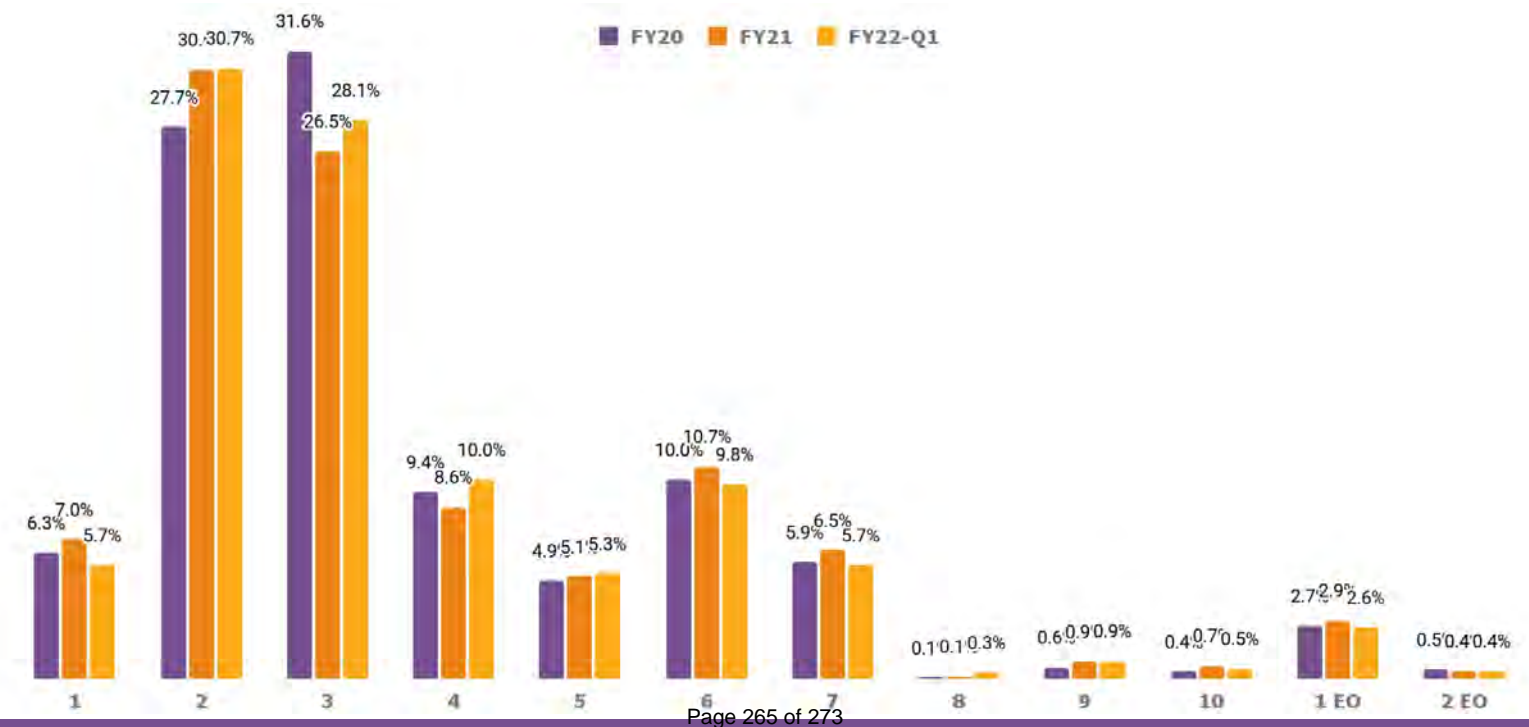
Moves

The graph below shows a comparison of the geographic distribution of moving families between low-cost and high-cost neighborhoods. In FY22-Q1, a total of 68 families moved at the time of their annual reexamination.



In Place

The chart below shows a comparison of in-place families by Groups. In FY22-Q1, a total of 1,254 families stayed in place at the time of their annual reexamination.



PH RENT PAYMENTS

SAHA's eviction moratorium for non-payment of rent has been extended through February 2022. Public Housing residents have been continually informed that SAHA is not evicting at this time due to non-payment of rent, *although rent is still due each month.*

Staff are taking every opportunity to update residents' income to lower their rent payment, if they have experienced any income decreases or hardships, and are also setting up new repayment agreements with extended time frames for residents to make payments toward any debt.

RENT PAYMENT STATUSES

Through staff efforts to communicate all rent payment options to residents, and continually assist with paying back rent and avoiding future debt, we have seen an improvement in the overall number of residents who are able to pay their rent or other charges.

- In June 2021, an estimated average of **71%** residents were able to make their monthly rent payments.
- As of September 2021, an estimated average of **74%** residents were able to make their monthly rent payments, an increase of 3%. The total amount of rent owed was reduced by 8.3%.
- In July, SAHA advertised the City of San Antonio's Emergency Rental Assistance Program to all residents with instructions on how to apply for additional rental assistance.
- As of July 7, SAHA **credited outstanding resident maintenance charges that were incurred during COVID-19** to alleviate some of the balance a resident may owe.

AHP STAFF TRAINING COMPLETED

Below is the number of AHP staff certifications completed to date and the percentage of staff who have completed these certifications. New employees and vacancies are not included.

Certifications completed by AHP Operations staff such as Managers, Asst. Managers and Housing Assistance Specialists.

Fair Housing and Reasonable Accommodation Certification	23	(88%)
---------------------------------------------------------	-----------	--------------

SAHA Leadership Program (optional)	12	(46%)
------------------------------------	-----------	--------------

HCV Financial Management Specialist Certification	5	(19%)
---------------------------------------------------	----------	--------------

HCV Program Management Certification	4	(15%)
--------------------------------------	----------	--------------

Certifications completed by Inspections staff such as Managers, Quality Control (QC) Inspectors and Inspectors.

HQS Certification	15	(100%)
-------------------	-----------	---------------

Additional certifications completed by both Operations and Inspections.

HCV Specialist Certification	25	(61%)
------------------------------	-----------	--------------

Rent Calculation Certification - AHP (optional)	5	(12%)
-------------------------------------------------	----------	--------------

HCV Executive Management Certification	8	(20%)
----------------------------------------	----------	--------------

PH STAFF TRAINING

Below is the number of PH staff certifications completed to date and the percentage of staff who have completed these certifications. New employees and vacancies are not included.

Certifications completed by PH Operations staff such as Community Managers, Asst. Community Managers and Client Services Specialists.

PH Specialist Certification	27	(87%)
PH Management Certification	22	(81%)
Rent Calculation Certification - PH (optional)	12	(36%)

Certifications completed by Maintenance staff such as Maintenance Superintendents, Maintenance Supervisors, Maintenance Technicians.

Certificate for Apartment Maintenance Technicians (CAMT)	34	(68%)
Gas Operator Certification	23	(46%)
Electrical Maintenance Technician Certification (EMT)	59	(100%)

Additional certifications completed by both Operations and Maintenance.

Fair Housing and Reasonable Accommodation Certification	40	(35%)
SAHA Leadership Program (optional)	17	(15%)

FY22-Q1 DEPARTMENT TRAINING

Below is a recap of the various department-wide training courses administered or coordinated by the Operations Support Department during FY22-Q1.

Federal Housing Programs

- Office of the Attorney General (OAG) Reminders Training
- Reasonable Accommodation Reminders Training

Public Housing Programs

- PH Property Management SOP Follow-Up Training

— ANTICIPATED TRAINING —

Below are training topics estimated to be presented to staff during FY22-Q2.

- Check Run, Abatements, Adjustments, Payment Holds (AHP Operations)
- Rent Calculation Refresher (FHP Operations)
- Continuing Customer Service and Working-from-Home (All Staff)
- Trauma Informed Care (All Staff)

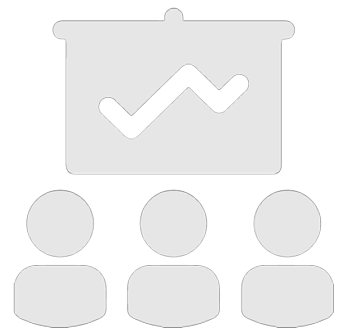
NEW HIRE TRAINING

— ASSISTED HOUSING PROGRAMS —

Below is the number of individuals who completed Housing Assistance Specialist (HAS) New Hire Training in FY22-Q1.

5 NEW HIRES

Completed Training



— PUBLIC HOUSING PROGRAM —

Operations Support has a new hire training curriculum in progress that will be used to onboard new Client Services Specialists (CSS) in Public Housing.

In the interim, a basic training has been created to use when onboarding new CSS staff.

ON THE HORIZON

HCV WAITLIST OPENING

- Waitlist was open Sept. 1 - 17
- A total of 12,756 applications were received
- SAHA hosted 378 in-person appointments to assist with applications
- After waitlist closure, applications were assigned a random number
- Applications assigned 1-5000 were placed onto the waitlist
- Notices to applicants were sent via email and mail to inform them of whether their application was placed on this waitlist
 - Notices to applicants who were not placed on the waitlist included additional resources for rental assistance

OTHER PROGRAM UPDATES

- Establishing PH Eligibility Team at Central Office
 - Hired three CSS staff to the Admissions and Terminations Team
 - Establishing pre-eligibility process for PH
- Implementing a formal process for Informal Conferences at PH properties prior to an Informal Hearing
- Updating Internal Audit Quality Control procedures for AHP and PH
- Working on Electronic Recertification process for AHP and PH
- Updating lobby queuing systems to allow for text check-in and more
 - Installing tablet check-in system in the main lobby



Proposed 2022 Board/Committee Meeting Date

- Board Meetings - 1:00 p.m., First Wednesday
- Resident Services Committee - as needed, locations TBD
- Operations and Real Estate Committee - 1:00 p.m., Third Wednesday
- Finance Committee - 1:00 p.m., Third Wednesday (quarterly)
- Governance Committee - as needed
- Special Board Meetings - dates and times may vary

January 2022 Regular Board: N/A OPRE: Wednesday, January 19	February 2022 Regular Board: Wednesday, February 2 OPRE: Wednesday, February 16 Finance: Wednesday, February 16
March 2022 Regular Board: Wednesday, March 2 OPRE: Wednesday, March 16	April 2022 Regular Board: Wednesday, April 6 OPRE: Wednesday, April 20
May 2022 Regular Board: Wednesday, May 4 OPRE: Wednesday, May 18 Finance: Wednesday, May 18	June 2022 Regular Board: Wednesday, June 1 OPRE: N/A
July 2022 Regular Board: N/A OPRE: Wednesday, July 20	August 2022 Regular Board: Wednesday, August 3 OPRE: Wednesday, August 17 Finance: Wednesday, August 17
September 2022 Regular Board: Wednesday, September 7 OPRE: Wednesday, September 21	October 2022 Regular Board: Wednesday, October 12 OPRE: Wednesday, October 19
November 2022 Regular Board: Wednesday, November 2 OPRE: Wednesday, November 16 Finance: Wednesday, November 16	December 2022 Regular Board: Wednesday, December 7 OPRE: N/A

				Est Closing				Income Mix							
Project Name	District	Developer	Financing	Date	TotalDevCost		# Units	PH	30%	40%	50%	60%	70%	80%	Market
Financing Closed (under Construction)															
1604 Lofts	D2	NRP	4% Tax Credits & Bonds	Closed	\$56,663,651		324		33		0	224		67	0
Aspire at Tampico*	D5	Mission DG	4% Tax Credits & Bonds	Closed	\$34,115,710		200		9	10	18	70	20	9	64
Trader Flats (The Scott)	D4	NRP	4% Tax Credits & Bonds	Closed	\$55,753,169		324		33		0	224		67	0
Artisan at Ruiz	D1	Franklin	9% Tax Credits	Closed	\$21,165,791		102		11		41	50		0	0
Majestic Ranch	D7	Hogan	4% Tax Credits & Bonds	Closed	\$46,084,260		288		0		0	288		0	0
Culebra Crossing	D6	Lynd	HUD 221(d)(4)	Closed	\$50,123,889		327		0		0	0		164	163
Mira Vista	D7	Hogan	4% Tax Credits & Bonds	Closed	\$45,917,596		312		0		0	312		0	0
Kitty Hawk Flats	Converse	NRP	4% Tax Credits & Bonds	Closed	\$40,611,848		212		22		0	135	55		0
Legacy at Alazan*	D5	NRP	9% Tax Credits	Closed	\$19,155,261		88	40				40		0	8
100 Labor	D1	Franklin	HUD 221(d)(4)	Closed	\$52,438,321		213		27		17	0		0	169
Watson Road (Frontera Crossing Apartments)	D4	NRP	4% Tax Credits & Bonds	Closed	\$60,567,278		348			18	18	294	18	0	0
Copernicus (Seven07 Lofts)	D2	NRP	4% Tax Credits & Bonds	Closed	\$55,389,378		318			17	17	267	17	0	0
Vista at Interpark	D9	Atlantic Pacific Comm.	9% Tax Credits	Closed	\$18,290,733		64		7		16	41			
Vista at Everest	D1	Atlantic Pacific Comm.	9% Tax Credits	Closed	\$18,109,812		64		7		16	41			
Bristol at Somerset	D4	Louis Poppoon Development Consulting	4% Tax Credit & Bonds	Closed	\$59,554,244		348		0	0	0	348	0	0	0
Horizon Pointe	D2	Integrated Realty Group	4% Tax Credits & Bonds	Closed	\$59,533,237		312		20	35	106	0	151	0	0
Total					\$693,474,178		3844	40	169	80	249	2334	261	307	404
Board Has Approved															
Board Provided Final Approval															
Potranco	D4	Lynd	Conventional Loan	Pending	\$50,945,546		360		0		0	36		144	180
Josephine	D1	Lynd	Conventional Loan	9/2021	\$61,339,167		259		0		0	26		104	129
Total					\$112,284,713		619		0	0	0	62	0	248	309
Board Approved Bond Inducement															
St. John's Square	D1	Weal	4% Tax Credits & Bonds	Pending Loan	\$71,547,459		252		0		54	0		0	198
Artisan at Springview*	D2	Franklin	4% Tax Credits & Bonds	Pending	\$63,380,512		305		31		0	274		0	0
Palo Alto	D4	Streamline	4% Tax Credits & Bonds	Pending	\$64,725,997		336		16	16	32	244	28		
Victoria Commons - North Pond*	D1	Catellus	4% Tax Credits & Bonds	Pending			TBD		TBD		TBD	TBD		TBD	TBD
Total					\$199,653,968		893		47	16	86	518	28	0	198
Board Approved the Developer															
Victoria Commons - South Pond*	D1	Catellus	HUD 221 (d)(4)	Pending					TBD		TBD	TBD		TBD	TBD
Victoria Commons - Townhomes*	D1	Catellus	TBD	Pending			TBD		TBD		TBD	TBD		TBD	TBD
Snowden Road*	D7	SAHA	9% Tax Credits	Pending	\$25,235,167		135		14		54	67			
Fiesta Trails	D8	NRP	9% Tax Credits	Pending	\$20,389,133		74		8		30	36			
Total					\$45,624,300		209		22	0	170	103	0	0	0
Pending Board Consideration															
Alazan Courts*	D5	TBD	TBD	Pending Board Consideration											
Total					\$0		0	0	0	0	0	0	0	0	0
Grand Total					\$1,051,037,159		5,565	40	238	96	505	3,017	289	555	911

*SAHA owned land