



BOARD OF COMMISSIONERSDr. Ana "Cha" Guzmán
ChairOlga Kauffman
Vice ChairGilbert Casillas
CommissionerDalia Contreras
CommissionerLoren D. Dantzer
CommissionerGabriel Lopez
CommissionerIgnacio Perez
Commissioner**PRESIDENT & CEO**

Ed Hinojosa, Jr.

OPERATIONS AND REAL ESTATE COMMITTEE MEETING**1:15 p.m. | Wednesday | August 17, 2022**

If this meeting becomes a Special Board Meeting, at least four Commissioners will be physically present at this location, and up to three other Commissioners may attend by videoconferencing, as permitted by Tex. Gov't Code Section 551.127, and the Presiding Officer will also be present at this location.

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** - 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 access Phone Number: **(346) 248-7799** and enter Meeting ID: **93839434337#** and Passcode: **654170#**, prior to 1:00 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 Opportunity Home 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 Opportunity Home 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.

PRESENTATIONS

3. Update and Presentation by Able City

INDIVIDUAL ITEMS

4. Consideration and appropriate action regarding Resolution 6268, approving the updated Family Self-Sufficiency Action Plan in accordance with the HUD Final Rule (Joel Tabar, Director of Community Development Initiatives)
5. Consideration and appropriate action regarding Resolution 6269, approving the Single Family Referral Preference for the Public Housing program (Joel Tabar, Interim Director of Public Housing)
6. Consideration and appropriate action regarding Resolution 6270 and 22LVPFC-07-29, concerning the proposed financing of up to \$35,000,000.00 of the costs of the acquisition, rehabilitation, and equipping of the Rosemont at University Park Apartments; an increase in the inducement amount, the reassignment of carryforward designation to obtain volume cap allocation; and other matters in connection therewith (Timothy E. Alcott, Chief Legal and Real Estate Officer)

7. Consideration and appropriate action regarding Resolution 6271, authorizing the award of a contract for Property Management Services for Snowden Senior Apartments to Home Spring Residential Services; for a period of one year with the option to renew up to three additional one year terms (George Ayala, Director of Procurement; Lorraine Robles, Director of Development Services and Neighborhood Revitalization)
8. Consideration and appropriate action regarding Resolution 6272, approving the Interim Administrative Plan updates (Stephanie Rodriguez, Director of Assisted Housing Programs)

DISCUSSION ITEMS

9. Update and discussion regarding Residents Feel Safe Outcomes (Brandee Perez, Chief Operating Officer; Richard Milk, Planning Officer)
10. Discussion regarding Employee Survey Results (Richard Milk, Planning Officer)
11. Discussion regarding Opportunity Home recruitment and staffing update (Aiyana Longoria, Director of Human Resources)
12. Discussion regarding resident concerns
13. *Closed Session

Real Estate/Consultation with Attorney

Deliberate the management, purchase, exchange, lease or value of certain real properties and obtain legal advice regarding related legal issues pursuant to Texas Government Code Sec. 551.072 (real property) and Texas Government Code Sec. 551.071 (consultation with attorney).

- Update and discussion regarding Victoria Commons Development
- Update and discussion regarding Culebra Commons
- Consultation with Attorney regarding Woodhill Apartments

Security Measures/Devices Update/Consultation with Attorney

Deliberate regarding security matters and obtain legal advice regarding legal issues pursuant to Texas Government Code Sec. 551.071 (consultation with attorney) and Texas Government Code Sec. 551.076 (deliberation regarding security devices and security audits)

- Consultation with Attorney regarding Security

Personnel/Consultation with Attorney

Deliberate the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee and obtain legal advice regarding legal issues pursuant to Texas Government Code Sec. 551.074 (personnel) and Texas Government Code Sec. 551.071 (consultation with attorney).

- Consultation with Attorney regarding employment contract/compensation for President and CEO

REPORTS

- Procurement Activity Report
- FHP Quarterly Report
- Resident Services Report
- Insurance Renewal Worksheet

RESOURCE

- Schedule of Units Under Development

14. Adjournment

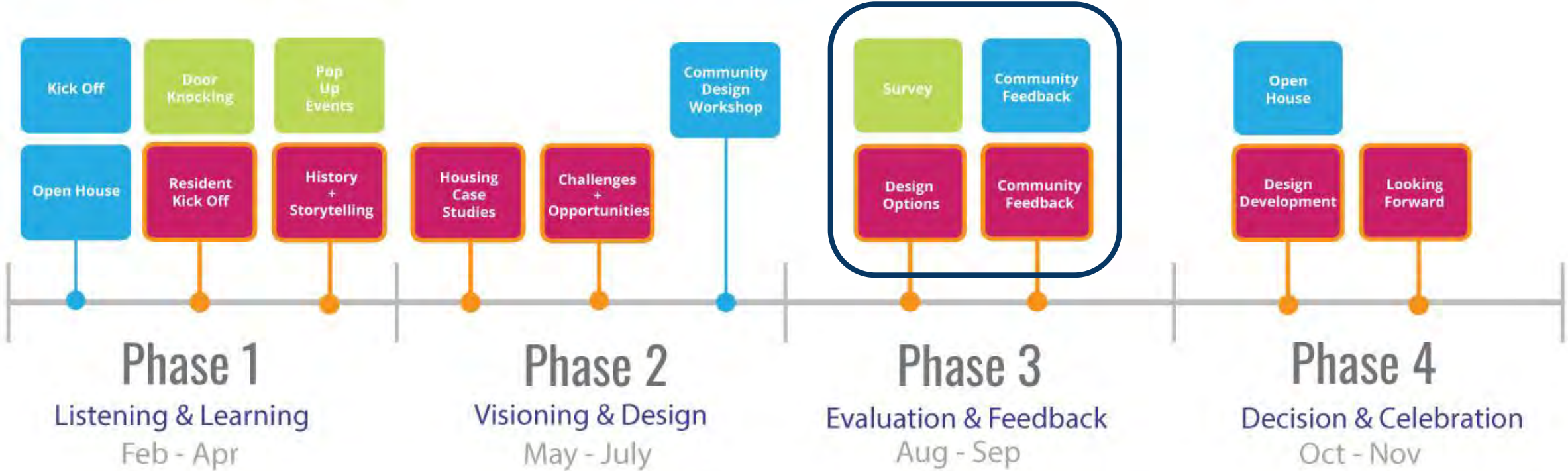
*Note: Whenever the Texas Open Meetings Act (Section 551.001 et seq. of the Texas Government Code) provides for a closed meeting in matters concerning legal advice, real estate, contracts, personnel matters, or security issues, the Board may find a closed meeting to be necessary. For convenience of the 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."

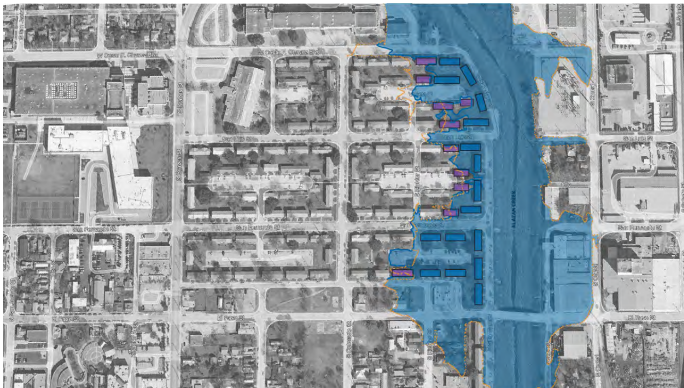
REIMAGINE ALAZAN COURTS





DESIGN CHALLENGES

SHIFTING FLOODPLAIN



Changes to the FEMA floodplain maps will require the demolition of some buildings at Alazan Courts and limit area for future development.

CHANGING HOUSING DEMAND

	ALAZAN COURTS	PUBLIC HOUSING WAITLIST
EFF/1 BED	10%	55%
2 BEDROOM	80%	40%
3 BEDROOM+	10%	15%

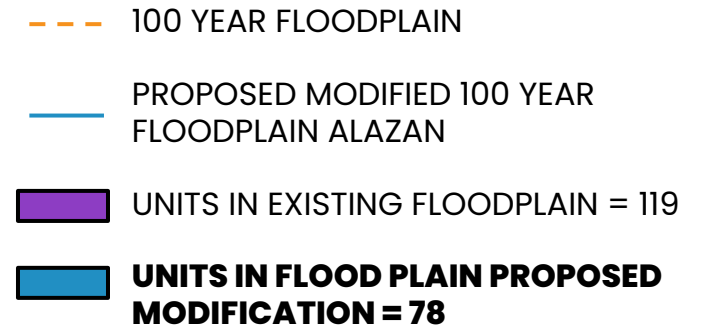
The current unit mix at Alazan Courts does not meet the current housing demand. There is the opportunity to shift the unit mix, to better meet the needs of today.

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RECONFIGURE UNITS MEANS ADDING MORE BUILDINGS



The existing buildings will need to be reconfigured to meet new unit size requirements. There is the opportunity to provide more ground-floor accessible units.



FLOODPLAIN REGULATIONS



No new construction or substantial renovation within the footprint of the 100-year floodplain

Proposed UDC amendment may allow building within footprint but above the flood elevation. Would create possibility for new construction within floodplain.

Currently updating 100-year floodplain maps. To be approved by City Council in Fall 2022 and FEMA in 2024.

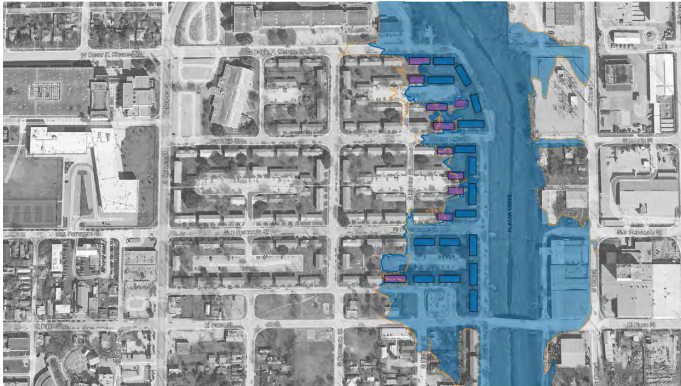
Timeline will create uncertainty about which map each regulatory body will use in their review processes.

Westside Creeks Project (\$75M) project is dedicated to solely to ecosystem restoration. Funds cannot not be used to increase or modifying drainage.

There are currently no other major projects planned for Alazan Creek.

FLOODPLAIN – NEXT STEPS

DESIGN TO BE BASED ON CURRENT REGULATIONS



Design team will use the floodplain established by the Opportunity Home's Letter of Modification Request as the basis of design for the masterplan.

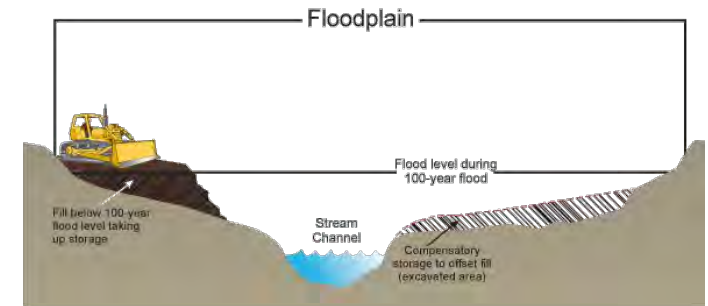
ADDITIONAL ANALYSIS BY CIVIL ENGINEER



Civil engineer will review all regulations and timelines to understand possibilities to altering floodplain requirements on-site. Report will be shared publicly.

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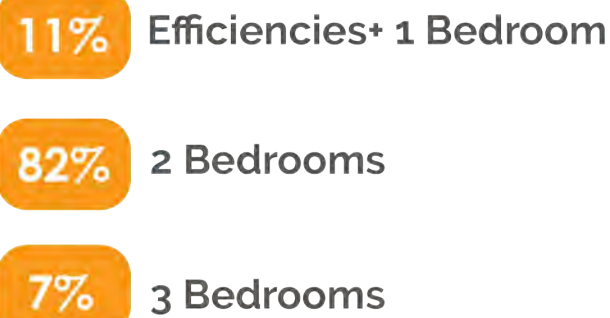
EXPLORING ON-SITE MITIGATION



Design team to do preliminary investigation of modifying existing site to protect more existing buildings. Detailed study would happen in next design phase.

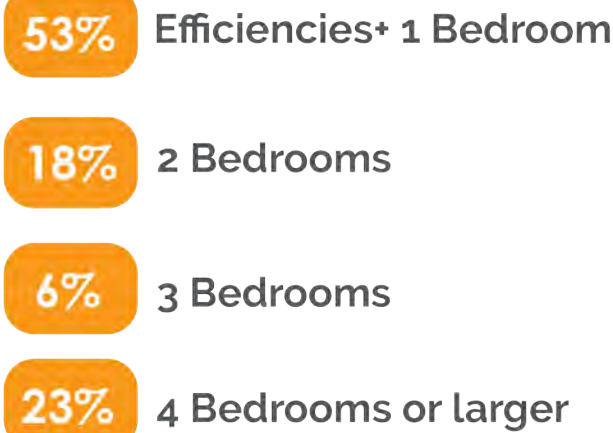
UNIT MIX

ALAZAN COURTS TODAY



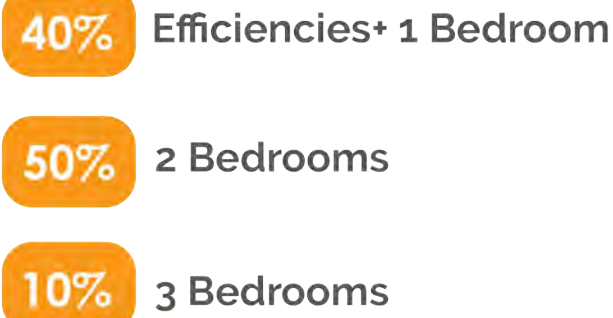
Built in 1939, Alazan Courts has a majority of 2-Bedroom units. This has influenced what types of families live there and has shaped the character of the community today.

OPPORTUNITY HOME WAITING LIST



Today there is a high demand for 1-Bedroom units on Opportunity Home's public housing waitlist.

PROPOSED MIX FOR FUTURE ALAZAN COURTS



The masterplan proposes to increase the number of 1-bedroom units while still maintaining a majority of larger units.

In order to continue to serve the same number of residents, we must maintain the same number of bedrooms (979).

PROPOSED MIX FOR FUTURE ALAZAN COURTS

- 40%** Efficiencies+ 1 Bedroom
- 50%** 2 Bedrooms
- 10%** 3 Bedrooms

To achieve 979 bedrooms with the proposed unit mix, we will need 577 units at Alazan Courts in the future.

PROPOSED MIX FOR FUTURE ALAZAN COURTS

- 40%** Efficiencies+ 1 Bedroom
- 50%** 2 Bedrooms
- 10%** 3 Bedrooms

**WE NEED TO
SOLVE FOR...**

EXISTING BUILDINGS

**UNITS AT ALAZAN
COURTS TODAY:**

**501 Units
(979 Bedrooms)**

**REDUCTION DUE
TO FLOODPLAIN:**

**-74 Units
(136 Bedrooms)**

**REDUCTION DUE TO
PLAN RECONFIGURATION:**

**-90 Units
(281 Bedrooms)**

**UNITS IN EXISTING
ALAZAN COURTS
BUILDINGS TO REMAIN**

**337 Units
(562 Bedrooms)**



NEW CONSTRUCTION REQUIRED

**UNITS IN EXISTING
ALAZAN COURTS
BUILDINGS TO REMAIN**

**337 Units
(562 Bedrooms)**

**UNITS ADDED THROUGH
NEW CONSTRUCTION:**

**+240 Units
(420 Bedrooms)**

**UNITS AT ALAZAN
COURTS IN THE FUTURE:**

**577 Units
(982 Bedrooms)**



COMMUNITY DESIGN WORKSHOP



DISTRIBUTION OF 240 NEW UNITS

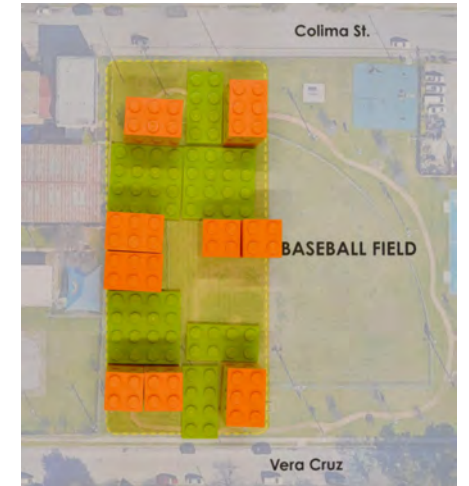
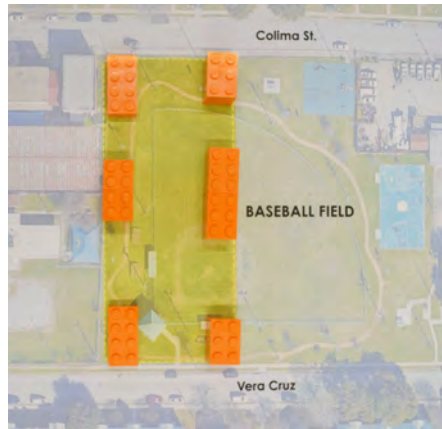
110 UNITS ONSITE

**130 UNITS ON VALERO FIELD +
UNDERUTILIZED SPACE AT APACHE
COURTS**



337 UNITS ONSITE

COMMUNITY IDEAS ABOUT VALERO FIELD + APACHE COURTS



PROPOSED DEVELOPMENT AT VALERO FIELD + APACHE COURTS



COMMUNITY IDEAS ABOUT ADDING TO ALAZAN COURTS.



1. MAINTAIN THE STREET

- Preserves all existing buildings along the streets
- Buildings within the courtyards are 3 stories
- New small park/playground at every interior courtyard
- New Community Center anchors new creekside park

Onsite
Homes in Rehabilitated Buildings **258**
Homes in New Buildings **189**
Apache / Ballfield Units
Homes in New Buildings **130**

Total: 577



- Preserved Building One Story
- Preserved Building Two Story
- Community Center
- New Construction Two Story
- New Construction Three Story
- Green Space
- Park/Playground
- Floodplain

1. MAINTAIN THE STREET

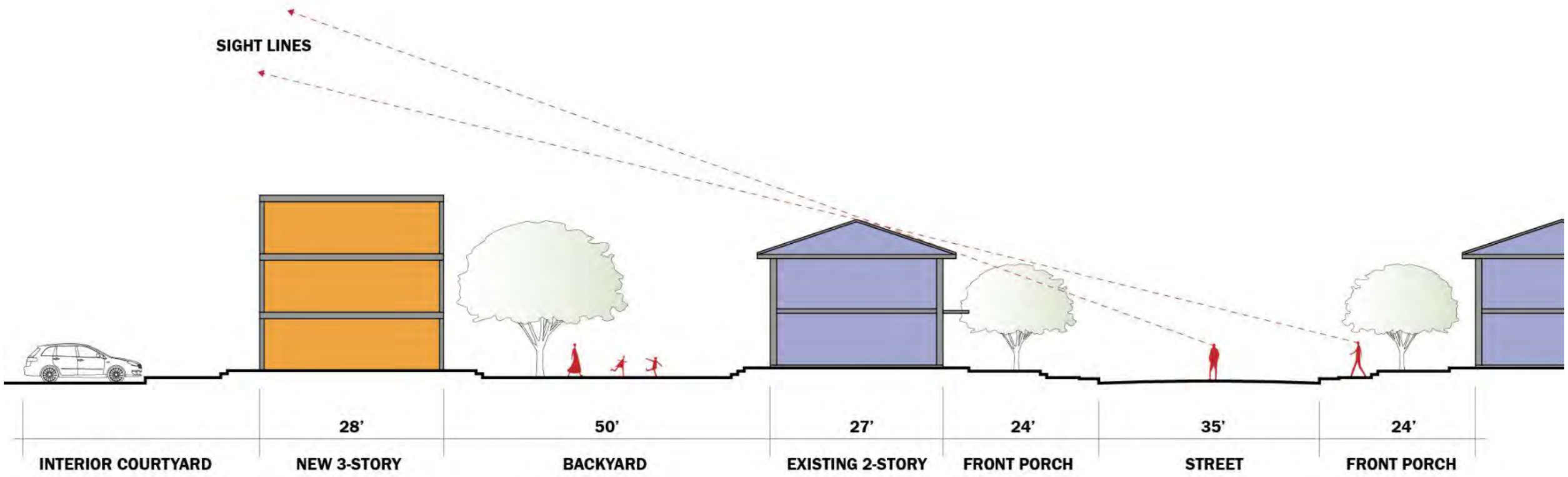
- Preserves all existing buildings along the streets
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- New Community Center anchors new creekside park

Onsite
Homes in Rehabilitated Buildings **258**
Homes in New Buildings **189**
Apache / Ballfield Units
Homes in New Buildings **130**

Total: 577



SIGHT LINES + BUILDING HEIGHTS



2. PRESERVE THE CORE

- Preserves the central core of the neighborhood.
- Higher intensity new buildings along creek.
- Small park at every courtyard, larger park near creek.
- New Community Center and new buildings along Brazos St.

Onsite	
Homes in Rehabilitated Buildings	213
Homes in New Buildings	214
Apache / Ballfield Units	
Homes in New Buildings	130

Total: 577



2. PRESERVE THE CORE

- Preserves the central core of the neighborhood.
- Higher intensity new buildings along creek.
- Small park at every courtyard, larger park near creek.
- New Community Center and new buildings along Brazos St.



Onsite	
Homes in Rehabilitated Buildings	213
Homes in New Buildings	214
Apache / Ballfield Units	
Homes in New Buildings	130

Total: 577

	Preserved Building One Story		Preserved Building Two Story
	New Building Two Story		Green Space
	New Construction Three Story		Park/Playground
	Community Center		

3. MAINTAIN HEIGHT + STREETSCAPE

- Preserves most existing buildings along the streets.
- New construction is limited to two-stories.
- Add 23 additional public housing homes (total 600)
- New community center anchors new creekside park.



- Preserved Building One Story
- Preserved Building Two Story
- Community Center
- New Construction Two Story
- New Construction Three Story
- Green Space
- Park/Playground
- Floodplain

Onsite	
Homes in Rehabilitated Buildings	198
Homes in New Buildings	272
Apache / Ballfield Units	
Homes in New Buildings	130

Total: 600

3. MAINTAIN HEIGHT + STREETSCAPE

- Preserves most existing buildings along the streets.
- New construction is limited to two-stories.
- Add 23 additional public housing homes (total 600)
- New community center anchors new creekside park.

Onsite	
Homes in Rehabilitated Buildings	198
Homes in New Buildings	272
Apache / Ballfield Units	
Homes in New Buildings	130

Total: 600



4. MAXIMIZE GREEN SPACE

-Preserves most of the existing buildings along the streets.

-Adds 58 additional public housing homes. (total 625)

-New large park/playground at every interior courtyard.

-New Community Center anchors new large creekside park.

Onsite	
Homes in Rehabilitated Buildings	194
Homes in New Buildings	301
Apache / Ballfield Units	
Homes in New Buildings	130

Total: 625



- Preserved Building One Story
- Preserved Building Two Story
- Community Center
- New Construction Two Story
- New Construction Three Story
- Green Space
- Park/Playground
- Floodplain

4. MAXIMIZE GREEN SPACE

- Preserves most of the existing buildings along the streets.
- Adds 58 additional public housing homes. (total 625)
- New large park/playground at every interior courtyard.
- New Community Center anchors new large creekside park.

Onsite	
Homes in Rehabilitated Buildings	194
Homes in New Buildings	301
Apache / Ballfield Units	
Homes in New Buildings	130

Total: 625



- New Building Two Story
- New Construction Three Story
- Community Center

- Preserved Building One Story
- Preserved Building Two Story
- Green Space
- Park/Playground

OTHER OPPORTUNITIES

**?? UNITS ANOTHER PARCEL
TO BE ACQUIRED BY OPPORTUNITY
HOME**



COMMUNITY SURVEY

COMMUNITY SURVEY

**AUGUST 20th
PUBLIC MEETING**

**DOOR TO DOOR AT
ALAZAN COURTS**

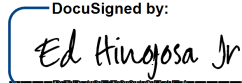
**COMMUNITY
EVENTS**

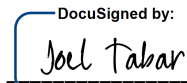
**EMAILED TO
FRIENDS OF
ALAZAN LIST**

ONLINE SURVEY

**MEDIA / SOCIAL
MEDIA OUTREACH**

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022****BOARD OF COMMISSIONERS
Operations and Real Estate Committee****RESOLUTION 6268, APPROVING THE UPDATED FAMILY SELF-SUFFICIENCY ACTION PLAN IN ACCORDANCE WITH THE HUD FINAL RULE**

DocuSigned by:

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Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 F2357C3B96D74FD...
Joel Tabar
Director of Community Development Initiatives

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6268, approving the updated Family Self-Sufficiency Action Plan in accordance with the HUD Final Rule.

FINANCIAL IMPACT:

With the change in the FSS Program rules, forfeited escrow funds may no longer be used toward HAP payments, staff salaries or fringe benefits, general administrative expenses of the FSS program, public housing operating funds, or any other activity determined ineligible.

Forfeited escrow funds may only be used for resident supportive services, FSS staff training, or other approved uses.

SUMMARY:

On May 17, 2022, the U.S. Department of Housing and Urban Development (HUD) published the *Family Self-Sufficiency (FSS) Final rule*, which details numerous substantial changes to the FSS program, effective June 16, 2022.

The new rule requires changes to the escrow calculation formula, eligibility requirements, FSS contract expiration date calculation, forfeited escrow policy, program graduation requirements, extension policy, termination policy, escrow account depositing policy, and enrollment policy.

HUD requires Opportunity Home San Antonio (Opportunity Home) to revise or establish policies in the FSS Action Plan no later than November 14, 2022. Upon approval of this resolution, language will be added to the FY2022-23 FSS Action Plan to address implementation of the Final Rule.

A summary of the major changes being made are included in the table below:

Current Rule	Final Rule to be Implemented
Funding	
Project-Based Rental Assistance (PBRA) programs may run their own FSS program with no funding.	PBRA FSS is now funded by HUD and may operate under the existing FSS program. Escrow for PBRA participants must be maintained by the PBRA owner, who must sign a cooperative agreement with Opportunity Home.

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

	Opportunity Home is not moving forward with implementing FSS at our PBRAs at this time.
Funding rule not codified.	Codified that funding for 25 participants is for 1 Resident Services Coordinator (RSC), and 50 participants for each additional ratio.
Enrollment	
Only the Head of Household can sign a Contract of Participation (COP).	Any person 17+ on the lease may sign a COP. Only one COP per family, family unit must consent to whomever is contracting into FSS for their family.
Section 8(Y) HCV Homeownership, Moderate Rehabilitation (MOD Rehab), and Moderation Rehabilitation Single Room Occupancy (SRO) vouchers are not eligible for FSS.	All voucher types are eligible for FSS, including Section 8(Y) HCV Homeownership, MOD Rehab, and MOD Rehab SRO
End date of COP is five years after the contract effective date.	COP end date is five years after the first interim or annual reexamination certification that occurs after the effective date of the COP.
Flexibility on whether to request a new certification if the current is older than 120 days, or just use the old certification for the COP.	Can only use the most recent certification to contract, regardless of the certification "age." A participant may choose to delay enrollment until a new certification is completed to reflect lower income upon enrollment.
Escrow	
Escrow calculation caps at 50% AMI and starts decreasing until the family hits 80% AMI. When the family hits 80% AMI, no escrow is accrued.	No cap on escrow calculation until the family hits 80% AMI. When the family hits 80% AMI, escrow calculation stops.
No restrictions on use of forfeited escrow funds.	Forfeited escrow funds may only be used for the FSS program (Resident Service Coordinator training, supportive service requests for participants). Forfeited funds for both PH and HCV will be in the same "pot."
Escrow must be deposited at a minimum on an annual basis.	Escrow must be deposited monthly.
Extensions	
Extensions may only be granted for "good cause" (reasons outside a person's control).	Extensions may now be granted for the sake of completing a goal, if the participant is actively involved in a goal activity at the time of extension request.
Graduation	

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

Housing Choice Voucher (HCV) participants automatically graduate when they reach 30%.	30% is no longer a means of graduating. HCV participants who reach 30% will continue in the program until they have met their Individual Training and Services Plan (ITSP) goals and request graduation.
Participants must be TANF free for one year prior to graduation.	Participants must provide proof of being TANF free on their graduation date only. There is no timeframe for maintaining a TANF free status.
Rule regarding adding additional requirements in PIH notice, but not codified.	Rule officially codified. PHAs may not require/mandate any additional graduation requirements. We have already repealed our practice of requiring everyone to have a financial empowerment goal and education goal. We must now repeal our mandate that participants complete a year of full time employment.
Any kind of termination from the program results in forfeited escrow.	Select cases where participants may terminate and still receive their accumulated escrow: If essential services are not available, if the contracted participant becomes disabled/otherwise unable to complete their COP/ITSP and no other person on the lease can take over the COP, or if a family ports outside jurisdiction to a location without FSS and cannot complete their ITSP prior to leaving.

STRATEGIC OUTCOME:

Opportunity Home residents have a sufficient supply of affordable housing options.

ATTACHMENTS:

Resolution 6268

Final Rule Changes FY 2022-2023 FSS Action Plan Revision Summary

Presentation

**San Antonio Housing Authority
Resolution 6268**

RESOLUTION 6268, APPROVING THE UPDATED FAMILY SELF-SUFFICIENCY ACTION PLAN IN ACCORDANCE WITH THE HUD FINAL RULE

WHEREAS, on May 17, 2022, the U.S. Department of Housing and Urban Development (HUD) published the Family Self-Sufficiency (FSS) Final Rule, which details substantial changes to the FSS program; and

WHEREAS, HUD requires housing authorities to update their Action Plans in accordance with the final rule and implement the new rules by no later than November 14, 2022; and

WHEREAS, upon approval of this resolution, language will be added to the Fiscal Year (FY) 2022-23 FSS Action Plan to address implementation of the Final Rule.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6268, approving the updated Family Self-Sufficiency Action Plan in accordance with the HUD Final Rule.
- 2) Authorizes the President and CEO or designee to execute all necessary documents and extensions.

Passed and approved the 7th day of September 2022.

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

Attested and approved as to form:

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



Summary of Revisions to FY2022-23 Family Self-Sufficiency (FSS) Action Plan

The proposed FY 2022-23 Family Self-Sufficiency (FSS) Action Plan includes both substantive and material changes to current FSS Program administration or policies in accordance with the Final FSS Rule published by the U.S. Department of Housing and Urban Development (HUD) on May 17, 2022 and effective on June 16, 2022.

Language was updated in the following chapters of the FSS Action Plan:

- Chapter 2: Purpose, Scope, and Applicability of the FSS Program
- Chapter 4: Selecting and Serving FSS Families
- Chapter 5: Contract of Participation
- Chapter 6: Escrow Account

These updates have been made to provide accuracy and greater clarity to FSS program staff and participants.

Indicates policy has been added

~~**Indicates policy has been removed**~~

2.4.A. DEFINITIONS [24 CFR 984.103]

- (9) **“Eligible families”** for the public housing FSS Program means current residents of public housing, and for the Housing Choice Voucher (HCV) FSS Program, means current HCV and HCV Homeownership program participants, Moderate Rehabilitation, Moderate Rehabilitation Single Room Occupancy, and Family Unification Program participants.
 - (a) Eligible families also include current residents of public housing and HCV participants who participate in other local self-sufficiency programs.
- (10) **“Enrollment”** means the date that the FSS family entered into the contract of participation with Opportunity Home.
- (11) **“Family Self-Sufficiency Program”** or **“FSS Program”** means the program established by Opportunity Home within its jurisdiction to promote self-sufficiency among participating families, including the



provision of supportive services to these families, as authorized by Section 23 of the 1937 Act.

- (12) **“FSS account”** means the FSS escrow account authorized by Section 23 of the 1937 Act.
- (13) **“FSS credit”** means the amount credited by Opportunity Home to the participating family’s FSS account.
- (14) **“FSS family”** or **“participating family”** means a family that resides in public housing or receives assistance under the rental voucher programs that elects to participate in the FSS Program and whose designated head of FSS household has signed the contract of participation.
- (15) **“FSS-related service program”** means any program, publicly or privately sponsored, that offers the kinds of supportive services described in the definition of **“supportive services.”**
- (16) **“FSS slots”** refer to the total number of public housing units or the total number of rental vouchers that comprise the minimum size of Opportunity Home’s respective Public Housing FSS Program or HCV FSS Program.
- (17) **“FY”** means federal fiscal year (starting with October 1, and ending September 30, and designated by the calendar year in which it ends).
- ~~(18) **“Head of FSS family”** means the adult member of the FSS family who is the head of the household for purposes of determining income eligibility and rent.~~
- (18) **“Head of FSS Family”** means the adult member of the household appointed by the FSS Family to sign the FSS COP.

4.1.B. INCENTIVES FOR PARTICIPATION [24 984.201(d)(5)]

- (1) By regulation, the FSS Action Plan must include Opportunity Home’s incentives plan—a description of the incentives that Opportunity Home intends to offer eligible families to encourage their participation in the FSS Program.
- (2) The incentives plan provides for the establishment of the FSS escrow account and any other incentives designed by Opportunity Home.
- (3) In accordance with HUD regulations, Opportunity Home will offer the incentive services identified in the Opportunity Home Incentives for Participation Grid below.



Opportunity Home Incentive Services for Participation Grid

Incentive Service Category	Service Provider*	Service Description
FSS Escrow Account	Opportunity Home	An interest-bearing escrow account where the difference from baseline rent and rent increase due to income increases is deposited and accrued on a monthly basis.
<u>FSS Program Fund</u>	<u>Opportunity Home</u>	<u>A fund created from forfeited escrow accounts to be used for FSS program-related support such as supportive service requests by FSS families or training of FSS Resident Service Coordinators to enhance service delivery.</u>
Case Management	FSS Case Management Specialists Resident Service Coordinators	An enhanced support system and holistic case management which includes ongoing individual assessment, service plan development, follow-up/monitoring of ITSP progress and career exploration or coaching.
Referral and Service Information	FSS Case Management Specialists Resident Service Coordinators	Enhanced access to educational, training, and employment opportunities. Access to free or reduced cost services and access to multiple financial literacy, credit building, home buying, car buying, and other important life skill workshops.
Partner Supportive Services Information	FSS Case Management Specialists Resident Service Coordinators;	Collaborative services and/or referrals to approved partner agencies for services similar to those listed above.



A COMMUNITY OF POSSIBILITIES

	Agency Partners	
Other**	FSS Case Management Specialists <u>Resident Service Coordinators</u> ; Agency Partners; Opportunity Home	Collaborative services and/or referrals not otherwise included within the services above, which may be due to seasonal or emergency events as needed.
<p>**"Service Provider" is defined as the primary party responsible for delivering the selected incentive service through the Opportunity Home's Community Development Initiatives (CDI) department. In accordance with HUD regulations and subject to Opportunity Home policy, CDI staff provide resident services coordination, which may also include collaboration with the following parties:</p> <ul style="list-style-type: none"> • Internal Opportunity Home stakeholders involved in Opportunity Home program administration, as deemed necessary and appropriate by department leadership. • External community partners that represent nonprofits, community-based organizations and other government entities. • Other individuals, advocacy groups and community stakeholders, as deemed necessary and appropriate by Opportunity Home leadership. <p>***"Other" is defined as additional supportive services and resources that, in accordance with HUD regulations and Opportunity Home policy, may become available through internal staff or community support.</p>		

5.1.B. CONTENTS OF THE CONTRACT OF PARTICIPATION

(1) Individual Training and Services Plan

As part of the required contents of the FSS contract of participation (COP), the ITSP establishes specific interim and final goals by which Opportunity Home and the family measure the family's progress toward fulfilling its obligations under the contract of participation and becoming self-sufficient.

- (a) Interim and final goals will differ depending on the family's individual needs.



- (b) Further, regulations require the establishment of an ~~interim~~ final goal regarding independence from welfare assistance.

(2) **Interim Final Goals**

For each participating FSS family, Opportunity Home must establish as a final goal that receives welfare assistance, Opportunity Home must establish as an interim goal that the family become independent from welfare assistance ~~and remain independent from welfare assistance for at least one year before on~~ the expiration of the term of the contract of participation, including any extension thereof [24 CFR 984.303(b)(2)].

- (a) ~~At its discretion, Opportunity Home may also elect to suggest this as an interim goal in the ITSP regardless of whether a family is receiving welfare assistance at the time the COP is developed.~~

- (b) ~~If the family is not receiving cash welfare assistance (TANF) at the time the contract of participation is being developed, Opportunity Home will not suggest to each family participating in the FSS Program that the family include an interim goal on its ITSP for the family to become independent from cash welfare assistance and remain cash welfare-free for at least one year before the expiration of the term of the contract of participation.~~

5.1.C. FAMILY OBLIGATIONS

(1) FSS Family in Good Standing

For an FSS Family to be considered in good standing they must be in compliance with their FSS COP, have satisfied or be current on any debts owed to Opportunity Home, and be in compliance with the regulations regarding participation in the relevant rental assistance program.

(+) (2) Compliance with Lease Terms

One of the obligations of the FSS family according to the contract of participation is to comply with the terms and conditions of the public housing lease or HCV program assisted lease [24 CFR 984.303(b)(3)].

- (a) Inability to comply with the lease represents an inability to comply with the contract, therefore regulations regarding noncompliance with the FSS contract apply [see 24 CFR 984.303(b)(5)].



- (b) It is up to Opportunity Home to determine the plan of action for FSS families found in noncompliance with the lease and how Opportunity Home will precisely define the term **comply with the lease**.

- (c) For the purposes of the FSS Program, **comply with the lease** means the FSS family has not been evicted for repeated or serious violations of the lease; or if they have been evicted for serious or repeated violations of the lease, the family has prevailed in either the grievance hearing or the informal hearing process.

(2)(3) Employment Obligation [24 CFR 984.303 (b)(4)]

Another obligation set forth by the contract of participation is for the head of the FSS family to **“seek and maintain suitable employment”** during the term of the contract and any extension.

- (a) Although other members of the FSS family may seek and maintain employment during the term of the contract, it is only a requirement for the head of the FSS family.
- (b) The obligation for the head of the FSS family to **“seek employment”** is defined in the regulatory language as meaning that the head of the FSS family has applied for employment, attended job interviews, and has otherwise followed through on employment opportunities.
- (i) However, this definition still leaves room for policy decisions on the part of Opportunity Home because it does not define the level of activity involved in “seeking.”
- (c) There is no regulatory definition of **“maintain employment.”**
- (i) For this reason, it is up to Opportunity Home to define the term.
- (d) In addition, there is no minimum period of time that an FSS head of household needs to be employed in order to meet its contract of participation requirements [Notice PIH 93-24, G-9].
- (e) According to regulations, Opportunity Home, in agreement with the affected participant, makes a determination of suitable employment based on the skills, education and job training of the FSS head of household, and based on the available job opportunities within the jurisdiction served by Opportunity Home with the consideration of



the receipt of other benefits of the participant. [24 CFR 984.303(b)(4)(iii)].

(i) This means that ~~Opportunity Home~~ the FSS head of household, has the ultimate responsibility for making the decision regarding the suitability of employment.

~~(ii) However, this decision must be made in conjunction with the head of the FSS family [Notice PIH-93-24, G-3].~~

- (f) For purposes of Opportunity Home's FSS Program, **"seek employment"** means the head of household has applied for employment, attended job interviews and otherwise followed through on employment opportunities as outlined in the ITSP of their contract of participation (COP).
- (g) **"Suitable employment"** ~~means employment as outlined in the ITSP of the COP will be determined by an agreement with the affected participant, will involve consideration of the receipt of other benefits of the participant,~~ and is based on the assessment of the available job opportunities in the area in which the FSS family resides as well as life circumstances, personal goals, skills, education and job training of the head of household.
- (h) **"Maintain employment"** means that the FSS head of household will complete all of the obligations outlined in the ITSP of their COP, ~~and be employed full-time or employed part-time and enrolled in part-time training/education concurrently.~~
- ~~(i) If the head of the family's skills, education and job training do not provide access to full-time work opportunities in the area in which the FSS family resides on the last effective day of the COP or be employed and enrolled, and participating as agreed, in a part-time education or training program on the last effective day of the COP.~~
- ~~(ii)~~(i) Opportunity Home will require third-party verification of this employment ~~and/or enrollment.~~



5.2 CONTRACT SPECIFICATIONS

5.2.A. OVERVIEW

- (1) In addition to making clear the family's obligations under the program, the contract of participation contains specific terms and conditions, including those governing contract modifications, terminations, and grievance procedures.
- (2) This part describes those specifications and associated policies.

5.2.B. CONTRACT TERM [24 CFR 984.303(c)]

- (1) The contract term is five years after the first income certification upon enrollment in the FSS program.
 - (a) This means that the family may have anywhere between 5-10 years ~~has no more than five years~~ from the effective date of the COP to fulfill their obligations as specified in the contract.
 - (b) ~~This five-year term requirement will be specified in the COP. The end date will be written into the COP, communicated to the FSS family, and signed by Opportunity Home and the FSS head of household once the end date of the COP has been identified.~~

(2) **Contract Extension [24 CFR 984.303(d)]**

While the term set forth in the contract of participation is for five-~~ten~~ years, contract extensions are possible.

- (a) According to regulation, PHAs will for "good cause" extend the term of the contract for a period not to exceed two years for any FSS family that requests an extension of the contract in writing.
- (b) The family's written request for an extension must include a description of the need for the extension.
- (c) **Good cause** means circumstances beyond the control of the FSS family, as determined by Opportunity Home, such as a serious illness or involuntary loss of employment (further defined by Opportunity Home policy in Section 5.1.D) or any circumstance that Opportunity Home determines warrants an extension as long as Opportunity Home is consistent with its determinations.



- (i) Extension of the contract of participation will entitle the FSS family to continue to have amounts credited to the family's FSS account.

(ii) Circumstances that Opportunity Home determines may warrant an extension are when a FSS head of household is actively engaged in meeting an ITSP interim goal but needs an extension to complete the goal.

5.2.D. COMPLETION OF THE CONTRACT

- (1) By regulation, the COP is considered complete, and a family's participation in the FSS Program is considered concluded, when ~~one of the following occurs~~ the FSS family has fulfilled all of its obligations under the contract of participation on or before the expiration of the contract term, including any extension thereof [24 CFR 984.303(g)].
 - ~~1. 30 percent of the monthly adjusted income of the FSS family equals or exceeds the published existing housing fair market rent for the size of the unit for which the FSS family qualifies based on Opportunity Home's occupancy standards. The COP will be considered completed and the family's participation in the FSS Program concluded on this basis even though the contract term, including any extension thereof, has not expired, and the family members who have individual training and services plans have not completed all the activities set forth in their plans.~~
- (2) Policies on verifying completion of the COP can be found in Section 6.1.C of this Action Plan.

5.2.F. TERMINATION OF THE CONTRACT

- (1) The COP may be terminated before the expiration of the contract term and any extension of the contract by the following [24 CFR 984.303(h)]:
 - (a) Mutual consent of the parties;
 - (b) Failure of the FSS family to meet its obligations under the COP without good cause, including in an HCV FSS Program the failure to comply with the contract requirements because the family has moved outside the jurisdiction of Opportunity Home;



(c) The family's withdrawal from the FSS Program;

(A) A family is considered withdrawn when:

1. A family submits a written request to withdraw; or
2. A family fails to respond within 10 business days upon receipt of a certified letter from Opportunity Home requesting the family contact FSS staff.

(d) Such other act as is deemed inconsistent with the purpose of the FSS Program; or

(e) Operation of law.

(2) The COP will be terminated before the expiration of the contract term, and any extension thereof, for any of the reasons listed in 5.2.F and in accordance with HUD regulations.

(3) Unless there is a good cause reason for the family failing to meet its obligations under the COP, Opportunity Home will follow the relevant policy specified in Section 5.1.D of this Action Plan.

(a) **Good cause**, for the purposes of the FSS Program, is also defined in Section 5.1.D.

(4) In addition, the COP is automatically terminated if the family's HCV or public housing assistance is terminated in accordance with HUD requirements [24 CFR 984.303(h)].

(5) There are two circumstances in which a COP may be terminated and the escrow can be disbursed instead of forfeited:

(a) If an FSS family in good standing moves outside the jurisdiction of the PHA for good cause, as determined by the PHA, and continuation of the COP after the move, or completion of the COP prior to the move, is not possible.

(b) If an FSS head of household in good standing becomes disabled and otherwise unable to complete the COP and there are no other adult household members who may take over as FSS head of household.



5.2.H. NULLIFICATION OF CONTRACT FOR UNAVAILABILITY OF SUPPORTIVE SERVICES [24 CFR 984.303(e)]

- (1) In addition to termination, the COP can also be ended ahead of time as a result of integral supportive services being unavailable.
 - (a) In the event a COP is ended due to integral supportive services being unavailable, the FSS head of household can still receive their accrued escrow disbursement.
- (2) However, this should only occur as a last resort in the event that:
 - (a) A social service agency fails to deliver the supportive services pledged under an FSS family member's individual training and services plan (ITSP), Opportunity Home must make a good faith effort to obtain these services from another agency.
 - (b) If Opportunity Home is unable to obtain the services from another agency, Opportunity Home must reassess the family member's needs and determine whether other available services would achieve the same purpose.
 - (c) If other available services do not achieve the same purpose, Opportunity Home shall determine whether the unavailable services are integral to the FSS family's advancement or progress toward self-sufficiency.
 - (d) If the unavailable services are not integral to the FSS family's advancement toward self-sufficiency, Opportunity Home must revise the ITSP, delete these services and modify the COP to remove any obligation on the part of the FSS family to accept the unavailable services.
 - (e) If the unavailable services *are* determined to be integral to the FSS family's advancement toward self-sufficiency (which may be the case if the affected family member is the head of the FSS family), Opportunity Home shall declare the COP null and void.
 - (f) Nullification of the COP on the basis of unavailability of supportive services shall not be grounds for termination of HCV assistance.

6.1.B. CALCULATING THE FSS CREDIT AMOUNT

- (1) For FSS families who are very low-income families, the FSS credit is the lesser of 30 percent of current monthly adjusted income less the family



rent, or the current family rent less the family rent at the time of the effective date of the contract of participation.

- (a) The family rent is obtained by disregarding any increases in earned income (as defined in 24 CFR 984.103) from the effective date of the contract of participation.
- (b) For FSS families who are considered low-income families but not very low-income families, the FSS credit is calculated in the same manner but cannot exceed the amount computed for ~~50~~ 80 percent of the median income [24 CFR 984.305(b)(1)].
- (2) FSS families who ~~are not low-income families~~ make 80% AMI or more are not entitled to any FSS credit [24 CFR 984.305(b)(2)].

6.1.C. DISBURSEMENT OF FSS ACCOUNT FUNDS

(1) Disbursement at Completion of Contract [24 CFR 984.305(c)(1)]

When the contract has been completed according to regulation, the amount in an FSS account in excess of any amount the FSS family owes to Opportunity Home will be paid to the head of the FSS family.

- (a) However, in order to receive the disbursement, the head of the FSS family must submit a certification (as defined in §984.103) to Opportunity Home at the time of contract completion that, to the best of his or her knowledge and belief, no member of the FSS family is a recipient of welfare assistance.

(2) Disbursement before Expiration of Contract Term

FSS account funds may also be disbursed before the end of the contract term.

- (a) If Opportunity Home determines that the FSS family has fulfilled its obligations under the contract of participation before the expiration of the contract term and the head of the FSS family submits a certification that, to the best of their knowledge, no member of the FSS family is a recipient of welfare assistance, the amount in the family's FSS account in excess of any amount the family owes to Opportunity Home will be paid to the head of the FSS family [24 CFR 984.305(c)(2)(i)].
- (b) In addition, Opportunity Home may at its sole option disburse FSS account funds before completion of the contract if the family needs a portion of the funds for purposes consistent with the contract of



participation and Opportunity Home determines that the FSS family has fulfilled certain interim goals established in the contract of participation. Such cases could include using the funds to assist the family in meeting expenses related to completion of higher education (e.g., college, graduate school) or job training, or to meet start-up expenses involved in creation of a small business [24 984.305(c)(2)(ii)].

- (i) Opportunity Home will disburse a portion of the FSS escrow account funds before completion of the COP if requested funds are needed in order to complete an interim goal or task within the COP and are not ongoing expenses; **or**
- (ii) The family has demonstrated that the need for one-time payment of otherwise ongoing expenses such as rent, utilities, telephone, cell phone, pager, car payments, car maintenance, insurance, or childcare is needed to complete an interim goal, a final goal, or a task related to such goals.

(3) Disbursement with Termination

There are three circumstances in which an FSS family may terminate with disbursement. Policies on termination with disbursement can be found in sections 5.2.F(5) and 5.2.H(1)(a) of this Action Plan

6.1.E. FORFEITURE OF FSS ACCOUNT FUNDS

- (1) Amounts in the FSS account will be forfeited when the contract of participation is terminated, or when the contract of participation is completed by the family (see Section 5.2.D. of this action plan) but the FSS family is receiving welfare assistance at the time of expiration of the term of the contract of participation, including any contract extension [24 CFR 984.305(f)(1)].

(2) Treatment of Forfeited FSS Account Funds

Treatment of forfeited FSS account funds do not differ depending on the type of FSS Program Opportunity Home operates.

- (a) For both public housing and HCV FSS Programs, FSS account funds forfeited by the FSS family will be credited to a joint PH/HCV FSS program fund. ~~Other Income and will become part of Unrestricted Net Assets.~~



- (b) Forfeited FSS account funds must be used for the benefit of FSS participants. Eligible activities include costs related to achieving obligations outlined in the Contract of Participation and training for FSS staff to increase service delivery. will be counted as other income in the determination of operating subsidy eligibility for the next budget year [24 CFR 984.305(f)(2)(i)].
- (c) Forfeited FSS Account Funds may not be used for general administrative costs of the FSS program.
- ~~(3) In the HCV program, forfeited FSS account funds will be treated as program receipts for payment of program expenses under Opportunity Home's budget for the program, and will be used in accordance with HUD requirements governing the use of program receipts [24 CFR 984.305(f)(2)(i)].~~

6.2.B. ACCOUNTING FOR FSS ACCOUNT FUNDS

- (1) When establishing FSS escrow accounts, Opportunity Home must deposit the FSS account funds of all families participating in Opportunity Home's FSS Program into a single depository account for each (public housing or HCV) program.
- (2) In addition, the funds held in this account must be invested in one or more of the HUD-approved investments [24 CFR 984.305].
- (3) The total of the combined FSS account funds will be supported in Opportunity Home accounting records by a subsidiary ledger showing the balance applicable to each FSS family.
 - (a) During the term of the contract of participation, Opportunity Home will credit the amount of the FSS credit(s) (see Section 6.1.B) to each family's FSS account on a monthly basis, periodically, but not less than annually, credits the amount of the FSS credit
 - ~~(b) Opportunity Home will credit the amount of the FSS credit(s) to each family's account on a quarterly basis.~~
- (4) **Proration of Investment Income [24 CFR 984.305(a)(2)(ii)]**
 - (a) Because the FSS account funds are to be invested, the investment income for those funds in the FSS account will also need to be credited to each family's account.



- (b) By regulation, these funds are to be prorated and credited to each family's FSS account based on the balance in each family's FSS account at the end of the period for which the investment income is credited.

- (c) Each year the full amount of the investment income for funds in the PH and HCV FSS account will be prorated and credited to each family's subsidiary line item after the deduction of unpaid rent and other amounts due under the PH or HCV-assisted lease.

(5) **Reduction of Amounts Due by FSS Family [24 CFR 984.305(a)(2)(iii)]**

If the FSS family has not paid the family contribution towards rent, or other amounts, if any, due under the public housing or HCV-assisted lease, the balance in the family's FSS account shall be reduced by that amount (as reported by the owner to Opportunity Home in the HCV FSS Program) before prorating the interest income.

- (a) If the FSS family has underreported income, no reduction will be made to the escrow account and the amount credited to the FSS account will be based on the income amounts originally reported by the FSS family.

- (i) If underreported income is discovered in the qualifying income certification used to enroll in FSS and establish the baseline rent, then escrow amounts must be recalculated utilizing the correct earned income amount.

FSS ACTION PLAN REVISIONS SUMMARY

August 17, 2022

- The purpose of the FSS Program is to coordinate housing assistance with public and private resources to enable assisted families to achieve economic self-sufficiency.
- On May 17, 2022, the U.S. Department of Housing and Urban Development (HUD) published the ***Family Self-Sufficiency (FSS) Final Rule***, which details substantial changes to the FSS program.
- HUD requires housing authorities to update their Action Plans in accordance with the final rule and implement the new rules by no later than ***November 14, 2022***.

FUNDING UPDATES

- Project Based Rental Assistance (PBRA) FSS is now funded by HUD and may operate under the existing FSS program. Escrow for PBRA participants must be maintained by the PBRA owner, who must sign a cooperative agreement with Opportunity Home San Antonio.
 - ***Opportunity Home is not moving forward with implementing FSS at our PBRAs at this time.***
- FSS Funding has been codified as follows:
 - Funding for 25 participants is for 1 Resident Services Coordinator (RSC), and 50 participants for each additional ratio

ENROLLMENT UPDATES

Currently, only the Head of Household can sign a Contract of Participation (COP).

- The updated policy will allow any person 17 years of age or older on the lease to sign a Contract of Participation (COP).
 - Only one person may sign a COP per family; and
 - The family must consent to whomever is contracting into FSS for their family.

Currently, Section 8(Y) HCV Homeownership, Moderate Rehabilitation (MOD Rehab), and Moderation Rehabilitation Single Room Occupancy (SRO) vouchers **are not eligible** for FSS.

- All voucher types will now be eligible for FSS, including Section 8(Y) HCV Homeownership, MOD rehab, and MOD rehab SRO.

Currently, the end date of Contract of Participation (COP) is five years after the contract effective date.

- The Contract of Participation (COP) end date will now be five years after the first interim or annual reexamination certification that occurs after the effective date of the COP.

Currently, there is flexibility on whether to request a new certification if the current was older than 120 days or staff had the option to use the old certification for the COP.

- Now, staff will only be able to use the most recent certification to contract, regardless of the certification "age." A participant may choose to delay enrollment until a new certification is completed to reflect lower income upon enrollment.

EXTENSIONS UPDATES

Currently, extensions may only be granted for “good cause” (reasons outside a person's control).

- Extensions may now be granted for the sake of completing a goal if the participant is actively involved in a goal activity at the time of extension request.

GRADUATION UPDATES

Currently, Housing Choice Voucher (HCV) participants automatically graduate when they reach 30%.

- HCV participants who reach 30% will continue in the program until they have met their Individual Training and Services Plan (ITSP) goals and request graduation. 30% is no longer a means of graduating.

Currently, participants must be TANF free for one year prior to graduation.

- Participants must now provide proof of being TANF free on ***their graduation date only***. There is no timeframe for maintaining a TANF free status.

- The rule regarding adding additional graduation requirements has been officially codified.
- PHAs may not require/mandate any additional graduation requirements. We have already repealed our practice of requiring everyone to have a financial empowerment goal and education goal. We must now repeal our mandate that participants complete a year of full time employment.

Currently, any kind of termination from the program results in forfeited escrow.

- Below are the select cases where participants may terminate and still receive their accumulated escrow:
 - If essential services are not available;
 - If the contracted participant becomes disabled/otherwise unable to complete their COP/ITSP and no other person on the lease can take over the COP; or
 - If a family ports outside jurisdiction to a location without FSS and cannot complete their ITSP prior to leaving.

QUESTIONS?

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022****BOARD OF COMMISSIONERS
Operations and Real Estate Committee****RESOLUTION 6269, APPROVING OF THE SINGLE FAMILY REFERRAL PREFERENCE FOR THE PUBLIC HOUSING PROGRAM**

DocuSigned by:



Ed Hinojosa, Jr.
President and CEO

DocuSigned by:



Joel Tabar
Interim Director of Public Housing

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6269, approving of the single family referral preference for the public housing program.

FINANCIAL IMPACT:

None at this time.

SUMMARY:

Opportunity Home San Antonio (Opportunity Home) aims to provide housing opportunities to individuals who are in need of housing by accepting referrals from designated social service agencies, such as Haven for Hope. In accordance with 24 CFR 960.206(b)(5), Opportunity Home has the authority to create a waitlist preference for single persons who are experiencing homelessness, displaced, elderly (age 62 or older), or who are persons with disabilities.

Opportunity Home is proposing to implement a new policy to allow individuals who qualify under any of the above criteria, who are referred by a designated social service agency, such as Haven for Hope, to be placed on the Public Housing (PH) waitlist with a preference for efficiency units. These individuals will retain the assigned preference throughout the waitlist, eligibility and offer process. This policy will be added to the Admissions and Continued Occupancy Policy (ACOP).

- I. **Single Family Referral (100 Points)** - Single persons certified by a designated social service agency as eligible based on the criteria below and referred to Opportunity Home under the terms and conditions of a Memorandum of Agreement with a certifying social service agency, such as Haven for Hope, to receive an available efficiency unit [24 CFR 960.206(b)(5)]. Individuals must meet at least one of the following criteria:
 - i. Elderly (age 62 or older)
 - ii. Displaced
 - iii. Homeless
 - iv. Persons with disabilities

STRATEGIC OUTCOME:

Opportunity Home residents have a sufficient supply of affordable housing options.

ATTACHMENT:

Resolution 6269

**Opportunity Home San Antonio
Resolution 6269**

RESOLUTION 6269, CONSIDERATION AND APPROVAL OF THE SINGLE FAMILY REFERRAL PREFERENCE FOR THE PUBLIC HOUSING PROGRAM

WHEREAS, Opportunity Home San Antonio (Opportunity Home) aims to provide housing opportunities to individuals who are in need of housing by accepting referrals from designated social service agencies, such as Haven for Hope; and

WHEREAS, in accordance with 24 CFR 960.206(b)(5), Opportunity Home has the authority to create a waitlist preference for single persons who are experiencing homelessness, displaced, elderly (age 62 or older), or who are persons with disabilities; and

WHEREAS, Opportunity Home is proposing to implement a new policy to allow individuals who qualify under any of the above criteria, who are referred by a designated social service agency, such as Haven for Hope, to be placed on the Public Housing (PH) waitlist with a preference for efficiency units; and

WHEREAS, this policy will be added to the Admissions and Continued Occupancy Policy (ACOP)

- I. Single Family Referral (100 Points)** - Single persons certified by a designated social service agency as eligible based on the criteria below and referred to Opportunity Home under the terms and conditions of a Memorandum of Agreement with a certifying social service agency, such as Haven for Hope, to receive an available efficiency unit [24 CFR 960.206(b)(5)]. Individuals must meet at least one of the following criteria:
- i. Elderly (age 62 or older)
 - ii. Displaced
 - iii. Homeless
 - iv. Persons with disabilities

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6269, approving of the single family referral preference for the public housing program.
- 2) Authorizes the President and CEO or designee to execute all necessary documents and extensions.

Passed and approved the 7th day of September 2022.

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

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTION 6270 AND RESOLUTION 22LVPFC-07-29, CONCERNING THE PROPOSED FINANCING OF UP TO \$35,000,000.00 OF THE COSTS OF THE ACQUISITION, REHABILITATION, AND EQUIPPING OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS; AN INCREASE IN THE INDUCEMENT AMOUNT, THE REASSIGNMENT OF CARRYFORWARD DESIGNATION TO OBTAIN VOLUME CAP ALLOCATION; AND OTHER MATTERS IN CONNECTION THEREWITH

DocuSigned by:



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Ed Hinojosa, Jr.
President and CEO

DocuSigned by:



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Timothy Alcott
Chief Legal and Real Estate Officer

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6270 and Resolution 22LVPFC-07-29, concerning the proposed financing of up to \$35,000,000.00 of the costs of the acquisition, rehabilitation, and equipping of the Rosemont at University Park Apartments; an increase in the inducement amount, the reassignment of carryforward designation to obtain volume cap allocation; and other matters in connection therewith.

FINANCIAL IMPACT:

Las Varas Public Facility Corporation, the issuer of the bonds, will earn an issuance fee of \$350,000.00 and an annual Asset management fee of \$24,000.00.

SUMMARY:

The Board has previously authorized the Las Varas Public Facility Corporation ("LVPFC") to pass a non-binding resolution inducing the proposed Rosemont at University Park Apartments 4% tax credit project (the "Project"). The Project, which was induced by LVPFC on May 4, 2022 (the "Inducement Date"), is a 240-unit multifamily project located at 102 Emerald Ash, San Antonio, Texas, 78221, and was induced for up to \$30,000,000.00 of volume cap. The project will be a rehabilitation of an existing facility and will have 15% of the units set aside for families at 30% of the area median income ("AMI"), with the remaining 85% of the units to be set aside for families at 60% AMI. Currently, Rosemont at University Park has zero units at 30% AMI and 240 units at 60% AMI. This action will extend the affordability by a minimum of 30 years, and also create deeper affordability requirements while maintaining 100% affordability.

All 4% tax credit projects must be financed in part with tax-exempt bonds. In order to issue tax-exempt bonds, the issuer must obtain a volume cap allocation from the Texas Bond Review Board. LVPFC has previously approved the reassignment of the carryforward designation that it received for the canceled St. John's Square project, which it can reassign to the Project in order to obtain a volume cap allocation now, rather than waiting in line. This will enable the Project to move forward, begin putting the financing together and negotiate the specific terms of the deal, which we will bring back to the Board for approval.

OPPORTUNITY HOME SAN ANTONIO

August 17, 2022

Since the Inducement Date, the estimated project costs have increased, and the inducement amount is now requested to be at \$35,000,000.00. The attached resolution approves the inducement.

STRATEGIC OUTCOME:

Opportunity Home residents have a sufficient supply of affordable housing options.

Opportunity Home residents live in quality affordable housing.

ATTACHMENTS:

Resolution 6270

Resolution 22LVPFC-07-29

Map

**San Antonio Housing Authority
Resolution 6270**

RESOLUTION 6270, CONCERNING THE PROPOSED FINANCING OF UP TO \$35,000,000.00 OF THE COSTS OF THE ACQUISITION, REHABILITATION, AND EQUIPPING OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS; AN INCREASE IN THE INDUCEMENT AMOUNT, THE REASSIGNMENT OF CARRYFORWARD DESIGNATION TO OBTAIN VOLUME CAP ALLOCATION; AND OTHER MATTERS IN CONNECTION THEREWITH

WHEREAS, one of Opportunity Home's strategic goals is to expand the supply of affordable housing; and

WHEREAS, a principal financing mechanism for new affordable housing is the 4% low income housing tax credit; and

WHEREAS, it is necessary to obtain volume cap allocations for tax-exempt bonds and applications for tax credits for the Rosemont at University Park Apartments project (the "Project"); and

WHEREAS, it is proposed that Las Varas Public Facility Corporation ("LVPFC") apply for volume cap allocation for the Project; and

WHEREAS, LVPFC and Opportunity Home previously passed nonbinding resolutions (the "Inducement Resolution") to induce the Project and authorize the applications needed to finance the Project and to negotiate the terms of such financing, which will be brought back to the Board for final consideration; and

WHEREAS, the User has requested an increase in the Inducement Resolution amount from \$30,000,000.00 to \$35,000,000.00 (the "Inducement Increase"); and

WHEREAS, LVPFC wishes to reassign carryforward designation that it received for the St. John's Apartment projects to the Project in order to receive volume cap allocation (the "Reassignment").

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6270 and Resolution 22LVPFC-07-29, concerning the proposed financing of up to \$35,000,000.00 of the costs of the acquisition, rehabilitation, and equipping of the Rosemont at University Park Apartments; an increase in the inducement amount, the reassignment of carryforward designation to obtain volume cap allocation; and other matters in connection therewith.
- 2) Authorizes the President and CEO or designee to execute all necessary documents and

extensions.

Passed and approved the 7th day of September 2022.

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

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

**CERTIFICATE FOR RESOLUTION
Resolution 22LVPFC-07-29**

The undersigned officer of the Las Varas Public Facility Corporation (the "Issuer") hereby certifies as follows:

1. In accordance with the bylaws of the Issuer, the Board of Directors of the Issuer (the "Board") held a meeting on September 7, 2022 (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 22LVPFC-07-29, CONCERNING THE PROPOSED FINANCING OF UP TO \$35,000,000.00 OF THE COSTS OF THE ACQUISITION, REHABILITATION, AND EQUIPPING OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS; AN INCREASE IN THE INDUCEMENT AMOUNT, THE REASSIGNMENT OF CARRYFORWARD DESIGNATION TO OBTAIN VOLUME CAP ALLOCATION; 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 Articles of Incorporation and the Bylaws of the Issuer.

SIGNED on this 7th day of September 2022.

**Ed Hinojosa, Jr.
Secretary/Treasurer**

Las Varas Public Facility Corporation
Resolution 22LVPFC-07-29

RESOLUTION 22LVPFC-07-29, CONCERNING THE PROPOSED FINANCING OF UP TO \$35,000,000.00 OF THE COSTS OF THE ACQUISITION, REHABILITATION, AND EQUIPPING OF THE ROSEMONT AT UNIVERSITY PARK APARTMENTS; AN INCREASE IN THE INDUCEMENT AMOUNT, THE REASSIGNMENT OF CARRYFORWARD DESIGNATION TO OBTAIN VOLUME CAP ALLOCATION; AND OTHER MATTERS IN CONNECTION THEREWITH

WHEREAS, Opportunity Home San Antonio (the “Housing Authority”), has, pursuant to the Texas Public Facility Corporations Act, Chapter 303, Texas Local Government Code, as amended (the “Act”), approved and created the Las Varas Public Facility Corporation, a nonstock, nonprofit public facility corporation (the “Issuer”); and

WHEREAS, the Issuer, on behalf of the Housing Authority, 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, prior to May 4, 2022 (the “Inducement Date”), Rosemont at University Park LP, a to-be-formed Texas limited partnership, which shall now be called Roers San Antonio Apartments Owner I Limited Partnership, a Texas limited partnership (the “User,” and, with respect to the name change of the User, the “Name Change”), filed a complete Application (as defined in the Federal Register Notice) (the “Application”), requesting that (i) the Issuer finance the acquisition, rehabilitation, and equipping of an existing 240-unit multifamily housing facility located at 102 Emerald Ash, San Antonio, Texas 78221 and known currently as the Rosemont at University Park Apartments (the “Project”); and (ii) the Issuer file a 2022, 2023, or subsequent year Allocation Application (defined hereafter) and/or any carryforward applications associated with such Allocation Applications to the Texas Bond Review Board (the “BRB”) as described herein; and

WHEREAS, the User has advised the Issuer that a contributing factor that would further induce the User to proceed with providing for the acquisition, equipping, and improvement of the Project would be a commitment and agreement by the Board of Directors (the “Board”) of the Issuer to issue housing revenue bonds pursuant to the Act (the “Bonds”) to finance and pay any Development Costs, as defined in the Act, for the Project; and

WHEREAS, on the Inducement Date, the Issuer adopted an inducement resolution (the “Inducement Resolution”) (i) constituting the Issuer’s commitment to issue Bonds, or other obligations, pursuant to the Act in an amount prescribed by the User not to exceed \$30,000,000.00 and to expend the proceeds thereof to pay Development Costs, including costs of acquisition, equipping, and improvement of the Project, funding a debt service or other reserve fund for the Project, and paying expenses and costs in connection with the issuance of the Bonds, including costs of obtaining credit enhancement, if any and (ii) authorizing Issuer to submit an “Application for Allocation of Private Activity Bonds” or an “Application for Carryforward for Private Activity Bonds” (the “Allocation Application”) to the

BRB; and

WHEREAS, the User has requested the not to exceed amount of the Inducement Resolution be increased to \$35,000,000.00 (the “Inducement Increase”); and

WHEREAS, in order to issue the Bonds in the manner contemplated, the Issuer must receive an allocation of the State of Texas volume cap pertaining to private activity bonds in order to satisfy the provisions of the Internal Revenue Code of 1986, as amended; and

WHEREAS, the Issuer filed with the BRB a “2020 Application for Carryforward for Private Activity Bonds” for its St. John’s Square Apartments project (“St. John’s” and the “Prior Project”) (the “Carryforward Applications”); and

WHEREAS, pursuant to the Carryforward Applications, the Issuer received the Carryforward Designation Certificate – Docket Number 20CF-011 (the “St. John’s Carryforward”); and

WHEREAS, the Prior Project will not be completed, so the Issuer will reassign a portion of the St. John’s Carryforward (the “Reassignment”) in accordance with Texas Government Code Section 1372.074 in order to allocate volume cap to the Project; and

WHEREAS, the members of the Board and their respective offices are as

follows:

<u>Name of Director/Officer</u>	<u>Position</u>
Dr. Ana M. “Cha” Guzmán	Chair and Director
Olga Kauffman	Vice Chair and Director
Ignacio Perez	Director
Dalia Flores Contreras	Director
Gilbert Casillas	Director
Gabriel “Gabe” Lopez	Director
Loren Dantzler	Director
Ed Hinojosa, Jr.	Secretary/Treasurer
Diana Fiedler	Asst. Secretary/Treasurer
Timothy E. Alcott	Asst. Secretary/Treasurer
Muriel Rhoder	Asst. Secretary/Treasurer
Brandee Perez	Asst. Secretary/Treasurer
Michael Reyes	Asst. Secretary/Treasurer
Richard Milk	Asst. Secretary/Treasurer

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 User may construct the Project.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF THE LAS VARAS

PUBLIC FACILITY CORPORATION THAT:

Section 1. The provisions of the Inducement Resolution and the Name Change are hereby ratified, authorized, and confirmed in all respect;

Section 2. The Reassignment and all actions necessary or desirable in connection therewith are hereby authorized and approved;

Section 3. The Inducement Increase is hereby consented to and acknowledged by the Issuer;

Section 4. The Board authorizes the President, Vice President, Secretary/Treasurer or any Assistant Secretary/Treasurer of the Board to execute any documents or certificates necessary or desirable in connection with any of the transactions described herein, and each of them are authorized to negotiate and approve such changes in the terms of such documents as such officers shall deem necessary or appropriate upon the advice of counsel to the Issuer, and approval of the terms of each such instrument by such officers shall be conclusively evidenced by the execution and delivery of such documents.

Section 5. 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 6. 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 7. 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.

Section 8. This Resolution shall be construed and enforced in accordance with the laws of the State of Texas and the United States of America.

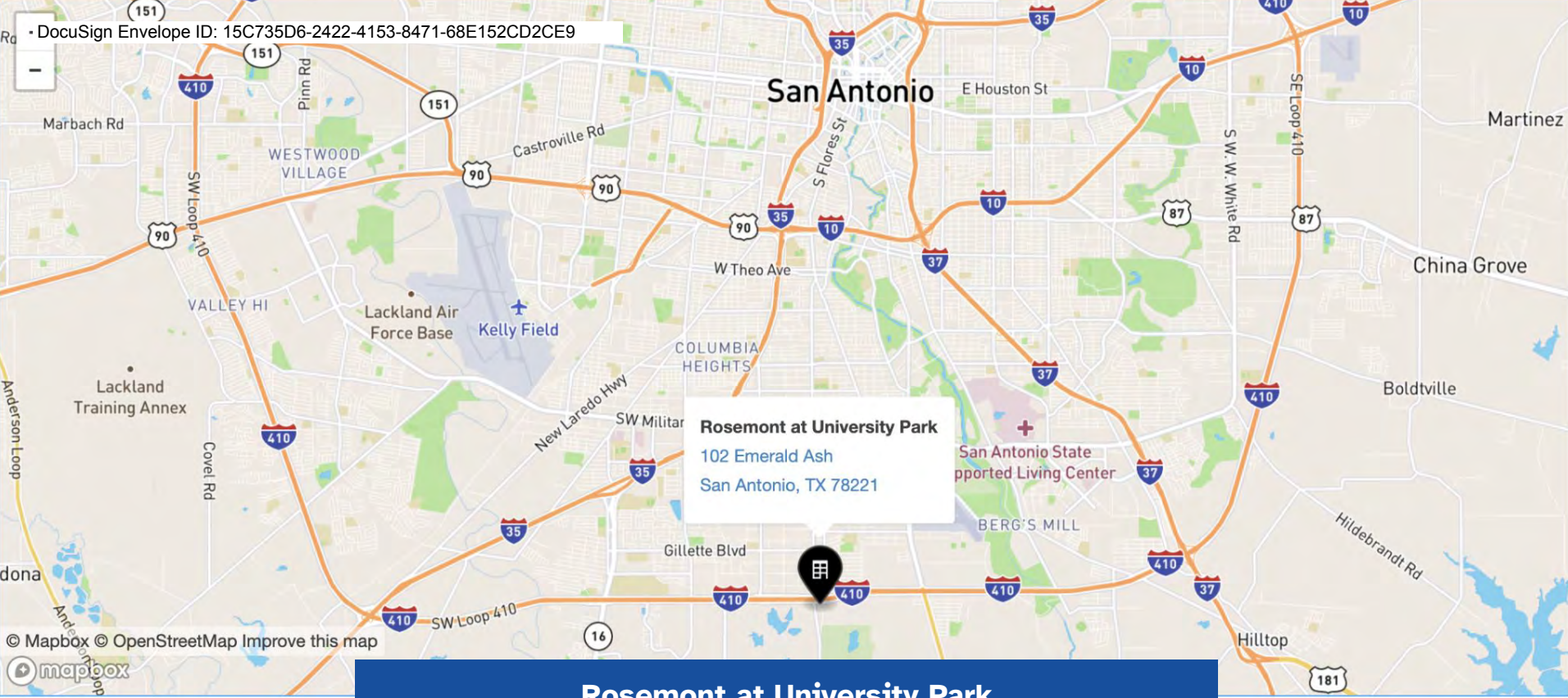
Section 9. This Resolution shall be in force and effect from and after its passage.

Passed and approved the 7th day of September 2022.

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

Attested and approved as to form:

Ed Hinojosa, Jr.
Secretary/Treasurer




Rosemont at University Park
102 Emerald Ash

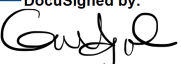



OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTION 6271, AUTHORIZING THE AWARD OF A CONTRACT FOR PROPERTY MANAGEMENT SERVICES FOR SNOWDEN SENIOR APARTMENTS TO HOMESPRING RESIDENTIAL SERVICES; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO THREE ADDITIONAL ONE-YEAR TERMS

DocuSigned by:

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

DocuSigned by:

 23FA60FCE3934A7...
George Ayala
Director of Procurement

DocuSigned by:

 7BED7A206333420...
Lorraine Robles
Director of Development Services and Neighborhood Revitalization

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6271, authorizing the award of a contract for Property Management Services for Snowden Senior Apartments to HomeSpring Residential Services; for a period of one year with the option to renew up to three additional one- year terms.

FINANCIAL IMPACT:

The fees to be paid for property management services will not exceed 4 percent of the total monthly income. These fees will be paid from the operating budget.

SUMMARY:

Snowden Senior Apartments located at 7223 Snowden Road, San Antonio, Texas, is planned as a 135-unit new construction apartment complex for seniors 62 years of age and older and is owned by the Housing Facility Corporation (HFC). The apartments are proposed to contain 14 units at 30% of area median income and below, 47 units at 50% of area median income and below, and 74 units at 60% of area median income and below. The development will provide a mix of one- and two-bedroom units with appropriate design considerations for senior living households and is anticipated to be 100% affordable with 40% (54) of the units subsidized by Project-based local, non-traditional rental subsidy programs.

The HFC requires the services of a property management company to provide all aspects of leasing, marketing, operation, maintenance, loan and regulatory compliance, financial accounting, and financial management and reporting for the Snowden Senior Apartments. The ultimate goal of the HFC outsourcing the property management of this apartment complex is to better ensure the financial performance of the asset, resulting in an increase in its market value within the marketplace.

PROCUREMENT PROCESS:

On July 7, 2022, HFC issued a "Request For Proposals" (RFP) #2206-5298 for Property Management Services for Snowden apartments, which closed on July 27, 2022. The RFP was

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

published on the Opportunity Home E-Procurement Website, the Hart Beat, NAHRO E-Procurement website, and directly solicited to 141 vendors. A total of three responses were received in response to this solicitation: Capstone Real Estate Services, Inc, HomeSpring Residential Services, and Reign Asset Management, LLC (WBE). All proposals were evaluated based on experience in affordable, mixed-income and conventional housing management, staffing and business systems, capacity/financial viability, fee proposal, and strength of the vendor's Section 3 and SWMBE Utilization Plans. Based on the above, we are recommending a contract award to HomeSpring Residential Services, they are the highest rated qualified proposer.

COMPANY PROFILE:

HomeSpring Residential Services was founded in 1982 and is headquartered in San Antonio, Texas. They specialize in the development and management of multifamily affordable housing serving populations of varied socio-economic backgrounds, including those on fixed incomes, seniors, persons with disabilities and households earning less than the area median income, and also traditional conventional communities. They are familiar with the requirements of Texas State Affordable Housing Corporation (TSAHC) and Texas Department of Housing and Community Affairs (TDHCA) and have managed properties directly for HUD and HUD/Federal Housing Administration (FHA) insured properties. HomeSpring employs a special inspection team to oversee all TDHCA Uniform Physical Condition Standards (UPCS), HUD Real Estate Assessment Center (REAC) or physical inspections. Their accounting systems and management policies are geared to ensure they are in compliance with any and all community regulatory agreements, lenders operating agreements, and local HUD procedures.

Their services for Seniors include, but are not limited to, educational services, skills and development, health and nutrition, neighborhood leadership, and fun activities. They also provide an array of resident services: computer training, GED classes, nutrition classes, swimming lessons, budgeting workshops, credit counseling, first aid and CPR classes, and transportation through the Department of Initiatives.

They have worked with Housing Authorities to include the Housing Authority of Bexar County, Housing Authority of Eagle Pass, City of Converse, Corpus Christi Housing Authority, and Midland County Housing Authority. Their client list includes, but is not limited to, Chaminade Apartments, Eagle Ridge, Fredericksburg Place, Hilltop Oaks, Kerrville Plaza, St. Mary's University, Vera Development, and Vista Meadows.

PRIOR OPPORTUNITY HOME AWARDS:

HomeSpring Residential Services have collaborated to build and manage the following properties for Opportunity Home: Elan Gardens, Majestic Ranch, Mira Vista, and Bristol at Summerset (under construction).

CONTRACT OVERSIGHT:

Contract oversight will be provided by Lorraine Robles, Director of Development Services and Neighborhood Revitalization, who will monitor the vendor's adherence to contract requirements and performance.

STRATEGIC OUTCOME:

OPPORTUNITY HOME SAN ANTONIO

August 17, 2022

Opportunity Home residents live in quality affordable housing.

ATTACHMENTS:

Resolution 6271

Scoring Matrix

Advertisement List

**Opportunity Home San Antonio
Resolution 6271**

RESOLUTION 6271, AUTHORIZING THE AWARD OF A CONTRACT FOR PROPERTY MANAGEMENT SERVICES FOR SNOWDEN SENIOR APARTMENTS TO HOMESPRING RESIDENTIAL SERVICES; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO THREE ADDITIONAL ONE-YEAR TERMS

WHEREAS, the Housing Facility Corporation (HFC) requires the services of a property management company to provide all aspects of leasing, marketing, operation, maintenance, loan and regulatory compliance, financial accounting, and financial management and reporting for the Snowden Senior Apartments; and

WHEREAS, on July 7, 2022, the HFC issued a "Request For Proposals" (RFP) #2206-5298 for Property Management Services for Snowden apartments, which closed on July 27, 2022; and

WHEREAS, three responses were received in response to the solicitation; and

WHEREAS, staff are recommending a contract award to HomeSpring Residential Services, they are the highest rated qualified proposer.

WHEREAS, the fees to be paid for property management services will not exceed 4 percent of the total monthly income. These fees will be paid from the operating budget.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6271, authorizing the award of a contract for Property Management Services for Snowden Senior Apartments to HomeSpring Residential Services; for a period of one year with the option to renew up to three 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 7th day of September 2022.

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

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO



A COMMUNITY OF POSSIBILITIES

**RFP# 2205-5298 Property Management Services for Snowden Apartments
Scoring Summary**

Supplier	Total / 100 pts	Experience in / 30 pts	Staffing and / 20 pts	Capacity/Financial / 10 pts	Strength of the / 5 pts	Strength of the / 5 pts	Fee Proposal / 30 pts
HomeSpring Residential Services	89.79	28	18.67	7.333	4	3.667	28.13 (4%)
Capstone Real Estate Services, Inc.	74	22	14.67	4.667	1.333	1.333	30 (3.75%)
Reign Asset Management LLC	45.83	8	5.333	2.667	3.333	4	22.5 (5%)



RFP# 2206-5298 Property Management Services for Snowden Apartments

Advertisement List

#	Email Address or Domain Name	Date Invited
1	\@alamohr.com	Jul 7th 2022, 12:31 PM CDT
2	\@arbooneconstruction.com	Jul 7th 2022, 12:31 PM CDT
3	\@BWAY.NET	Jul 7th 2022, 12:31 PM CDT
4	\@CBIZ.com	Jul 7th 2022, 12:31 PM CDT
5	\@christopherdking.com	Jul 7th 2022, 12:31 PM CDT
6	\@collaborate-llc.com	Jul 7th 2022, 12:31 PM CDT
7	\@colliers.com	Jul 7th 2022, 12:31 PM CDT
8	\@cquvator.com	Jul 7th 2022, 12:31 PM CDT
9	\@endeavors.org	Jul 7th 2022, 12:31 PM CDT
10	\@ess.net	Jul 7th 2022, 12:31 PM CDT
11	\@ghd.com	Jul 7th 2022, 12:31 PM CDT
12	\@gmail.com	Jul 7th 2022, 12:31 PM CDT
13	\@liferebuilders.org	Jul 7th 2022, 12:31 PM CDT
14	\@louisvilleky.gov	Jul 7th 2022, 12:31 PM CDT
15	\@melanpm.com	Jul 7th 2022, 12:31 PM CDT
16	\@mstrategicpartners.com	Jul 7th 2022, 12:31 PM CDT
17	\@nstonecorp.com	Jul 7th 2022, 12:31 PM CDT
18	\@outlook.com	Jul 7th 2022, 12:31 PM CDT
19	\@owens-services.com	Jul 7th 2022, 12:31 PM CDT
20	\@pinnaclegroup.biz	Jul 7th 2022, 12:31 PM CDT
21	\@POSOLUTIONS.NET	Jul 7th 2022, 12:31 PM CDT
22	\@prodigy.net	Jul 7th 2022, 12:31 PM CDT
23	\@prote-us.com	Jul 7th 2022, 12:31 PM CDT
24	\@reefpointsadvisors.com	Jul 7th 2022, 12:31 PM CDT
25	\@saachiindigenousnation.com	Jul 7th 2022, 12:31 PM CDT
26	\@scsp-usa.com	Jul 7th 2022, 12:31 PM CDT
27	\@spsolutionsusa.com	Jul 7th 2022, 12:31 PM CDT
28	\@straffordgroup.com	Jul 7th 2022, 12:31 PM CDT
29	\@tcm-llc.com	Jul 7th 2022, 12:31 PM CDT
30	\@teamallied.com	Jul 7th 2022, 12:31 PM CDT
31	\@theretailconnection.net	Jul 7th 2022, 12:31 PM CDT
32	\@therushlowgroup.com	Jul 7th 2022, 12:31 PM CDT
33	\@tklaw.com	Jul 7th 2022, 12:31 PM CDT
34	\@triadcrs.com	Jul 7th 2022, 12:31 PM CDT
35	\@venturelynkfinancial.com	Jul 7th 2022, 12:31 PM CDT
36	\@vrmco.com	Jul 7th 2022, 12:31 PM CDT
37	\@yahoo.com	Jul 7th 2022, 12:31 PM CDT

38	adeoliveira@goodwillsa.org	Jul 8th 2022, 2:13 PM CDT
39	admin@hcadesa.org	Jul 8th 2022, 2:13 PM CDT
40	admin@saachiindigenousnation.com	Jul 7th 2022, 12:31 PM CDT
41	admin@sawomenschamber.org	Jul 8th 2022, 2:13 PM CDT
42	al@southsa.org	Jul 8th 2022, 2:13 PM CDT
43	alicia@liferebuilders.org	Jul 7th 2022, 12:31 PM CDT
44	angela@arbooneconstruction.com	Jul 7th 2022, 12:31 PM CDT
45	anne@acectx.org	Jul 8th 2022, 2:13 PM CDT
46	archie.smith@louisvilleky.gov	Jul 7th 2022, 12:31 PM CDT
47	Ave2aveinv@gmail.com	Jul 7th 2022, 12:31 PM CDT
48	Bernard.chester@prodigy.net	Jul 7th 2022, 12:31 PM CDT
49	bertram_jenkins@yahoo.com	Jul 7th 2022, 12:31 PM CDT
50	beth.ritchie@scsp-usa.com	Jul 7th 2022, 12:31 PM CDT
51	bexarpepp@sbcglobal.net	Jul 8th 2022, 2:13 PM CDT
52	bids@wbea-texas.org	Jul 8th 2022, 2:13 PM CDT
53	bkelley@melanpm.com	Jul 7th 2022, 12:31 PM CDT
54	blackchamber@aol.com	Jul 8th 2022, 2:13 PM CDT
55	briannad@sahcc.org	Jul 8th 2022, 2:13 PM CDT
56	bstokes@venturelynkfinancial.com	Jul 7th 2022, 12:31 PM CDT
57	carlos.pina@prote-us.com	Jul 7th 2022, 12:31 PM CDT
58	cfs.supplierdiversity@colliers.com	Jul 7th 2022, 12:31 PM CDT
59	cjohnson@sctrca.org	Jul 8th 2022, 2:13 PM CDT
60	cking@christopherdking.com	Jul 7th 2022, 12:31 PM CDT
61	constructionadmin@smartlocating.com	Jul 8th 2022, 2:13 PM CDT
62	contact@cquvator.com	Jul 7th 2022, 12:31 PM CDT
63	content@constructconnect.com	Jul 8th 2022, 2:13 PM CDT
64	courtney3000@gmail.com	Jul 7th 2022, 12:31 PM CDT
65	dahernandez@endeavors.org	Jul 7th 2022, 12:31 PM CDT
66	Daniel.Schechter@ghd.com	Jul 7th 2022, 12:31 PM CDT
67	Darren_Friesenhahn@homedepot.com	Jul 8th 2022, 2:13 PM CDT
68	dave@hcadesa.org	Jul 8th 2022, 2:13 PM CDT
69	DGiammarino@constructionjournal.com	Jul 8th 2022, 2:13 PM CDT
70	dkaczynski@collaborate-llc.com	Jul 7th 2022, 12:31 PM CDT
71	don@ess.net	Jul 7th 2022, 12:31 PM CDT
72	dpetersen@sachamber.org	Jul 8th 2022, 2:13 PM CDT
73	drettig@triadcrs.com	Jul 7th 2022, 12:31 PM CDT
74	Dwain.Little@CBIZ.com	Jul 7th 2022, 12:31 PM CDT
75	elva.adams@wellsfargo.com	Jul 8th 2022, 2:13 PM CDT
76	Exclusively.Uniqueinfo@gmail.com	Jul 7th 2022, 12:31 PM CDT
77	exdir@hcadesa.org	Jul 8th 2022, 2:13 PM CDT
78	faircontractingcoalitioninfo@gmail.com	Jul 8th 2022, 2:13 PM CDT
79	farooq@straffordgroup.com	Jul 7th 2022, 12:31 PM CDT
80	gabrielle@smsdc.org	Jul 8th 2022, 2:13 PM CDT
81	gingermiller@hoganre.com	Jul 7th 2022, 4:41 PM CDT
82	hector@hegarciacpa.com	Jul 8th 2022, 2:13 PM CDT
83	Heidi@phcc-sanantonio.org	Jul 8th 2022, 2:13 PM CDT
84	iamtiffanydent@gmail.com	Jul 7th 2022, 12:31 PM CDT

85	info@aiasa.org	Jul 8th 2022, 2:13 PM CDT
86	info@alamocitychamber.org	Jul 8th 2022, 2:13 PM CDT
87	info@westsachamber.org	Jul 8th 2022, 2:13 PM CDT
88	ITA@BWAY.NET	Jul 7th 2022, 12:31 PM CDT
89	Jacqueline.Jackson@utsa.edu	Jul 8th 2022, 2:13 PM CDT
90	jeannette@virtualbx.com	Jul 8th 2022, 2:13 PM CDT
91	jennifer.mort@utsa.edu	Jul 8th 2022, 2:13 PM CDT
92	jennifer.moyer@capstonemanagement.com	Jul 8th 2022, 9:27 AM CDT
93	jennifer@asasanantonio.org	Jul 8th 2022, 2:13 PM CDT
94	jennifer@tspe.org	Jul 8th 2022, 2:13 PM CDT
95	jennytn888@gmail.com	Jul 7th 2022, 12:31 PM CDT
96	jhoward@iecsanantonio.com	Jul 8th 2022, 2:13 PM CDT
97	jim@alamobonds.com	Jul 8th 2022, 2:13 PM CDT
98	julie@westsachamber.org	Jul 8th 2022, 2:13 PM CDT
99	kenn.webb@tklaw.com	Jul 7th 2022, 12:31 PM CDT
100	kimr@avacpa.com	Jul 8th 2022, 2:13 PM CDT
101	Kindlybuildingdreams@gmail.com	Jul 7th 2022, 12:31 PM CDT
102	ksutterfield@sabuilders.com	Jul 8th 2022, 2:13 PM CDT
103	ldukes@nstonecorp.com	Jul 7th 2022, 12:31 PM CDT
104	Madeline@masarchitecture.com	Jul 8th 2022, 2:13 PM CDT
105	mariyaf@sahcc.org	Jul 8th 2022, 2:13 PM CDT
106	martham@recsanantonio.com	Jul 8th 2022, 2:13 PM CDT
107	matt.lutz@capstonemanagement.com	Jul 8th 2022, 2:13 PM CDT
108	mca-smacna@mca-smacna.org	Jul 8th 2022, 2:13 PM CDT
109	mcronin@owens-services.com	Jul 7th 2022, 12:31 PM CDT
110	mg.assoc.mgmt@gmail.com	Jul 8th 2022, 2:13 PM CDT
111	mgibson@reefpointsadvisors.com	Jul 7th 2022, 12:31 PM CDT
112	mginsbach@spsolutionsusa.com	Jul 7th 2022, 12:31 PM CDT
113	nawicerin@gmail.com	Jul 8th 2022, 2:13 PM CDT
114	nawicsatx@gmail.com	Jul 8th 2022, 2:13 PM CDT
115	onemdinc@gmail.com	Jul 7th 2022, 12:31 PM CDT
116	orestes.hubbard@utsa.edu	Jul 8th 2022, 2:13 PM CDT
117	Pjohnsonwfg@gmail.com	Jul 7th 2022, 12:31 PM CDT
118	pmdirector@teamallied.com	Jul 7th 2022, 12:31 PM CDT
119	Propertiesenhanced@gmail.com	Jul 7th 2022, 12:31 PM CDT
120	ptac@utsa.edu	Jul 8th 2022, 2:13 PM CDT
121	rbaldwin@franklinmgt.net	Jul 7th 2022, 4:41 PM CDT
122	richard.morris@mstrategicpartners.com	Jul 7th 2022, 12:31 PM CDT
123	robertolivo@tibh.org	Jul 8th 2022, 2:13 PM CDT
124	rvasquez@iecsanantonio.com	Jul 8th 2022, 2:13 PM CDT
125	sanantonioagc@gmail.com	Jul 8th 2022, 2:13 PM CDT
126	sandy@alamohr.com	Jul 7th 2022, 12:31 PM CDT
127	sankofaedg@gmail.com	Jul 7th 2022, 12:31 PM CDT
128	SHAN@POSOLUTIONS.NET	Jul 7th 2022, 12:31 PM CDT
129	shhomesolutions@gmail.com	Jul 7th 2022, 12:31 PM CDT
130	shussain@goodwill.sa.org	Jul 8th 2022, 2:13 PM CDT
131	smsdc@smsdc.org	Jul 8th 2022, 2:13 PM CDT

132	sriebe@pinnaclegroup.biz	Jul 7th 2022, 12:31 PM CDT
133	srushlow@therushlowgroup.com	Jul 7th 2022, 12:31 PM CDT
134	Suzanne@sabor.com	Jul 8th 2022, 2:13 PM CDT
135	Tamara@abcsouthtexas.org	Jul 8th 2022, 2:13 PM CDT
136	tfilley@theretailconnection.net	Jul 7th 2022, 12:31 PM CDT
137	tfletcher@vrmco.com	Jul 7th 2022, 12:31 PM CDT
138	thesamca@gmail.com	Jul 8th 2022, 2:13 PM CDT
139	troi@tcm-llc.com	Jul 7th 2022, 12:31 PM CDT
140	wstarks@outlook.com	Jul 7th 2022, 12:31 PM CDT
141	xeniaonemarketplace@gmail.com	Jul 7th 2022, 12:31 PM CDT

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTION 6272, APPROVING THE INTERIM ADMINISTRATIVE PLAN UPDATES

DocuSigned by:

 07D40F73013F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 0480821042EB4B6...
Stephanie Rodriguez
Director of Assisted Housing Programs

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6272, approving the Interim Administrative Plan Updates.

FINANCIAL IMPACT:

None at this time.

SUMMARY:

Opportunity Home San Antonio (Opportunity Home) aims to address inefficiencies in lease-up processes by making changes to policies that will allow families greater opportunity for a quick and efficient lease-up.

In accordance with 24 CFR 982.303, Opportunity Home has the authority to establish an initial voucher term of at least 60 days. Opportunity Home is proposing to implement this new policy so families will no longer be required to request a voucher extension from the organization before the current 60-day initial voucher term expires. As private market rents have increased and families are facing new barriers to quickly leasing up, this change will allow additional time to search without having to coordinate a voucher extension from Opportunity Home. This change will also alleviate the staff burden of processing voucher extensions as frequently.

The revised voucher term policy below will be added to the Administrative Plan.

I. VOUCHER TERM

- A.** The initial voucher term will be at least 60 calendar days.

In accordance with the following Moving to Work (MTW) Activities that establish special voucher programs, Opportunity Home is proposing to allow for more flexible use of vouchers based on community and partner agency needs.

- FY2020-1: College & University Homeless Assistance Programs
- FY2011-9: Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services.

The revised special programs policies below will be added to the Administrative Plan.

II. MOVE ON PROGRAM

OPPORTUNITY HOME SAN ANTONIO

August 17, 2022

- A.** The Move On Program provides tenant-based vouchers based on community need for families to transition into subsidized housing via the Housing Choice Voucher. The program is designed to serve those who previously experienced chronic homelessness, have been successfully served through supportive housing and will benefit from ongoing housing subsidy to prevent a return to homelessness. Current partner is the South Alamo Regional Alliance for the Homeless (SARAH) [see MTW Activity FY 2011-9 and MTW Activity FY 2019-2020 Amendment].

III. SET ASIDE HOMELESS VOUCHER PROGRAM

- A.** The Set Aside Homeless Voucher Program (SHVP) provides rental voucher assistance based on community need to homeless individuals through a collaborative referral process with case management and supportive services provided by the Center for Health Care Services (CHCS) and San Antonio Metropolitan Ministries (SAMB) [see MTW Activity FY 2011-9].

IV. COLLEGE & UNIVERSITY HOMELESS ASSISTANCE PROGRAMS

- A.** The College & University Homeless Assistance Programs are set-aside voucher programs for homeless students attending any of the Alamo Community Colleges.

STRATEGIC OUTCOME:

Opportunity Home residents have a sufficient supply of affordable housing options.

ATTACHMENT:

Resolution 6272

**Opportunity Home San Antonio
Resolution 6272**

RESOLUTION 6272, APPROVING THE INTERIM ADMINISTRATIVE PLAN UPDATES

WHEREAS, Opportunity Home San Antonio (Opportunity Home) aims to address inefficiencies in lease-up processes by making changes to policies that will allow families greater opportunity for a quick and efficient lease-up; and

WHEREAS, in accordance with 24 CFR 982.303, Opportunity Home has the authority to establish an initial voucher term of at least 60 days and in accordance with Moving to Work (MTW) Activities that establish special voucher programs; and

WHEREAS, Opportunity Home is proposing to implement new policy so families will no longer be required to request a voucher extension from the organization before the current 60-day initial voucher term expires, and is proposing to allow for more flexible use of vouchers based on community and partner agency needs; and

WHEREAS, these policies will be added to the Administrative Plan

I. MOVE ON PROGRAM

- A. The Move On Program provides tenant-based vouchers based on community need for families to transition into subsidized housing via the Housing Choice Voucher. The program is designed to serve those who previously experienced chronic homelessness, have been successfully served through supportive housing and will benefit from ongoing housing subsidy to prevent a return to homelessness. Current partner is the South Alamo Regional Alliance for the Homeless (SARAH) [see MTW Activity FY 2011-9 and MTW Activity FY 2019-2020 Amendment].

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III. COLLEGE & UNIVERSITY HOMELESS ASSISTANCE PROGRAMS

- A. The College & University Homeless Assistance Programs are set-aside voucher programs for homeless students attending any of the Alamo Community Colleges.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6272, approving the Interim Administrative Plan Updates.

- 2) Authorizes the President and CEO or designee to execute all necessary documents and extensions.

Passed and approved the 7th day of September 2022.

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

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

UPDATE ON RESIDENTS FEEL SAFE OUTCOME

Operations and Real Estate Committee

August 17, 2022

TODAY

1. Strategic Plan
Context
2. Summary Results
3. Survey
Administration
4. Threat
Assessments

WHY DO WE ASK RESIDENTS WHETHER THEY FEEL SAFE?

Strategic Plan Priority Outcomes

Percentage of residents who said they...

... were satisfied or very satisfied with their **housing quality**

65.4%

... felt mostly safe or always **safe**

72.5%

... were satisfied or very satisfied with their **utilities**

80.0%

... were satisfied or very satisfied with their **housing options**

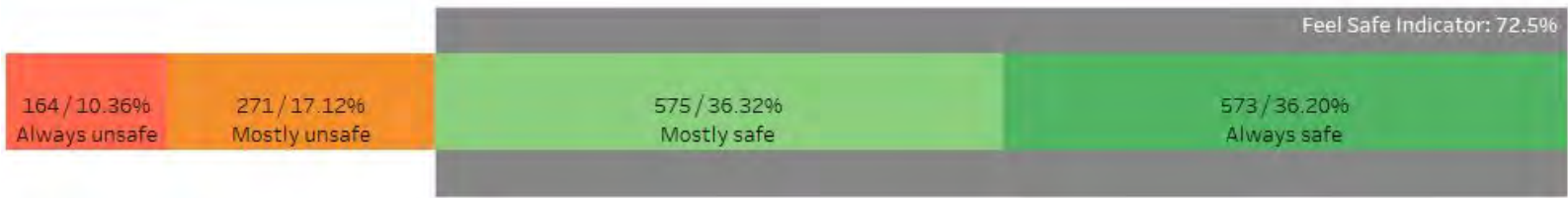
70.9%

SURVEY RESULTS



Overall, 73% of residents feel safe

“In the last 30 days, how safe did you feel?”



Of the 1,583 surveys respondents who answered this question, 73% responded that they felt mostly safe or always safe. (20 survey respondents did not answer this question and are excluded from the calculations.)



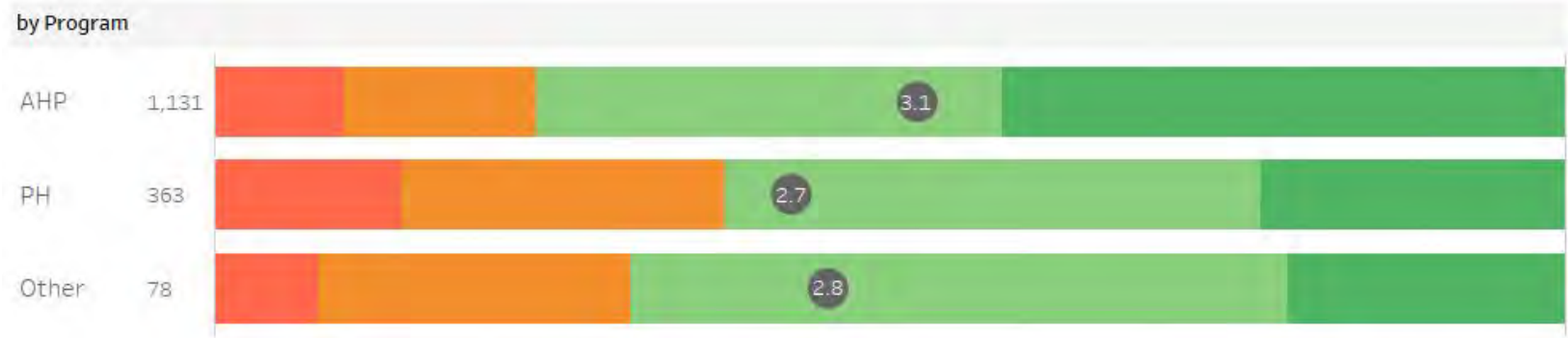
Comparison to baseline



Comparison by Program

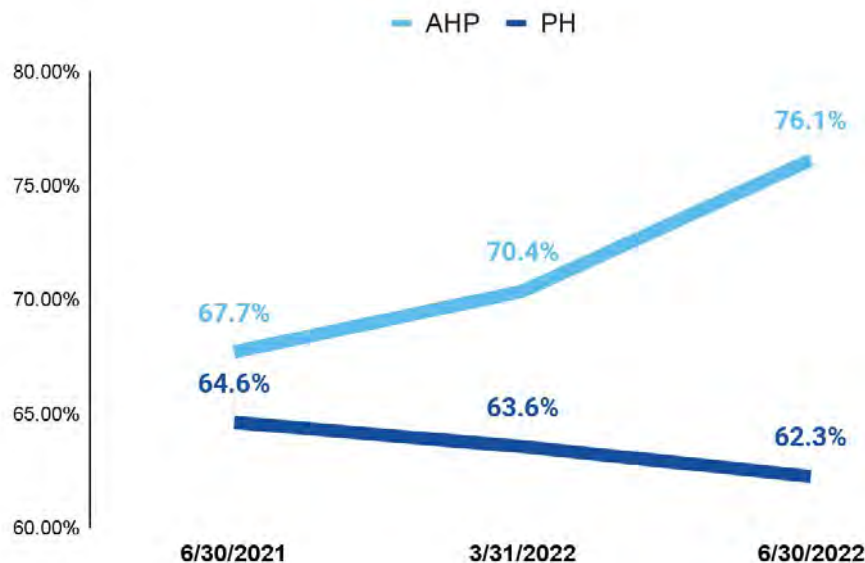
Variation between groups is very small.

As a group, voucher households feel more safe than public housing households or other households.



1,572 surveys respondents who answered the question “Please select the option below that best applies to you.” Other category includes respondents who identified as a market renter, beacon residents, or other.

Trends by Program



Variation between groups.

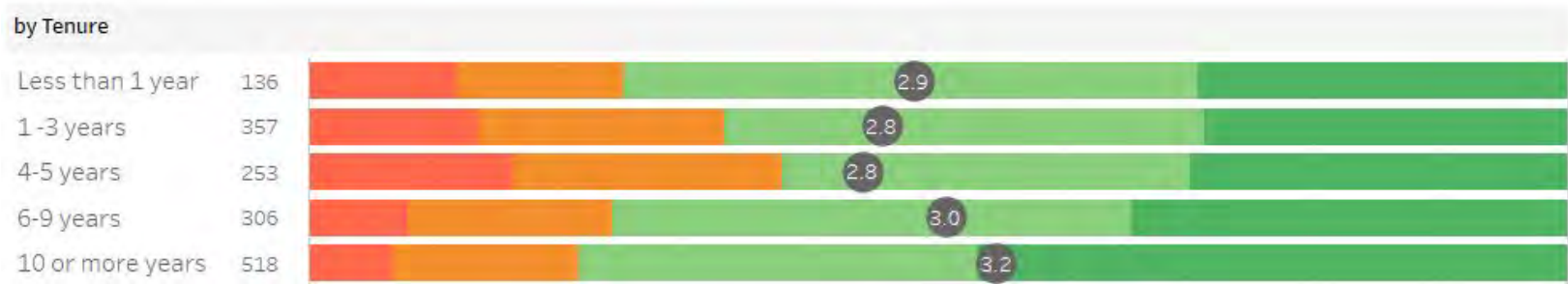
Voucher households feel safer today than a year ago.

Public housing residents feel less safe today than a year ago.

Comparison by Tenure

Variation between groups.

Longer tenured residents feel most safe.

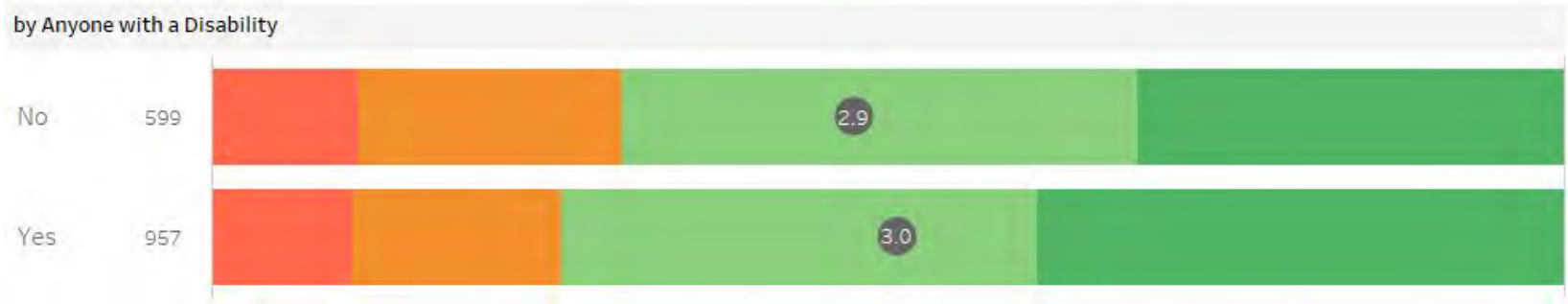


1,570 survey respondents (excludes “No response” (n=13)) when asked: “Thinking about your response from Question 1, how long has this been true?”

Comparison by Disability

Variation between groups is very small.

Residents with anyone with a disability feel safer than residents without anyone with a disability.



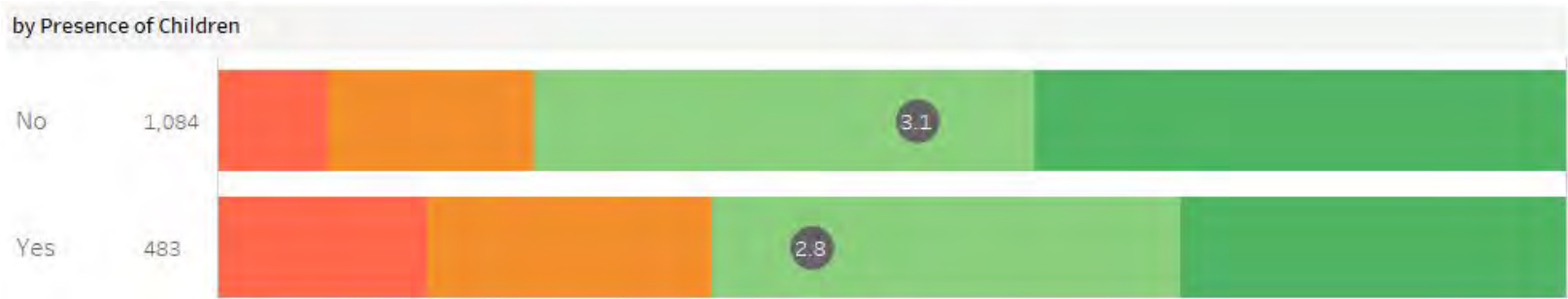
1,556 survey respondents (excludes “No response” (n=27)) when asked: “Do you or anyone in your household have a documented disability?”



Comparison by Children

Variation between groups.

Families with children feel less safe than families without children



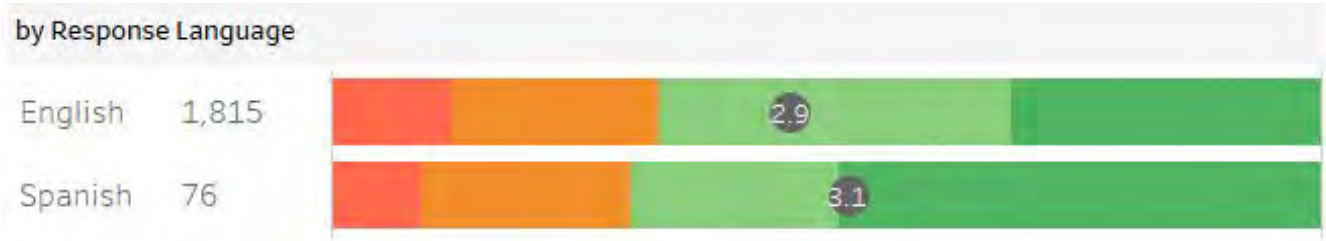
1,567 survey respondents (excludes “No response” (n=16)) when asked: “Are there children (ages 17 and below) in your household?”

Comparison by Response Language (Q3)

Variation between groups.

Those who responded in Spanish felt more safe than those who responded in English.

Note: Q4 received 25 Spanish responses. Responses are currently being translated and will be reflected in the next reporting cycle.



1,891 survey respondents; Response Language is determined by language of the google form and mailed survey.

Note: Survey Introduction Letter goes out in English, Spanish, Russian, and Arabic (Email and Mail). If a household needs the survey in another language other than English, they can request it to be mailed out to them.

CHALLENGES IDENTIFIED BY RESIDENTS

Free Responses (Q3)

Reasons for not feeling safe

If you did not select "Always safe" in the previous question, how much did each of the following items affect you or your household in the last 30 days:

Never
Very little
Don't know
Somewhat
A great deal

- Criminal Activity
- Drug related activity
- Feeling overpoliced
- Gun activity
- Insufficient security measures
- Lack of repairs, maintenance
- Management unresponsive
- Neighbor's behavior
- Police unresponsive
- Presence and behavior of unauthorized individuals
- Property theft/damage
- Violent behavior

Challenges Ranked by % Negative

Challenge	% Negative	Rank
Criminal Activity	59.7%	1
Insufficient security measures	57.1%	2
Neighbor's behavior	55.6%	3
Lack of repairs, maintenance	54.5%	4
Presence and behavior of unauthorized individuals	52.3%	5
Drug related activity	50.1%	6
Management unresponsive	48.9%	7
Gun activity	48.0%	8
Property theft/damage	46.2%	9
Violent behavior	43.1%	10
Police unresponsive	41.9%	11
Feeling overpoliced	18.7%	12

% Negative is calculated as the number of respondents who answered “A great deal” or “Somewhat” (red (1) and orange (2) on previous charts) divided by the total number of respondents who answered the question.

Free Responses (Q3)

New Challenge Categories

“In the last 30 days, was there anything else that made you feel unsafe?”

Received 517 free responses in Q3

Propose creating four new categories of challenges (at least 15 free responses in each new category)

- **Harassment** (not quite “Violent Behavior”, more specific than “Neighbor’s Behavior”)
- **Neighborhood conditions** (conditions outside building or property, including speeding cars)
- **Animals** (dogs, cats, stray or otherwise)
- **Quality of housing**

Additional analysis:

- Mentions of “night” as a factor in feeling unsafe

Insufficient security measures

Free responses provided additional detail about “insufficient security measures”

Detail	Number of comments
Lighting	31
Gates/Fences	26
Security Guards	19
Cameras	17
Unit Features (windows, doors, smoke detectors)	9
Main Door	8
Residents’ cameras	7



Challenges vary by how safe residents feel

Residents who felt mostly safe show top ranked challenge to be “Lack of repairs/maintenance”

Residents who felt less safe show top ranked challenge to be “Criminal Activity”

Top Challenges of Residents who feel “Mostly Safe”
Lack of repairs/maintenance
Neighbor's behavior
Insufficient security measures
Criminal Activity
Presence and behavior of unauthorized individuals

Top Challenges of Residents who feel “Always Unsafe or Mostly Unsafe”
Criminal Activity
Insufficient security measures
Drugs
Presence and behavior of unauthorized individuals
Neighbor's behavior

HOW DO WE SURVEY RESIDENTS?

GENERAL CYCLE

OUTREACH

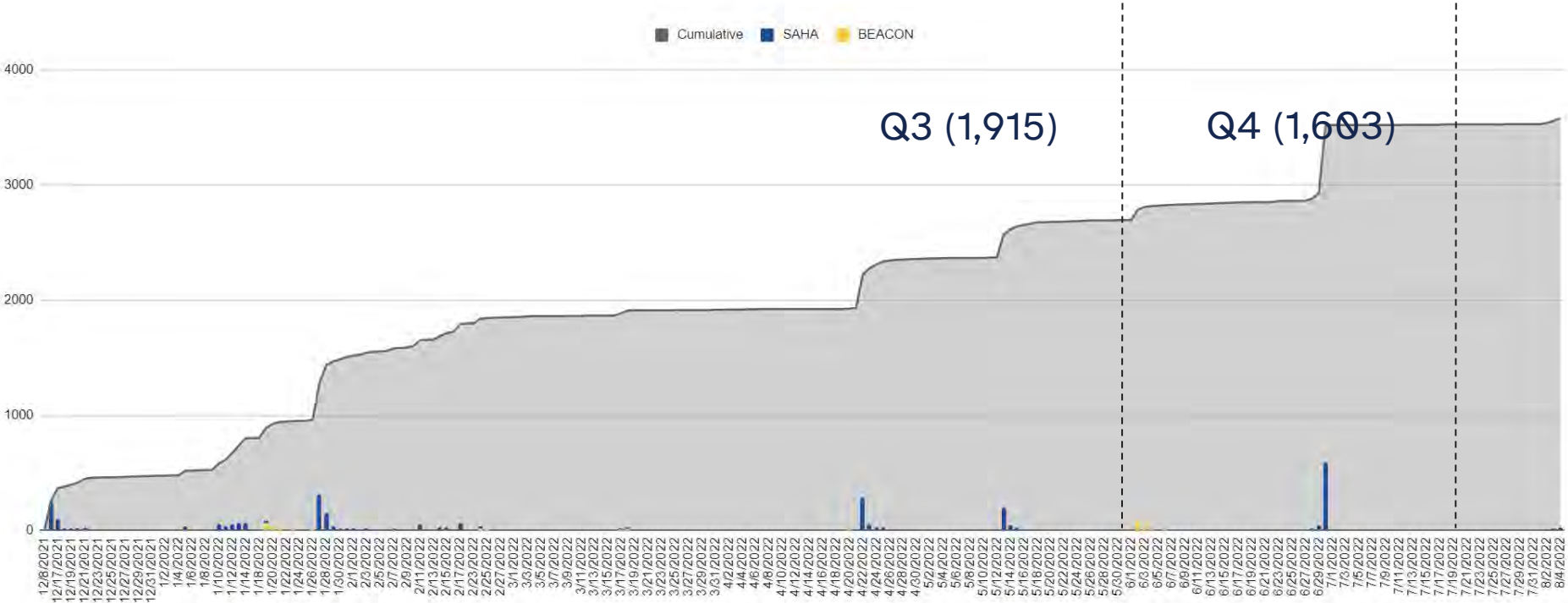
- Distribution Lists based on current residency in PH, Voucher, and Beacon
- Email to those with emails
- Mail to those without emails

MID-CYCLE REVIEW

- Review response rates
- Review demographics of those responded vs those outreached to
- Develop targeted outreach plan

TARGETED OUTREACH

- Conduct targeted outreach
- Review response rates
- Review demographics of those responded vs those outreached to



SURVEY RESPONSES TO-DATE

FUTURE ANALYSIS

MAPS

- By ZIP code
- By SAFMR Group
- By Property Groupings

DEEP DIVES

- Cross-tabulations (ie, responses by program & tenure)
- Challenges by sub-group
- Correlations with other data

PROPERTY GROUPINGS

- Household Type
- Adjacent
- Proximate (same neighborhood)
- Managing Portfolio

THREAT ASSESSMENTS

THREAT ASSESSMENTS

Transfers

12.3.B TYPES OF RESIDENT REQUESTED TRANSFERS

The types of requests for transfers that SAHA will consider are limited to requests for transfers to alleviate a serious or life threatening medical condition, transfers due to a threat of physical harm or criminal activity, reasonable accommodation, transfers to a different unit size as long as the family qualifies for the unit according to SAHA's occupancy standards. No other transfer requests will be considered by SAHA.

SAHA will consider the following as high priority transfer requests:

(1) **Member's Life is Threatened and/or VAWA - Emergency**

When SAHA has been presented with a claim of a specific threat or status as a victim of domestic violence, dating violence, sexual assault, or stalking.

See 16.7.D for necessary VAWA Documentation.

(2) **Member is Witness to Crime - Administrative Category 1**

When there has been a verified threat assessment from law enforcement indicating that a family member is the actual or potential victim of a criminal attack due to being a witness to a crime or retaliation for testimony.

(3) **Member is Victim of Hate Crime or Harassment - Administrative Category 1**

When there has been a verified threat assessment from law enforcement indicating that a family member is a victim of a hate crime or extreme harassment.

- Assessments are initiated when a resident notifies staff or staff are made aware of a situation from other individuals
- Staff will assist with the completion of verification form and will provide to security department to be assigned
- Assessments are completed by security personnel to determine if the threat is imminent
- Residents are offered a transfer to another available unit that meets their needs

QUESTIONS

EMPLOYEE SURVEY RESULTS

Operations and Real Estate Committee

August 17, 2022

Strategic Plan

SURVEY GOAL

Source of key indicators for priority employee-oriented outcomes

This first survey sets baselines

Future surveys will track any changes

Priority Outcomes

Residents live in quality housing

Residents feel safe

Residents have affordable utilities

Residents have sufficient housing choice

Employees respect and value diversity and inclusion

Employees thrive at work

Q1FY23 July 1, 2022 to July 22, 2022

SURVEY STRUCTURE

14 main questions in 5 sections

48 sub-questions

1 free response question

Sections

Recognition

Growth and
Development

Basic Needs and
Teamwork

Leadership and EDI

Demographics

Positive responses overall

RESULTS SUMMARY

Likert scale

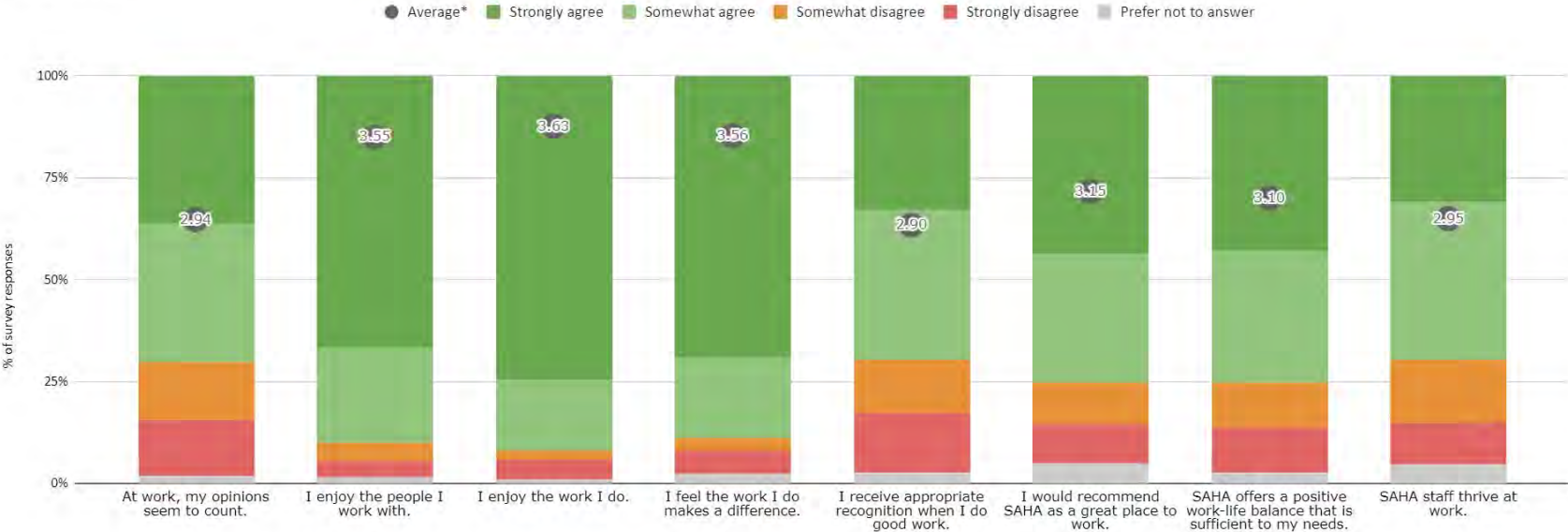
- 4: Strongly agree
- 3: Somewhat agree
- 2: Somewhat disagree
- 1: Strongly disagree
- Prefer not to answer

Highest = 3.63: “I enjoy the work I do”; “I enjoy working with my team”

Lowest = 2.90: “I receive appropriate recognition when I do good work”

RECOGNITION

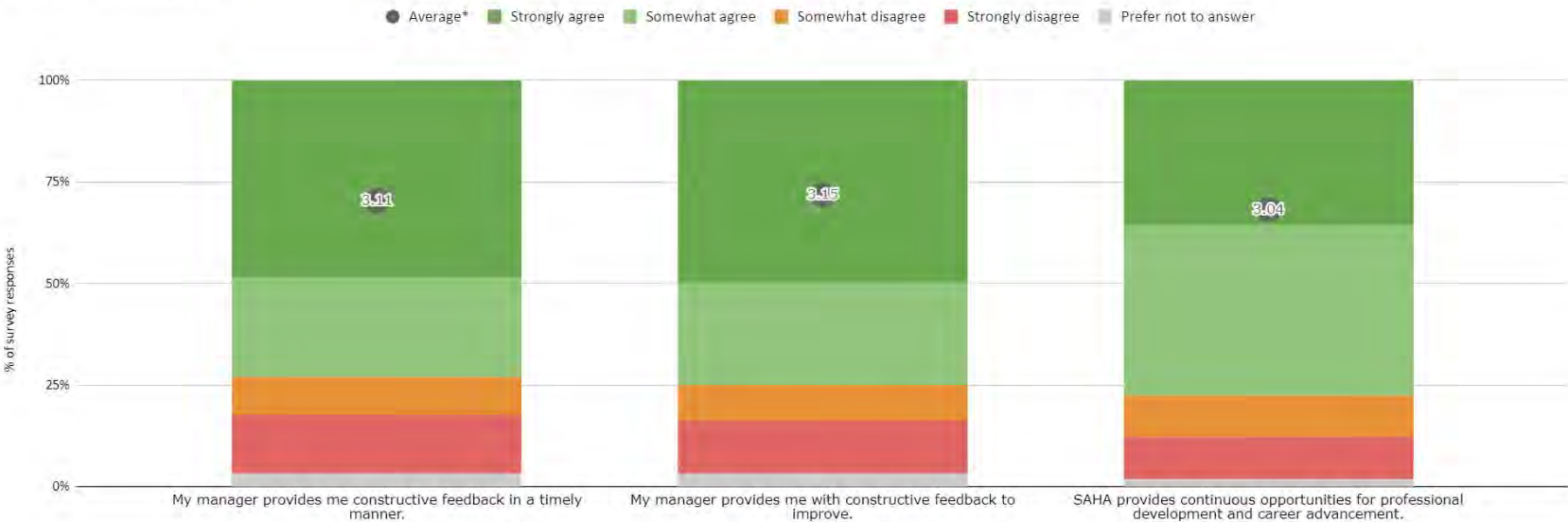
Recognition



Average Response Score for those who answered the question (1 to 4)

GROWTH AND DEVELOPMENT

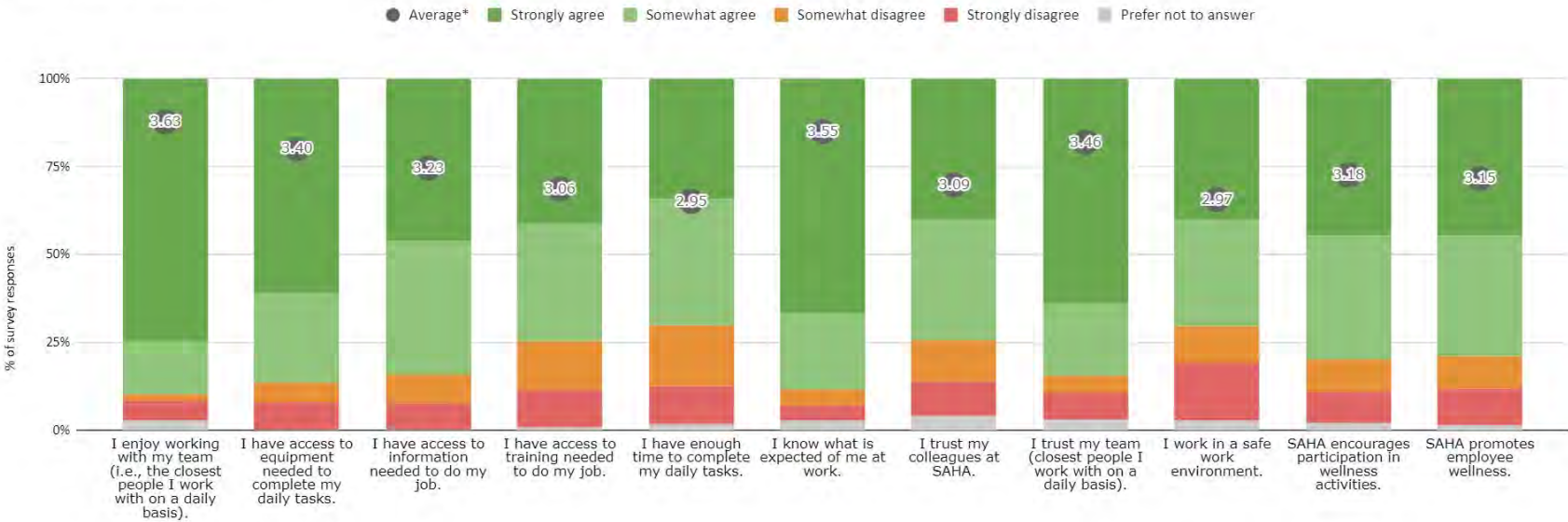
Growth & Development



Average Response Score for those who answered the question (1 to 4)

BASIC NEEDS AND TEAMWORK (1)

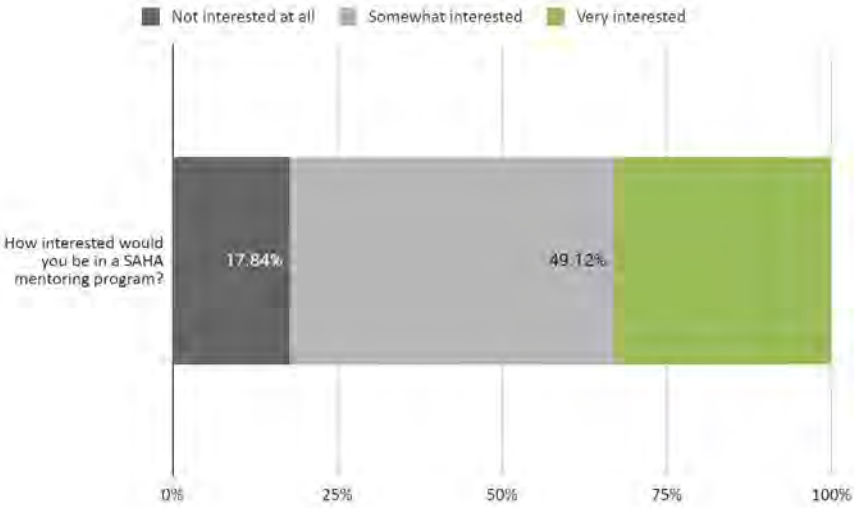
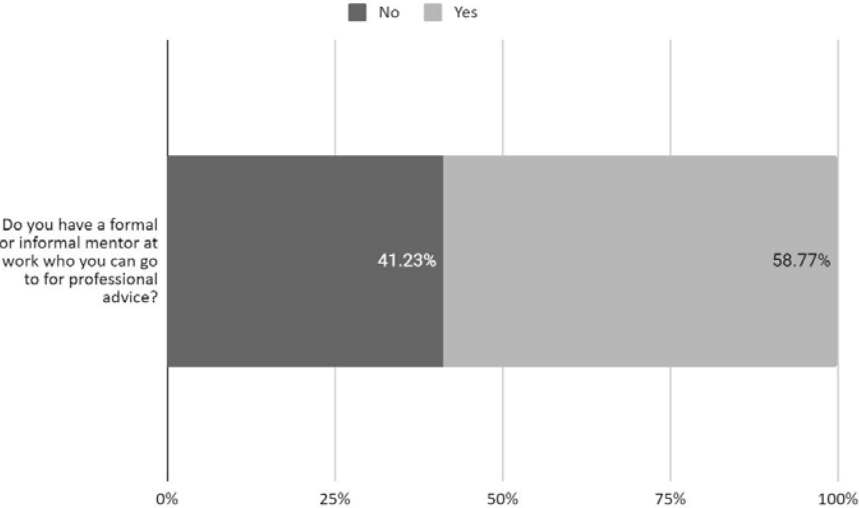
Basic Needs & Team Work



Average Response Score for those who answered the question (1 to 4)

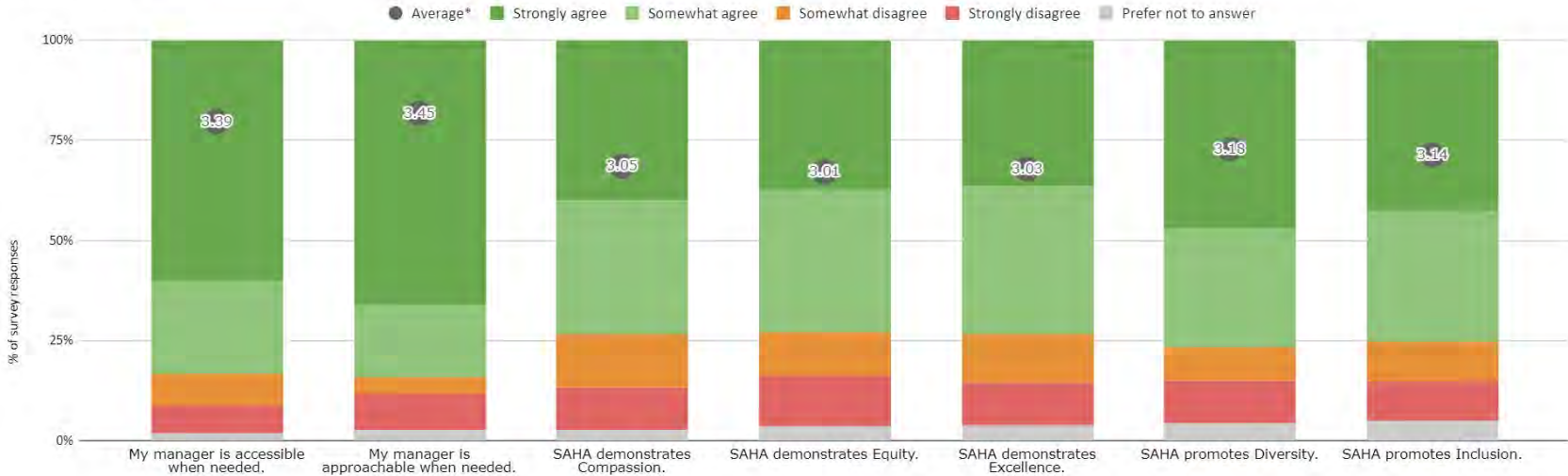


BASIC NEEDS AND TEAMWORK (2)



LEADERSHIP AND EDI (1)

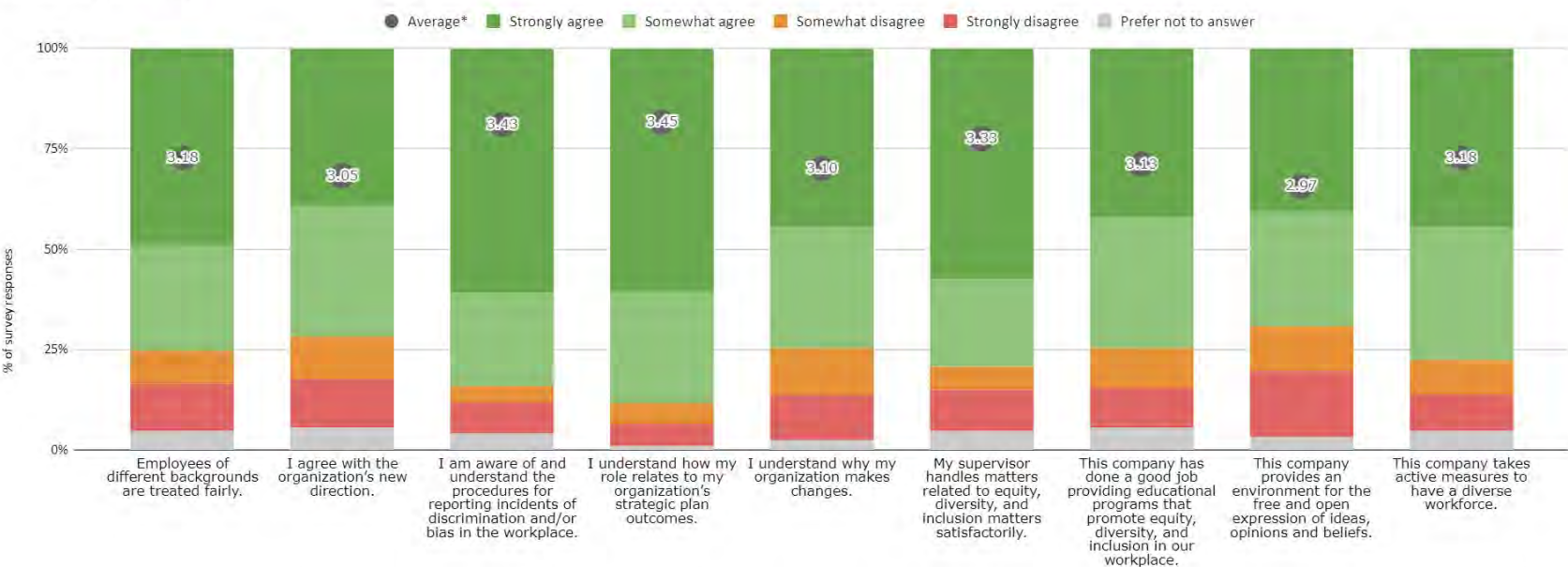
Leadership & EDI (1)



Average Response Score for those who answered the question (1 to 4)

LEADERSHIP AND EDI (2)

Leadership & EDI (2)



Average Response Score for those who answered the question (1 to 4)

Q1FY23 July 1, 2022 to July 22, 2022

SURVEY METHODS AND STATS

Anonymous survey

Google Form distributed by email to all staff

Flyer with QR code posted on PH properties

515 employees surveyed

342 survey responses

66.4% response rate

114 (22%) provided responses to an open-ended question

RESPONDER STATS

Who responded vs Workforce

- **57%** have highest education as HS Diploma/GED or Associates/ 2 year college degree
- **37%** have children
- **18%** are caregivers

Supervisor Status

70% identified as not supervisors vs **76%** of workforce

Work Location

53% work at properties vs **49%** of workforce

Tenure

47% have worked at SAHA for less than 5 years vs **57%** of workforce

QUESTIONS

RECRUITMENT UPDATE

Fiscal Year Activity: July 1, 2021 - June 30, 2022

AGENDA

- ❏ Year To Date FY 21-22
 - ❏ Total Headcount
 - ❏ Variance
 - ❏ Actual Vacancies
- ❏ Department Activity FY 22-23
- ❏ Promotions / Interim / Working Out of Class
- ❏ Temporary Status Employees

Year To Date FY 21-22

Total Headcount

DESCRIPTION	07/01/21	07/01/21 through 06/30/22
FT Headcount On 07/01/2021	518	518
New Hires	0	145
Departures	0	-158
Total Headcount	518	505

Year To Date FY 21-22

Variance

DESCRIPTION	07/01/21	07/01/21 through 06/30/22
Current Budgeted Positions	652	673
Current Total Headcount	-518	-505
Variance	134	168

Year To Date FY 21 22

Actual Vacancies

DESCRIPTION	07/01/21	07/01/21 through 06/30/22
Variance	134	168
Positions On Hold	-43	-45
Temp Status, WOCs, Interims, PreScreen Process	-35	-67
Actual Vacancies	56	56

Total FTE Staff By Department

07/01/2021 through 06/30/2022

TOTALS FOR THE PERIOD												
07/01/21 through 06/30/22												
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
Asset Management	2	1	1	0	4	0	4	4	0	0	0	0
Assisted Housing Programs	78	23	9	-1	109	-30	79	95	16	-1	-12	3
Beacon	85	39	4	-2	126	-33	93	155	62	-34	-16	12
Community Development Initiatives	43	23	2	-2	66	-17	49	59	10	-2	-10	-2
Construction	12	1	0	0	13	-3	10	14	4	-2	0	2
DSNR	8	0	0	-2	6	-1	5	9	4	-1	-2	1
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	-1	0
General Services	6	0	1	-1	6	-1	5	6	1	-1	0	0
Human Resources	9	0	2	0	11	0	11	11	0	0	0	0
Innovative Technology	9	3	0	0	12	-4	8	12	4	0	-1	3
Internal Audit	4	0	1	-1	4	0	4	5	1	0	0	1
Legal	2	0	0	0	2	0	2	2	0	0	0	0
Policy And Planning	4	0	0	0	4	0	4	4	0	0	0	0
Procurement	7	2	0	0	9	-2	7	7	0	0	-1	-1
Public Affairs	6	1	0	0	7	0	7	7	0	0	0	0
Public Housing	206	49	3	-13	245	-66	179	240	61	0	-24	37
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
Security	3	2	0	-1	4	0	4	4	0	0	0	0
TOTAL	518	145	24	-24	663	-158	505	673	168	-45	-67	56

Recruitment Actions - 07/01/2021 to 06/30/2022

Promotions

- 74 Formal Promotions
- 8 Current Working Out of Class (WOC)
- 2 Current Interims

Temporary Status Activity

- 37 Active Temporary Status Employees
- 64 Transitions from Temporary Status to FT Hires
- 174 Total Temporary Assignments - Filled To Date

Recruitment Activity

Employees' Money Pension Plan Changes

- Effective July 1, 2022, the employer contribution was raised from 7% to 11%

Reinstatement Policy

- Effective June 30, 2022, any employee returning within a year of departure, would retain benefits, paid time off, and tenure

On-Call

- Increase in On-Call pay for Maintenance Technicians

Recruitment Activity, Continued

Recruitment Campaign

- Partnership with Public Affairs to promote open positions and benefits of working for Opportunity Home San Antonio
- VIA Bus Wrap, Texas Public Radio, San Antonio Express News

Referral Bonus

- Proposed and currently under review

QUESTIONS?

TOTALS FOR THE PERIOD
07/01/22 through 08/01/22

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
Asset Management	4	0	0	0	4	0	4	4	0	0	0	0
Assisted Housing Programs	49	3	0	0	52	-1	51	66	15	-1	-12	2
Beacon	90	3	0	0	93	-3	90	132	42	-34	-16	-8
Community Development Initiatives	45	3	0	-1	47	-5	42	59	17	-2	-9	6
Construction	10	0	0	0	10	0	10	14	4	-2	0	2
DSNR	5	0	1	0	6	0	6	10	4	-1	-2	1
Equity Diversity Inclusion	0	1	0	0	1	0	1	1	0	0	0	0
Executive	9	0	0	0	9	0	9	10	1	-1	0	0
Finance and Accounting	20	0	0	0	20	0	20	24	4	-3	-1	0
General Services	5	0	0	0	5	0	5	6	1	-1	0	0
Human Resources	11	0	0	0	11	0	11	12	1	0	0	1
Innovative Technology	8	1	0	0	9	0	9	14	5	0	-1	4
Internal Audit	4	0	0	0	4	0	4	5	1	0	0	1
Legal	2	0	0	0	2	0	2	2	0	0	0	0
Operations Support	43	0	0	0	43	-1	42	56	14	0	-3	11
Policy And Planning	4	0	0	0	4	0	4	6	2	0	-2	0
Procurement	7	0	0	0	7	-1	6	7	1	0	-1	0
Public Affairs	7	0	0	0	7	0	7	9	2	0	0	2
Public Housing	174	1	0	0	175	-2	173	228	55	0	-24	31
Regulatory Oversight	2	0	0	0	2	0	2	3	1	0	1	2
Risk Management	2	0	0	0	2	0	2	2	0	0	0	0
Security	4	0	0	0	4	0	4	4	0	0	0	0
TOTAL	505	12	1	-1	517	-13	504	674	170	-45	-70	55

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022****MEMORANDUM**

To: Board of Commissioners

From: Ed Hinojosa Jr., President, and CEO

Presented by: George M. Ayala, Director of Procurement

RE: Procurement Activity Report

DS
EHJ

Through the second calendar quarter ending June 30, 2022, Opportunity Home's Procurement Department awarded 17 formal and 17 informal solicitations, receiving a total of 145 responses. This resulted in an average number of responses per formal solicitation of 3.53 and 5 responses per informal solicitations, for an overall average response rate of 4.3 per solicitation. New contracts awarded through the 2nd calendar quarter ending June 30, 2022, were \$13,308,881.94; contract renewals in the amount of \$11,511,515.29, and \$2,750,000.00 in blanket awards, which resulted in a grand total awarded of \$27,570,397.23. Of this total, \$11,759,514.19 or 42.6 percent was awarded to Small, Women-Owned, and Minority Business Enterprises (SWMBE), and \$5,391,194.04 or 1.95 percent, was awarded to Section 3 business concerns.

Through the calendar quarter ending on June 30, 2022, Opportunity Home contractors reported:

Current Section 3 workers - 0,
 Current targeted Section 3 workers - 0,
 Non-Section 3 workers - 54,
 Non-targeted Section 3 workers - 0,
 New Section 3 workers - 65,
 New targeted Section 3 workers - 4

Of the total number of workers, which is: 123; 69 of the new hires qualified as Section 3 individuals; of that number, 4 of the new hires qualified as Targeted Section 3 individuals, in total 56% percent of all hires have a Section 3 designation.

The labor hours breakdown by category is as follows:

<u>0</u>	Total Current Section 3 Workers labor hours
<u>0</u>	Total Current Targeted Section 3 Workers labor hours
<u>3,926.15</u>	Total New Section 3 Workers labor hours
<u>99.75</u>	Total New Targeted Section 3 Workers labor hours

Through the calendar quarter ending June 30, 2022, Opportunity Home has hired 8 Section 3 employees into full-time positions within the agency.

Current Solicitations: There are currently two Invitation for Bids, two Quick Quotes, and one Request For Proposals currently being advertised. The Invitation For Bids are for Foundation Stabilization and Repair for Various Locations and Foundation Stabilization for Beacon Communities. The Quick Quotes are for Central Office Interior and Exterior Signs and Sign

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

Package for Victoria Plaza. The Request For Proposals is for Re-Certification Processing Services.

Closed/Pending Solicitations: There are 6 solicitations that have closed and are currently being evaluated. The solicitations are for Turnkey WiFi Expansion for Snowden; Trauma-Related Counseling Services; Purchase of 19 Vehicles (16 mid/small trucks, 2 full size trucks, and 1 four door small vehicle); Dumpster Enclosure at LC Rutledge; Inspection, Service, and Replacement of Fire Extinguishers; and Make Ready Services for Costa Valencia, Cottage Creek, and Rosemont at Highland Park.

Solicitations in Development: Procurement is currently working on a number of solicitations for advertisement. These include: Fair Market Rent Survey; Consulting Services for Rental Market Study; Gate Security; Central Office Lobby Renovations; Automatic Doors for Victoria Plaza; Parcel Lockers; Residential Real Estate Broker; Commercial Real Estate Broker; Build San Antonio Green (BSAG) Professional Services; Affordable Home Construction Services; Furniture, Fixtures, and Equipment for Snowden; Decals for Fleet Vehicles and Golf Carts; Audit of Opportunity Home's Pension Plan; Temporary and Contract Personnel Services; Administrator for Opportunity Home's 4757(b) Plan; Uniform Apparel, Custom Embroidery, and Imprinting Services; Refresh Signs; Roof Replacement - Alazan Administration Building; Intrusion Protection and Security Cameras for Multi-Level Properties; Make Ready for 101 Riverside; Siding Repairs for Cross Creek Apartments; Various Security Services; Debt Collection Services; Recertification and Case Management Services; Inspection, Evaluation, Repair and/or Stabilization of Foundations; and Foundation Repairs, Plumbing, and Structural Improvements.

Blanket Awards:

Contract Title	Number of Awards	Amount of Blanket Award	Projects Awarded 2nd Quarter 2022
Architectural and Engineering Services	8	\$1,500,000.00	\$107,315.15
Architectural & Engineering and Other Forensic Consulting Services	4	\$1,500,000.00	\$0.00
Backflow Inspection, Maintenance, Repair, and Installation	2	\$70,000.00	\$7,273.00
Abatement of Hazardous Materials	2	\$250,000.00	\$1,539.00
Automated and Manual Bulk Pick Up Services	2	\$550,000.00	\$116,037.13
Carpet and Flooring Purchase, Replacement, and Installation	3	\$1,000,000.00	\$148,507.85

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

Concrete and Asphalt Maintenance and Repair	2	\$1,000,000.00	\$18,059.86
Consulting and Guidance on HUD and Other Affordable Housing Programs	2	\$100,000.00	\$179.00
Disaster Restoration of Operation Services	3	\$250,000.00	\$0.00
Electrical Maintenance & Repair	2	\$500,000.00	\$107,262.93
Engineering, Environmental	6	\$1,200,000.00	\$70,275.00
Engineering, Professional	6	\$1,500,000.00	\$80,630.17
Exterior and Interior Painting	2	\$250,000.00	\$400.00
Land Surveyor Services	3	\$250,000.00	\$8,200.00
Legal Services	7	\$500,000.00	\$36,675.85
Bond/Mixed Finance Counsel	5	1% of Bond of Issue	
Special Counsel Board Matters	1	\$125,000.00	\$12,907.25
Make Ready Services for Public Housing	3	\$2,200,000.00	\$597,323.19
Mowing and Grounds Maintenance for Beacon Communities	4	\$500,000.00	\$136,492.40
Mowing and Grounds Maintenance for Public Housing	4	\$1,000,000.00	\$318,306.82
Painting Services for Beacon Communities	2	\$245,000.00	\$102,166.50
Painting, Exterior and Interior	2	\$250,000.00	\$198,523.87
Pest Control for Beacon Communities	2	\$420,000.00	\$26,579.09
Pest Control for Various Opportunity Home Public			

OPPORTUNITY HOME SAN ANTONIO**August 17, 2022**

Housing and Administrative Properties	2	\$650,000.00	\$125,833.57
Plumbing and Related Maintenance Services	2	\$2,200,000.00	\$575,260.13
Public Relations Consulting Services	2	\$150,000.00	\$35,053.00
On Call Real Estate Appraisal Services	2	\$250,000.00	\$5,725.00
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	\$35,010.00
Security Services, Various	3	\$1,110,000.00	\$454,537.11
Shingle roof repair and limited replacement	1	\$250,000.00	\$23,412.25
Temporary and Contract Personnel Services	4	\$3,670,112.00	\$1,030,547.31

PROPOSED ACTION:

None at this time.

FINANCIAL IMPACT:

Amounts paid according to award provisions.

STRATEGIC OUTCOME:

Supports all strategic outcomes.

ATTACHMENTS:

Procurement Activity Report

Procurement Activity Report as of August 2, 2022				
Solicitations Currently being Advertised				
SAHA Department	Type	Solicitation Name	Bidders Conference	Closes
Public Affairs	QQ	Central Office Interior and Exterior Signs	N/A	08/16/2022
Assisted Housing Programs and Beacon Communities	RFP	Re-Certification Processing Services	N/A	08/16/2022
Public Housing	IFB	Foundation Stabilization and Repair for Various Locations	N/A	08/16/2022
Beacon Communities	IFB	Foundation Stabilization for Beacon Communities	N/A	08/16/2022
Construction Services	QQ	Sign Package for Victoria Plaza	N/A	08/18/2022
SAHA Department	Type	Solicitation Name	Date Closed	August 17, 2022 Special Board Meeting and September 7, 2022 Regular Board Meeting
Development Services	RFP	Property Management Services for Snowden Apartments	07/27/2022	
Solicitations Under Evaluation				
Innovative Technology	Coop-Award	Turnkey WiFi Expansion for Snowden	05/20/2022	Procurement Negotiations, Due Diligence, and Evaluation
Human Resources	RFP	Trauma-Related Counseling Services	07/07/2022	
Beacon Communities	Coop Award	Purchase of 19 Vehicles (16 mid/small trucks, 2 full size trucks, and 1 - four door small vehicle)	07/15/2022	
Public Housing	QQ	Dumpster Enclosure at LC Rutledge	07/19/2022	
Agency Wide	IFB	Inspection, Service and Replacement of Fire Extinguishers	08/02/2022	
Beacon Communities	IFB	Make Ready Services for Costa Valencia, Cottage Creek, and Rosemont at Highland Park	08/03/2022	
Future Solicitations		Solicitation Name	Anticipated Month of Release	
Assisted Housing Programs		Fair Market Rent Survey	August 2022	
Beacon Communities		Consulting Services for Rental Market Study	August 2022	
		Gate Security	September 2022	
Construction Services and Sustainability		Central Office Lobby Renovations	August 2022	
		Automatic Doors for Victoria Plaza	August 2022	
DSNR		Parcel Lockers	Department Hold	
		Residential Real Estate Broker	August 2022	
		Commercial Real Estate Broker	August 2022	
		Build San Antonio Green (BSAG) Professional Services	August 2022	
		Affordable Home Construction Services	August 2022	
		Furniture, Fixtures, and Equipment for Snowden	August 2022	
General Services		Decals for Fleet Vehicles and Golf Carts	August 2022	
Human Resources		Audit of SAHA's Pension Plan	August 2022	
		Temporary and Contract Personnel Services	August 2022	
		Administrator for SAHA's 457(b) Plan	September 2022	
Public Affairs		Uniform Apparel, Custom Embroidery, and Imprinting Services	Department Hold	
Public Housing		Refresh Signs	Department Hold	
		Roof Replacement - Alazan Administration Building	Coop- Award	
		Intrusion Protection and Security Cameras for Multi-Level Properties	August 2022	
		Make Ready for 101 Riverside	August 2022	
		Siding Repairs for Cross Creek Apartments	Department Hold	
Security		Various Security Services	August 2022	
Organization Wide		Debt Collection Services	Organization Hold	
		Recertification and Case Management Services	August 2022	
		Inspection, Evaluation, Repair and/or Stabilization of Foundations	August 2022	
		Foundation Repairs, Plumbing, and Structural Improvements	September 2022	

Categories of Procurements

SAHA Department	Solicitation Name	Vendor	Amount	Date
Awards Under President and CEO Expanded Authority				
There were no awards under this category for this reporting period.				
Awards Under Contracting Officer Authority				
General Services	Installation of Water Fountains at Central Office	Addison Prime	\$26,496.00	07/26/2022
Public Housing	Foundation Stabilization at 97 Gus Garcia	Alamo HyTech Foundation	\$30,775.00	07/26/2022
Innovative Technology	Wrike License Renewal	Softek	\$16,200.00	07/13/2022
Public Housing	Concrete Removal and Sod Installation for MC Beldon Apartments	DCA Contractors LLC	\$4,878.31	08/01/2022
IT Purchases (Resolution 6010 authorizing the use of Cooperative Purchasing Contracts and General Services Administration (GSA Federal Supply Schedules))				
Innovative Technology	Consulting Services	Denovo Ventures LLC	\$65,000.00	6/24/2022
Innovative Technology	Application Lifecycle Management	Denovo Ventures LLC	\$68,400.00	6/28/2022
Innovative Technology	Network Infrastructure Engineer and Systems Administration Resources	Barcom	\$35,100.00	7/29/2022
Innovative Technology	Application Managed Services and Infrastructure and Platform Managed Services	Denovo Ventures LLC	\$194,400.00	7/30/2022



FHP QUARTERLY UPDATE REPORT

Fiscal Year 2021-22
Q4: April-June 2022

FHP WAITLIST REPORT

HOUSING CHOICE VOUCHER WAITLIST

2,963

Total of Current Applicants on Waitlist

2,013

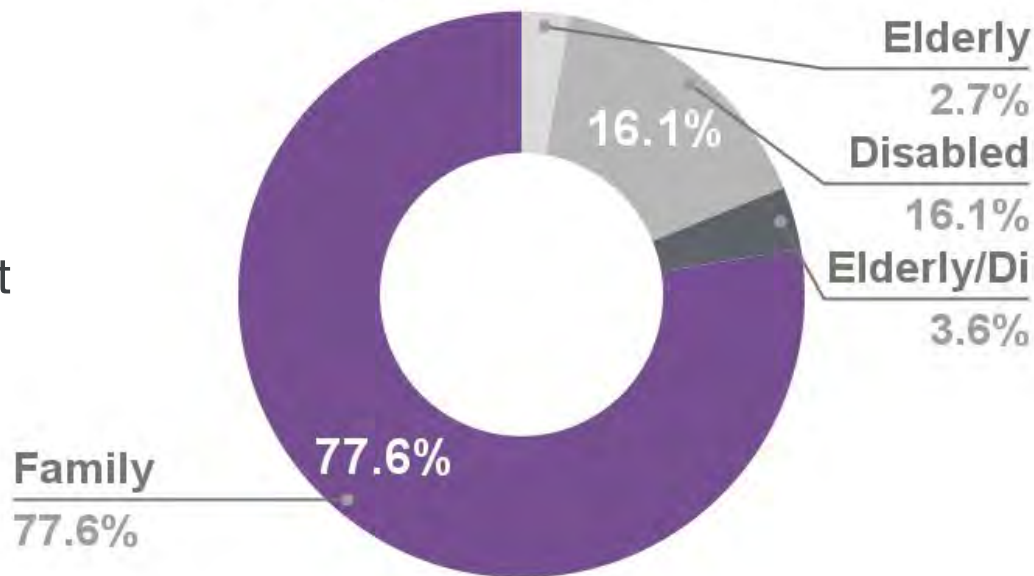
Total of Applicants Selected Apr-Jun

474

Total Number of Applicants Removed from Waitlist

LEASE-UP SUCCESS RATE

The lease-up success rate increased from 87% in FY22-Q3, potentially due to the higher payment standards that were implemented January 1, 2022. Families took more time to find suitable units, and were able to lease up April - June.



TOP REASONS FOR REMOVAL

Letter Returned Undeliverable
Applicant Requested Removal
No Response

91.6%

FHP WAITLIST REPORT

PUBLIC HOUSING WAITLIST

55,736

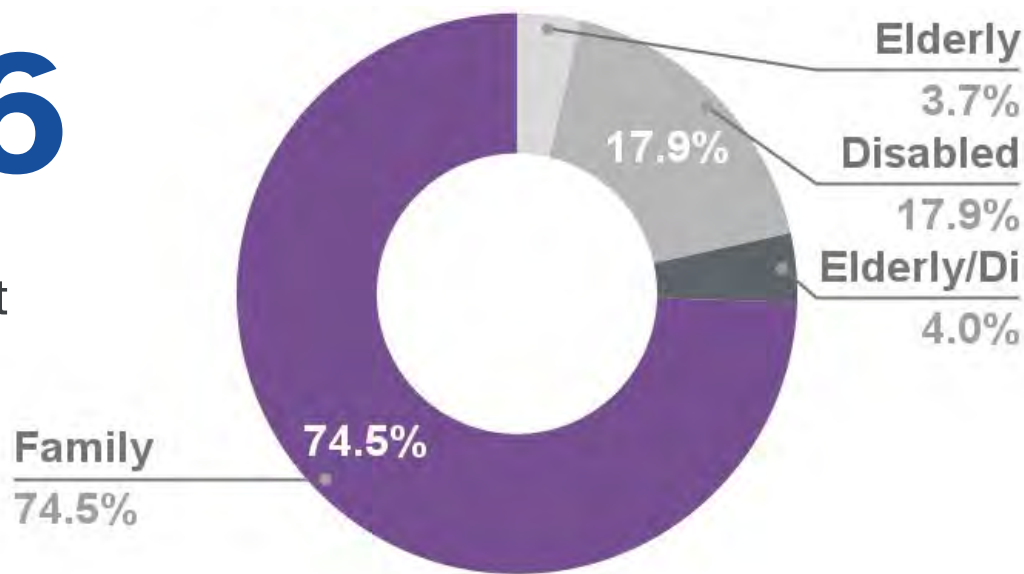
Total of Current Applicants on Waitlist

222

Total of Applicants Selected Apr-Jun

802

Total Number of Applicants Removed from Waitlist



TOP REASONS FOR REMOVAL

No Response

Letter Returned Undeliverable

Applicant Requested Removal

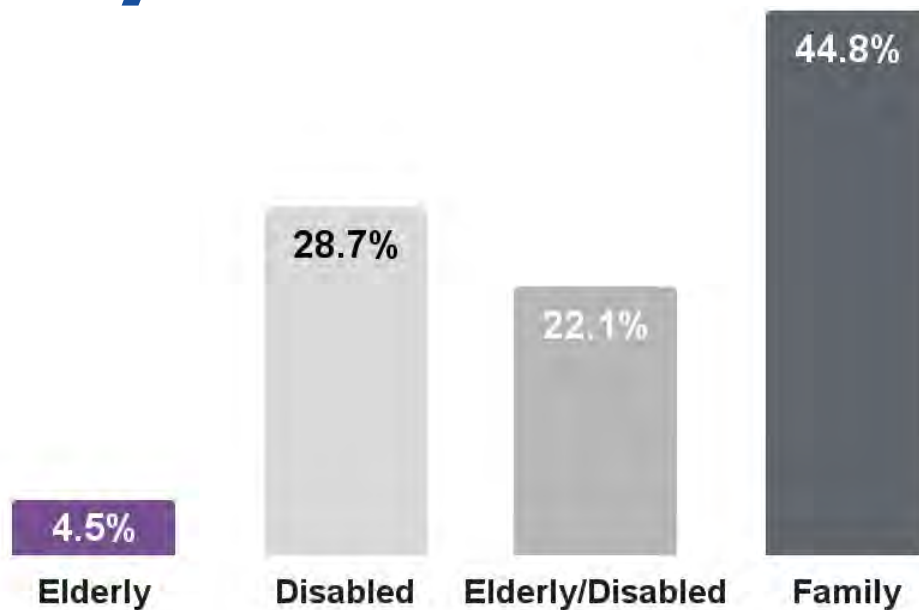
LEASE-UP SUCCESS RATE

The lease-up success rate for Public Housing is unavailable for this quarter due to the waitlist transition. Previously, approximately 70 waitlists were active at one time, each one representing a different PH property. The waitlist was consolidated to only 3 lists to categorize the communities: General Occupancy, Elderly/Disabled, and Accessible Units. This rate will be noted in future months as applicants are drawn from the new waitlist structure.

FHP DEMOGRAPHICS REPORT

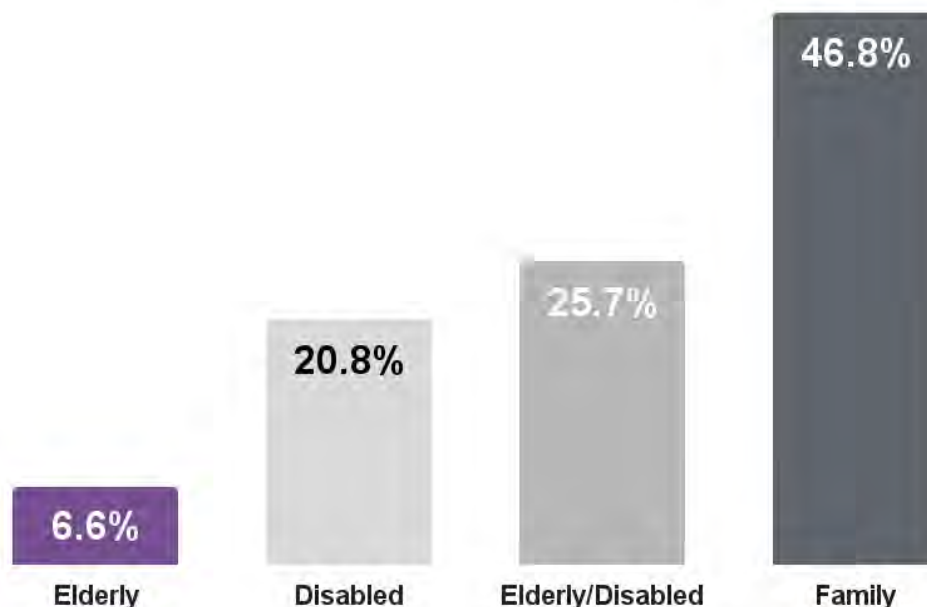
ASSISTED HOUSING PROGRAMS

11,639 Total Number of Families in AHP



PUBLIC HOUSING PROGRAM

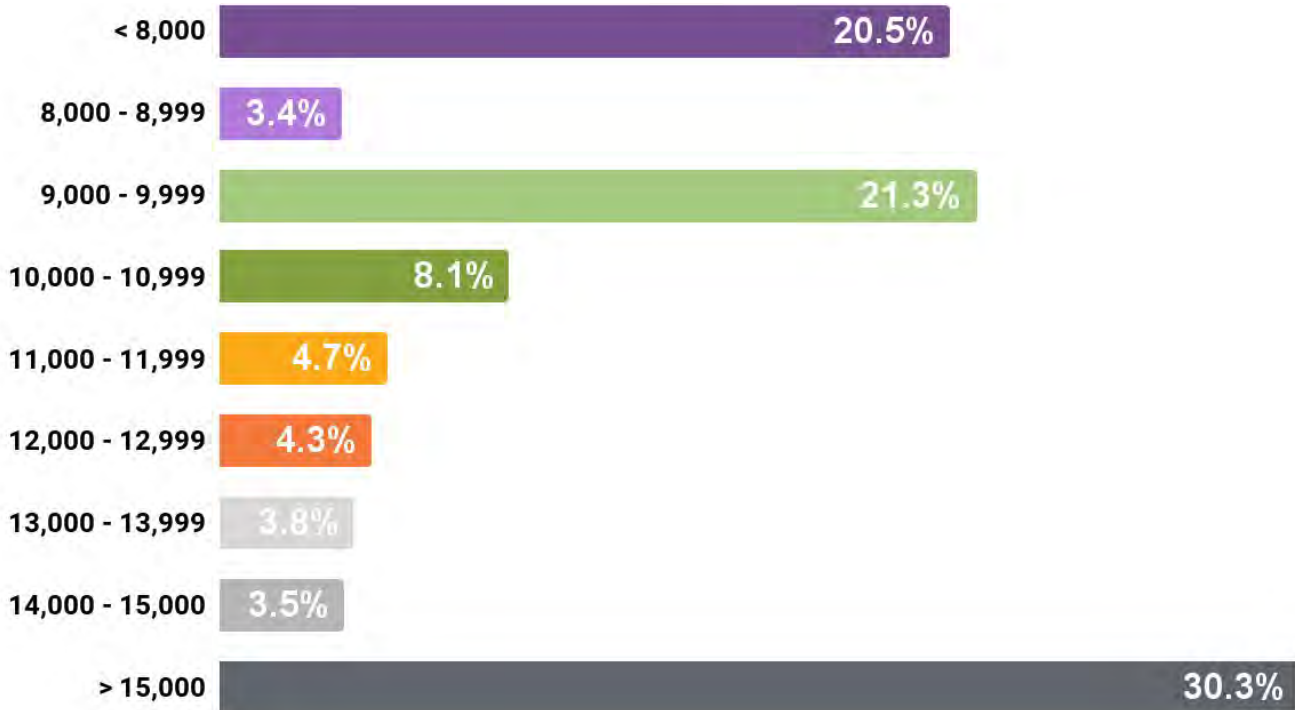
5,544 Total Number of Families in PH



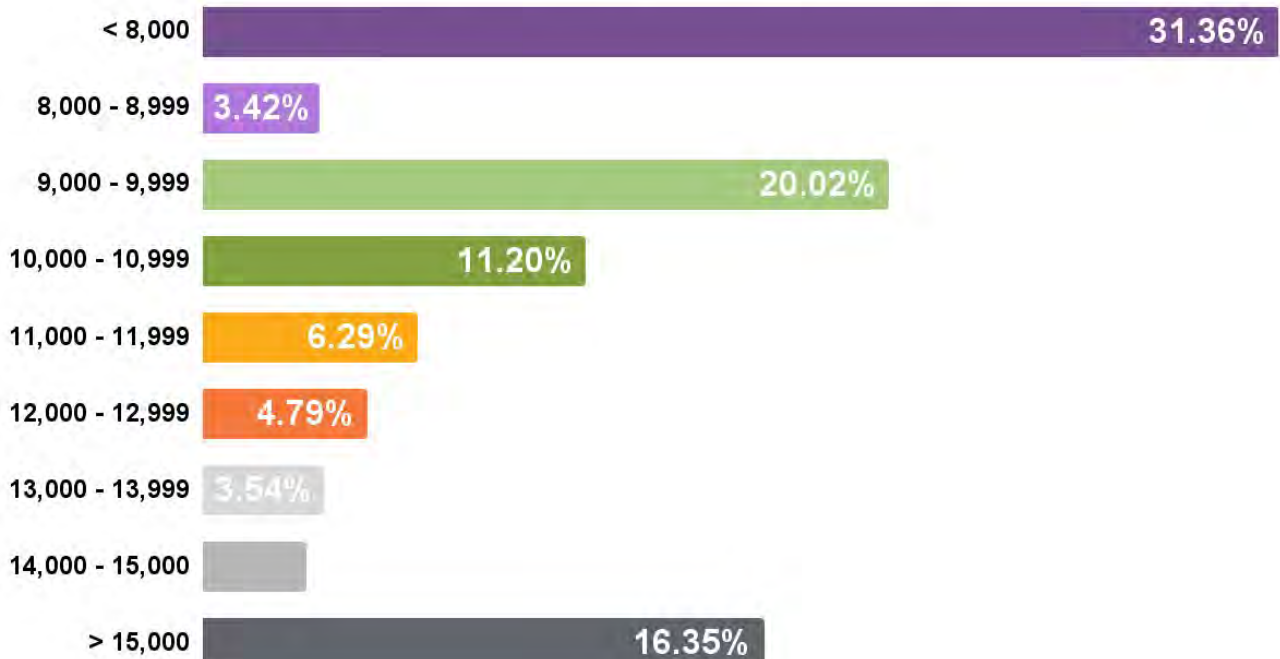
FHP INCOME REPORT

\$9,882 FHP MEDIAN
GROSS INCOME

AHP PERCENTAGE OF HOUSEHOLDS BY GROSS INCOME



PH PERCENTAGE OF HOUSEHOLDS BY GROSS INCOME



AHP UTILIZATION REPORT

ACC* UTILIZATION

79.6%

Units Available per ACC: 13,251



MONTH	APR	MAY	JUN
UNITS LEASED	10,650	10,535	10,461
PERCENTAGE	80.4%	79.5%	78.9%

MTW UTILIZATION

85.4%

Units Available per MTW: 12,351



MONTH	APR	MAY	JUN
UNITS LEASED	10,650	10,535	10,461
PERCENTAGE	86.2%	85.3%	84.7%

*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, Opportunity Home 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**

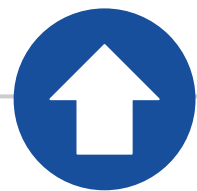
94.6%



MONTH	APR	MAY	JUN
UNITS LEASED	5,735	5,749	5,747
UNITS AVAILABLE	6,070	6,070	6,070
PERCENTAGE	94.5%	94.7%	94.7%

AVERAGE NUMBER OF VACANCIES

The average number of vacancies increased from 298 in FY22-Q3 due to continued initiatives to fill vacancies at the new Legacy at Alazan community. Additionally, the PH eligibility process was taken over by the Admissions Team, which has been working through the new procedures and making improvements.



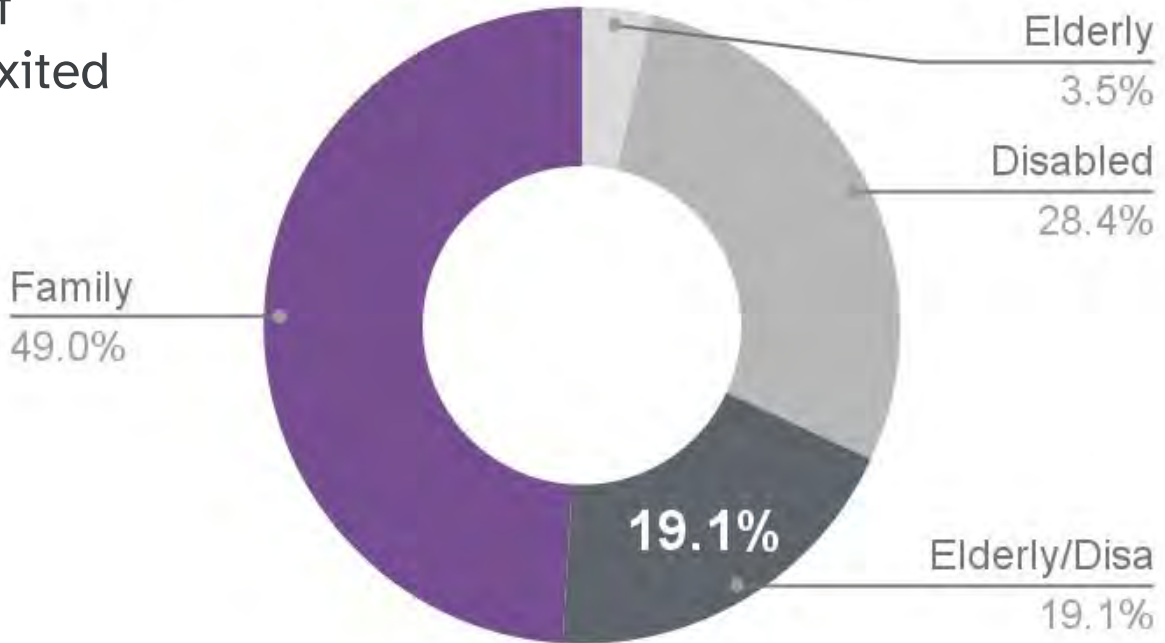
326

FHP PROGRAM EXITS REPORT

HOUSING CHOICE VOUCHER EXITS

Total Number of
AHP Families Exited

257



TOP EXIT REASONS

End of Participation: 21.0%

Vacating Without Notification: 18.7%

Deceased: 13.6%

7.1 Years Average Tenure
of Clients Exited

FHP PROGRAM EXITS REPORT

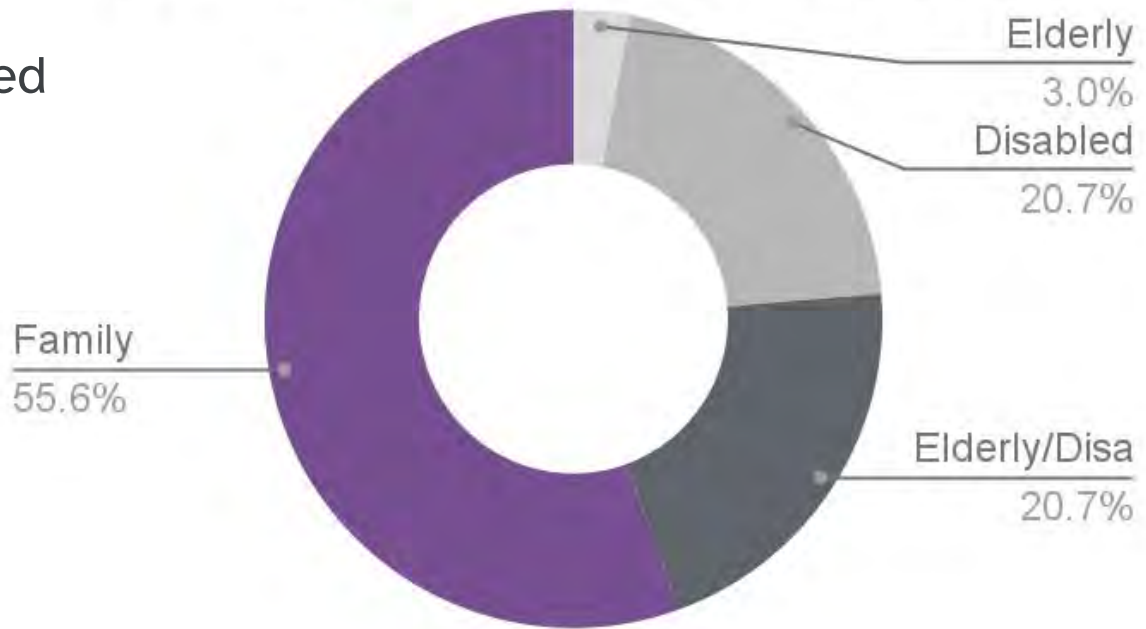
PUBLIC HOUSING EXITS

Total Number of
PH Families Exited

135

Evictions
Through Court

13



TOP EXIT REASONS

30-Day Notice to Opportunity Home Without
Reason: 27.8%

Abandoned/Skip-Out: 15.6%

Deceased: 15.6%

5.1 Years

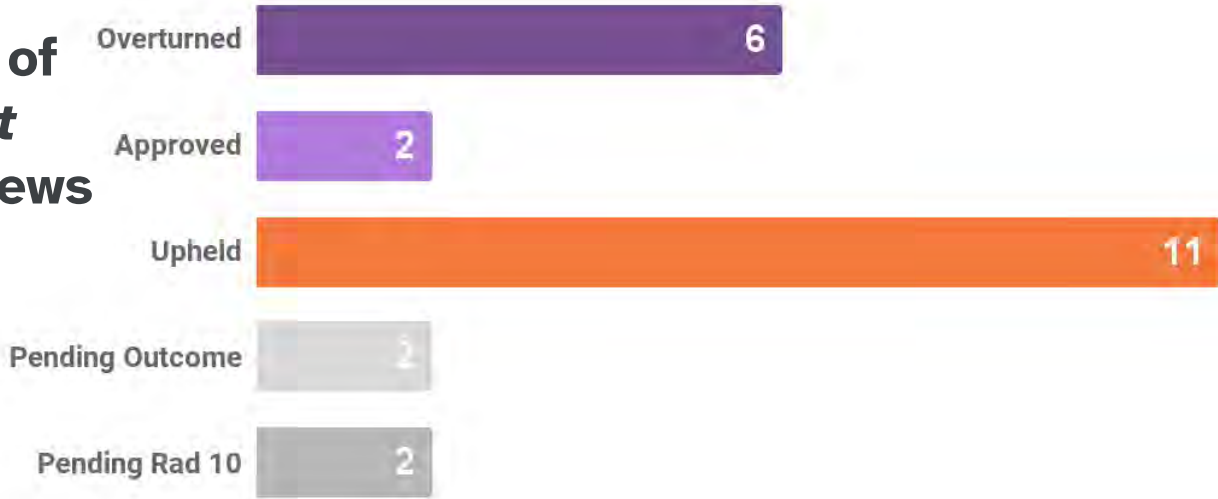
Average Tenure
of Clients Exited

FHP INFORMAL REVIEW/HEARING REPORT

HOUSING CHOICE VOUCHER PROGRAM

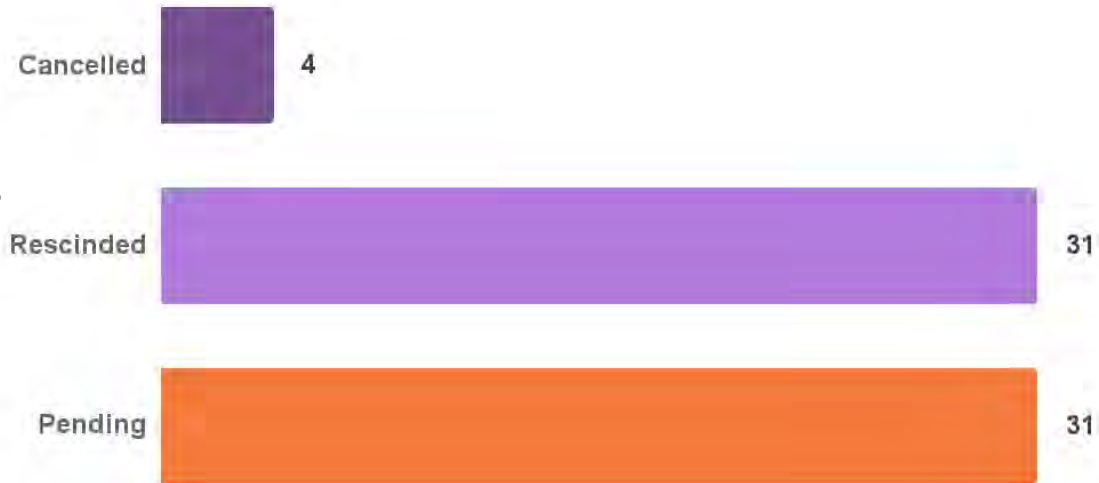
**Total Number of
AHP *Applicant*
Informal Reviews**

23



**Total Number of
AHP *Family*
Informal Hearings**

66



Top Reasons for Informal Review (*Applicants*)

Criminal History Record: 47.8%

Expired Voucher: 30.4%

Over Income Limit: 8.7%

Top Reasons for Informal Hearing (*Families*)

Missed Inspections: 37.7%

Expired RAD-10 (request for documents): 15.6%

Expired Voucher: 12.1%

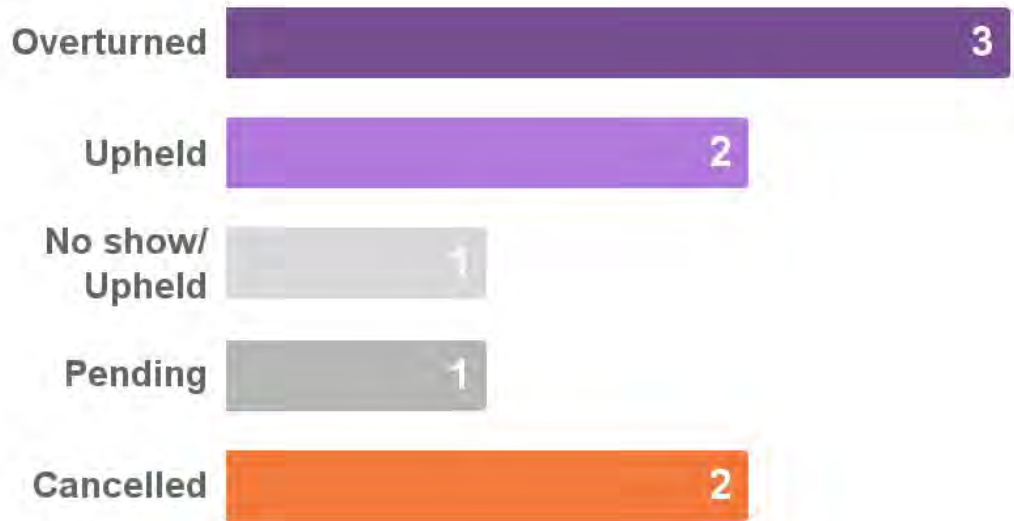
Vacating without Notification: 12.1%

FHP INFORMAL REVIEW/HEARING REPORT

PUBLIC HOUSING PROGRAM

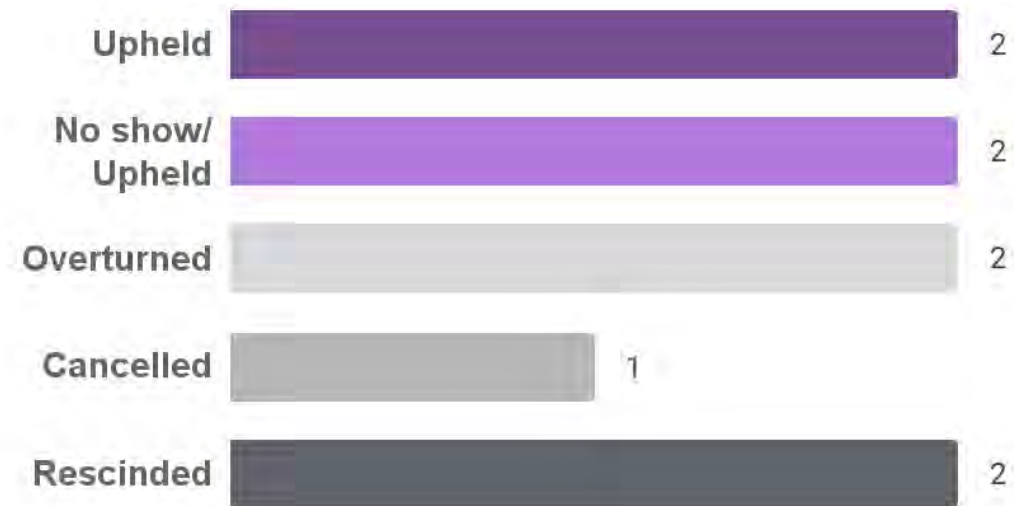
Total Number of PH *Applicant* Informal Hearings

9



Total Number of PH *Resident* Informal Hearings

9



Top Reasons for Informal Hearing (*Applicants*)

No Response (to waitlist letter):
33.3%

Criminal History (Violence):
33.3%

Did Not Complete Eligibility:
22.2%

Top Reasons for Informal Hearing (*Residents*)

Transfer List Withdrawal: 22.2%

Dispute Charges: 22.2%

Lease Violation: 22.2%

SAFMR REPORT

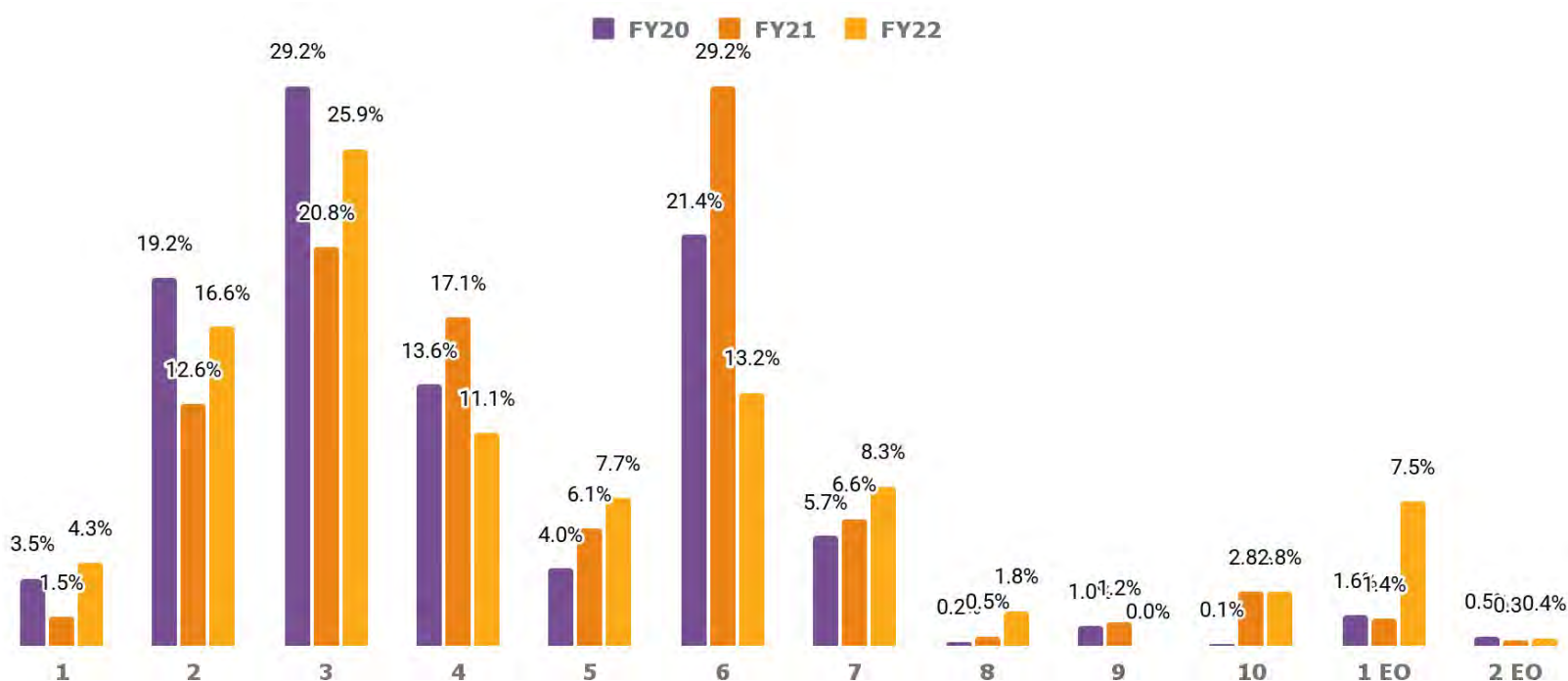
MTW SAFMR

	FY21	FY22
Average HAP	\$629.28	\$659.00
Average Contract Rent	\$887.84	\$941.70

Opportunity Home'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 Opportunity Home'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 by Groups. In FY22, there were a total of 506 new admissions.

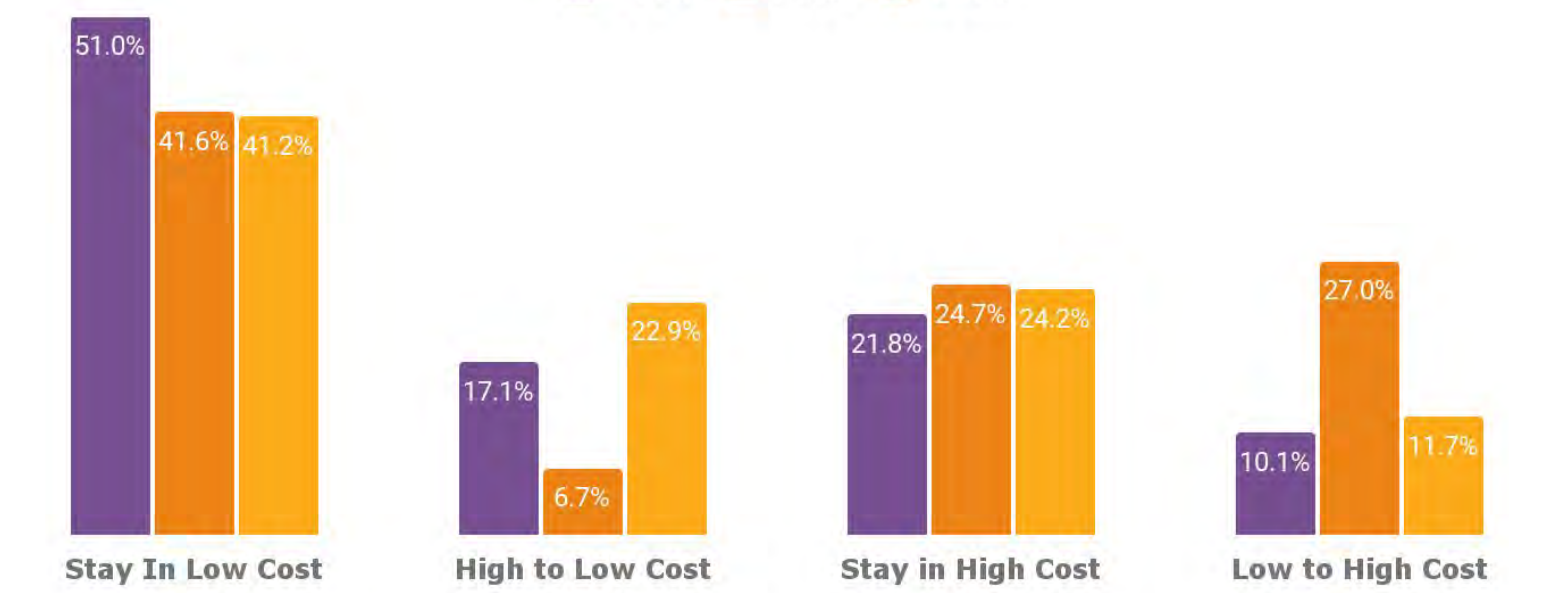


SAFMR REPORT

Moves

The graph below compares the geographic distribution of moving families between low-cost and high-cost neighborhoods in FY20, FY21 and FY22. In FY22, a total of 985 families moved at the time of their annual reexamination.

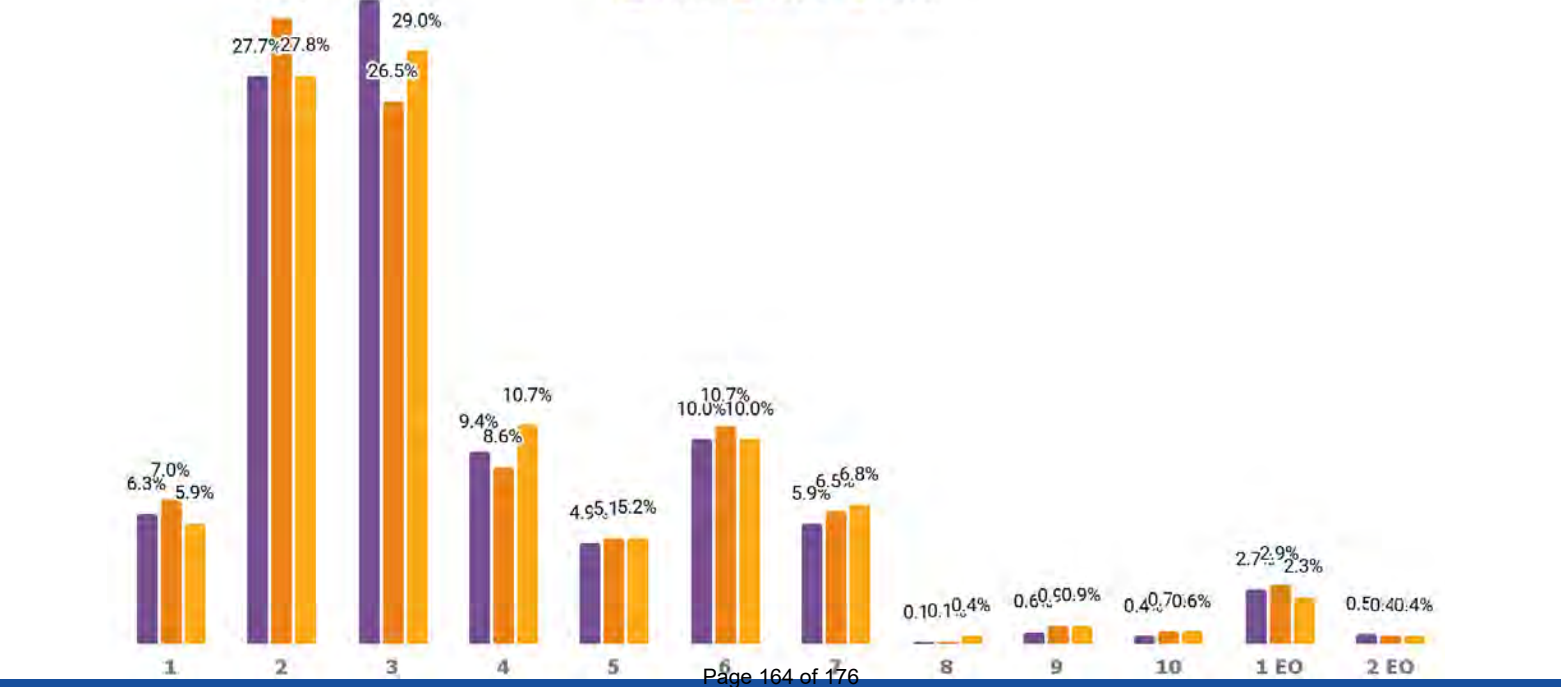
FY20 FY21 FY22



In Place

The chart below the number in-place families between FY20, FY21 and FY22 by Groups. In FY22, a total of 4,965 families stayed in place at the time of their annual reexamination.

FY20 FY21 FY22



PH RENT PAYMENTS

Although Opportunity Home's eviction moratorium for non-payment of rent ended February 2022, Public Housing residents have been continually informed of rent payment options and repayment agreements.

Staff take every opportunity to update residents' income and lower the rent payment if they have experienced any income decreases or hardships.

- In March 2022, an estimated average of **83%** of residents were able to make their monthly rent payments.
- As of June 2022, an estimated average of **81%** of residents were able to make their monthly rent payments, a decrease of 2%. The total amount of delinquent rent was 19%.

ASSISTANCE EVENTS

Events were held at Mission Park and Riverside communities to provide residents an opportunity to speak with staff and partners at CPS Energy about ways to pay utilities.

Community	Residents Signed up for Assistance
Mission Park	20
Riverside	10

FY22-Q4 DEPARTMENT TRAINING

Below are the various department-wide training courses administered during FY22-Q4.

Public Housing Programs

- FY22-23 Admissions & Continued Occupancy Policy Changes
- OAG Reminders
- Threat Assessment SOP
- Unified Application Center (UAC) FAQs

Assisted Housing Programs

- FY22-23 Administrative Plan Changes
- OAG Reminders
- Family Expense Summary Refresher
- Repayment Agreements for Applicants
- How to Pull a Rent Comparable

ANTICIPATED TRAINING

Below are training topics anticipated to be presented to staff during FY23-Q1.

- Common EIV/PIC Errors (AHP & PH Operations)
- Reasonable Accommodations (All Staff)
- Check Run, Abatements, Adjustments, Payment Holds (AHP Operations)
- Rent Calculation Refresher (AHP & PH Operations)

Additionally, the New PH CSS Training curriculum will be piloted in FY23-Q1.

ON THE HORIZON

OTHER PROGRAM UPDATES

- **Triennial Recertifications in PH and AHP:** All families in PH and AHP will be transitioned to a Triennial Recertification schedule, meaning that they will be recertified for program eligibility every three years. Currently, only families classified as “elderly” or “disabled” are on a Triennial schedule, and all other families in Moving to Work programs are recertified every two years.
 - This change will alleviate the burden on families to report their household income every two years, and alleviate the staff burden of processing recertifications as often.
- **PH Lease Updates:** Changes requested by resident advocates are being reviewed and will be incorporated into the PH Lease and future, updated Resident Handbook.
- **Updated AHP Payment Standards:** Payment standards were updated July 1, 2022 to provide searching voucher families with a higher shopping allowance and a greater chance of leasing up. However, local rents have continued to rise, so in an effort to further meet those requested rents, we are looking to implement a second increase effective retroactively on August 1, 2022.



RESIDENT SERVICES REPORT

Fiscal Year 2021-22

Q3-Q4: January - June 2022

SUMMARY

The Semiannual Resident Services Report includes inquiries from Public Housing (PH) residents, Assisted Housing Programs (AHP) families and landlords, and applicants to both programs. This report provides a breakdown of inquiries, received from the months of January 2022 through June 2022 to the Resident Services team.

20,220

Total Number of
FHP Calls Answered

6,981

Total Number of
FHP Emails Received

5,056

Total Number of FHP
Voicemails Received
(option when wait
times are high)

COVID-19 IMPACT

The number of calls received continues to be extremely high even as Opportunity Home's offices are now open. There are currently eight staff members providing guidance and support to residents: four in the lobby and four on phones.

SERVICE LOG

Client Services staff submit all transaction information manually through a data collection log. Staff used these numbers, in conjunction with reporting provided by our RingCentral phone system, to obtain the numbers noted in this report.

APPLICANT INQUIRIES

7,059

Total Number of Applicant Inquiries

TOP INQUIRIES

1	Waitlist Status	4,563
2	Program Information	1,296
3	Eligibility Questions	1,200

OVERVIEW

The highest number of inquiries received in the call center came from applicants requesting their status on the waitlist. Those inquiries made up more than half of the overall calls received from applicants during this period. The call center also received requests from applicants who had questions regarding eligibility requirements after they received their pre-eligibility packet, questions about their eligibility packet, and questions about their eligibility appointment letter.

ASSISTED HOUSING PROGRAMS

TOP INQUIRIES

33,091

**Total Number of
AHP Inquiries**

TOP INQUIRIES

1

Recertification

2,587

2

Inspection Status

2,082

3

Housing Assistance Payment Status 1,945

OVERVIEW

The Landlord Liaison received and responded to 4,268 emails from participating landlords, an increase of 1,293 emails from the last reporting period. Inquiries included status of Housing Assistance Payments (HAP), interest in becoming a participating landlord, requests for rent increases, tenancy approvals, inspection updates, and lease violations. A total of 56 new owners partnered with Opportunity Home during this period to lease units to voucher holders.

PUBLIC HOUSING

TOP INQUIRIES

350

**Total Number of
PH Inquiries**

HIGHEST NUMBER OF INQUIRIES

1 Alazan **2** Cassiano **3** Lincoln Heights

TOP INQUIRIES

1

Transfer/Request Status

77

2

Maintenance/Work Orders

45

3

Customer Service

42

OVERVIEW

Transfers were requested due to units in need of repair, residents' health conditions requiring them to move closer to family/medical providers, residents with mobility issues in need of a ground floor unit, and safety reasons, including those related to domestic violence. Calls were also received from residents reporting their dissatisfaction with the service or lack of response from staff on property. Residents were assisted and information was also relayed back to property management.

UPDATES REGARDING COVID-19

- Lobby visits have more than doubled since the last reporting period.
- Residents have visited the lobby to submit required documents for vouchers, request voucher extensions before the expiration date, and to complete recertifications of housing assistance.

ASSISTED HOUSING PROGRAMS

- The CS Team is working to establish a balance to support all AHP and PH residents as requests in the lobby have increased and the number of incoming calls remains high.
- 4,268 of the total 6,981 emails received were from Opportunity Home-partnered landlords/owners.
- Residents and landlords inquired about the status of Housing Assistance Payments (HAP) and requested information on becoming a participating landlord in addition to inquiries regarding rent increases, tenancy approvals, inspection updates, and lease violations.

PUBLIC HOUSING

- The Call Center received several calls for assistance from residents who had concerns regarding their property's service or lack of communication. Customer Service Staff continues to assist residents by providing guidance and communicate to property management staff as needed to ensure concerns are properly addressed.

IMPROVEMENTS

LOBBY SOFTWARE

- Staff have implemented lobby software that allows for residents to receive text message alerts at their appointment time from the Federal Housing Programs (FHP) lobby.
- A QR code is available for residents to check-in from their cellular device and remain in their vehicle. This feature reduces crowding in the lobby and keeps social distancing measures in place for the safety of residents and staff.
- Residents receive a text message at the time of their appointment to enter the building for assistance.

RINGCENTRAL DASHBOARD

- Although RingCentral has streamlined some interactions and processes, the reporting capabilities remain limited, so the Client Services team must continue manually tracking data to ensure numbers reported are accurate.
- Staff are continually working with RingCentral to improve reporting in order to establish a dashboard with data reporting features.

Fiscal Year 2022-2023 Insurance Renewals for Opportunity Home and its Affiliates

Insurance Type or Insured Entity	2021-2022 Premiums				2022-2023 Request to Board				2022-2023 Premiums			
	Property	Liability	Umbrella	Total	Property	Liability	Umbrella	Total	Property	Liability	Umbrella	Total
Automobile Fleet	\$0	\$59,111	\$0	\$59,111	\$0	\$65,022	\$0	\$65,022	\$0	\$60,877	\$0	\$60,877
Cyber Liability	\$0	\$32,727	\$0	\$32,727	\$0	\$40,909	\$0	\$40,909	\$0	\$30,272	\$0	\$30,272
Fiduciary, EPL, and D&O	\$0	\$70,169	\$0	\$70,169	\$0	\$87,711	\$0	\$87,711	\$0	\$80,493	\$0	\$80,493
Fidelity/Crime	\$0	\$8,839	\$0	\$8,839	\$0	\$11,049	\$0	\$11,049	\$0	\$8,936	\$0	\$8,936
Workers' Compensation	\$0	\$185,852	\$0	\$185,852	\$0	\$204,437	\$0	\$204,437	\$0	\$140,409	\$0	\$140,409
Flood	\$15,297	\$0	\$0	\$15,297	\$19,121	\$0	\$0	\$19,121	\$20,872	\$0	\$0	\$20,872
Property and Liability:												
Converse Ranch, LLC: Converse Ranch I	\$35,872	\$6,873	\$3,375	\$46,120	\$44,840	\$8,591	\$4,219	\$57,650	\$52,489	\$7,426	\$5,421	\$65,336
Durango Midrise, LP	\$79,072	\$12,593	\$5,900	\$97,565	\$98,840	\$15,741	\$7,375	\$121,956	\$82,280	\$13,204	\$6,606	\$102,090
Las Varas Public Facility Corporation: Vacant land	\$0	\$4,467	\$3,000	\$7,467	\$0	\$5,584	\$3,750	\$9,334	\$0	\$4,746	\$5,000	\$9,746
Public Housing	\$1,179,044	\$304,520	\$0	\$1,483,564	\$1,473,806	\$380,650	\$0	\$1,854,456	\$1,218,565	\$327,112	\$0	\$1,545,677
SAHA Boiler & Machinery	\$31,498	\$0	\$0	\$31,498	\$39,373	\$0	\$0	\$39,373	\$34,693	\$0	\$0	\$34,693
San Antonio Housing Development Corporation	\$190,326	\$36,683	\$11,536	\$238,545	\$237,908	\$45,854	\$14,420	\$298,181	\$305,769	\$48,537	\$17,232	\$371,538
San Antonio Housing Facility Corporation	\$465,851	\$91,792	\$28,393	\$586,036	\$582,314	\$114,740	\$35,491	\$732,545	\$497,071	\$110,450	\$39,018	\$646,539
Springhill Courtland Hts Public Facility Corporation	\$160,477	\$27,370	\$8,219	\$196,066	\$200,596	\$34,213	\$10,274	\$245,083	\$173,616	\$25,968	\$9,742	\$209,326
Woodhill Public Facility Corporation	\$214,510	\$36,064	\$10,882	\$261,456	\$268,138	\$45,080	\$13,603	\$326,820	\$230,190	\$35,356	\$38,298	\$303,844
Beacon Housing Solutions, LLC	\$172,058	\$35,564	\$10,519	\$218,141	\$215,073	\$44,455	\$13,149	\$272,676	\$184,863	\$37,996	\$14,096	\$236,955
Total Request/Cost of Insurance	\$2,544,005	\$912,624	\$81,824	\$3,320,312	\$3,180,007	\$1,104,036	\$102,280	\$4,386,322	\$2,800,409	\$931,782	\$135,413	\$3,867,603
Approximately 15% for additions, increases, adjustments, or events								\$657,948				
Total Request including additions								\$5,044,271				
Increase/(Decrease) from 2021-2022 Premiums									\$256,403	\$19,158	\$53,589	\$547,291
									10.08%	2.10%	65.49%	16.48%

				Est Closing							Income Mix							
Project Name	District	Developer	Financing	Date	TotalDevCost	Developer Fees	Tax Credit Equity	Tax Abatement	# Units	PH/PBV	30%	40%	50%	60%	70%	80%	Market	
Financing Closed (under Construction)																		
1604 Lofts	D2	NRP	4% Tax Credits & Bonds	Closed	\$56,663,651	\$6,158,000	\$17,072,192	\$1,201,269	324		33		0	224		67	0	
Aspire at Tampico*	D5	Mission DG	4% Tax Credits & Bonds	Closed	\$34,115,710	\$4,205,093	\$7,379,055	\$723,253	200		9	10	18	68	21	10	64	
Trader Flats (The Scott)	D4	NRP	4% Tax Credits & Bonds	Closed	\$55,753,169	\$5,847,000	\$16,984,301	\$1,181,967	324		33		0	224	67		0	
Culebra Crossing	D6	Lynd	HUD 221(d)(4)	Closed	\$50,123,889	\$250,000	\$0	\$1,062,626	327		0		0	0		164	163	
Mira Vista*	D7	Hogan	4% Tax Credits & Bonds	Closed	\$45,917,596	\$5,440,000	\$15,296,164	\$973,453	312		0		0	312		0	0	
Kitty Hawk Flats	Converse	NRP	4% Tax Credits & Bonds	Closed	\$40,503,098	\$4,331,000	\$12,387,511	\$858,666	212		22		0	135	55		0	
Legacy at Alazan*	D5	NRP	9% Tax Credits	Closed	\$19,155,261	\$1,960,000	\$14,061,093	\$406,092	88	40				40		0	8	
100 Labor*	D1	Franklin	HUD 221(d)(4)	Closed	\$52,438,321	\$3,318,932	\$0	\$1,111,692	213		27		17	0		0	169	
Watson Road (Frontera Crossing Apartments)	D4	NRP	4% Tax Credits & Bonds	Closed	\$60,567,278	\$6,803,000	\$24,735,526	\$1,284,026	348			18	18	294	18	0	0	
Copernicus (Seven07 Lofts)	D2	NRP	4% Tax Credits & Bonds	Closed	\$55,389,378	\$6,009,000	\$22,199,005	\$1,174,255	318			17	17	267	17	0	0	
Vista at Interpark	D9	Atlantic Pacific Comm.	9% Tax Credits	Closed	\$17,554,339	\$1,827,570	\$13,948,605	\$372,152	64		7		16	41				
Vista at Everest	D1	Atlantic Pacific Comm.	9% Tax Credits	Closed	\$18,109,812	\$1,823,814	\$13,948,605	\$383,928	64		7		16	41				
Bristol at Somerset	D4	Louis Poppoon Development Consulting	4% Tax Credit & Bonds	Closed	\$65,988,882	\$7,500,000	\$25,552,709	\$1,398,964	348		0	0	0	348	0	0	0	
Horizon Pointe	D2	Integrated Realty Group	4% Tax Credits & Bonds	Closed	\$65,639,352	\$7,498,298	\$25,025,832	\$1,391,554	312		20	35	106	0	151	0	0	
Josephine	D1	Lynd	Conventional Loan	Closed	\$68,463,888	\$250,000	\$0	\$1,451,434	261		0		0	26		105	130	
Palo Alto	D4	Streamline	4% Tax Credits & Bonds	Closed	\$67,848,057	\$7,562,045	\$24,188,411	\$1,438,379	336		16	16	32	244	28			
Potranco	D4	Lynd	Conventional Loan	Closed	\$67,914,812	\$250,000	\$0	\$1,439,794	360		0		0	36		144	180	
Total					\$842,146,493	\$71,033,752	\$232,779,009	\$17,853,506	4411	40	174	96	240	2300	357	490	714	
Board Has Approved																		
Board Provided Final Approval																		
The Sorento # (resyndication of tax credits)	D7	Fairfield Residential	4% Tax Credits & Bonds	acquisition closed (tax credits resyndication closed 6/21/22)	\$41,061,812	\$1,521,984	\$22,474,000	TBD	248	0	38	0	0	210	0	0	0	
Bethel Place # (resyndication of tax credits)	D6	Fairfield Residential	4% Tax Credits & Bonds	acquisition closed (tax credits resyndication closed 6/24/22)	\$42,812,000	\$1,824,099	\$25,787,962	TBD	250	0	38	0	0	212	0	0	0	
Rosemont at University Park (resyndication of tax credits)	D4	Roers Companies	4% Tax Credits & Bonds	acquisition closing estimated 7/31/22	TBD	TBD	TBD	TBD	240	0	36	0	0	294	0	0	0	
Costa Almadena (resyndication of tax credits)	D3	DEVCO	4% Tax Credits & Bonds	acquisition closed (tax credits pending)	TBD	TBD	TBD	TBD	176	0	27	0	0	149	0	0	0	
Tigoni Villas (resyndication of tax credits)	D7	DEVCO	4% Tax Credits & Bonds	acquisition closed (tax credits pending)	TBD	N/A issuance of bonds only	TBD	N/A	140	0	22	12	22	84	0	0	0	
The Ravello (purchase of limited partnership interest)	D3	SAHA will own 100% of partnership	N/A	11/1/22	N/A	N/A	N/A	TBD	252	0	0	0	0	252	0	0	0	
San Juan II (purchase of limited partnership interest)	D5	SAHA will own 100% of partnership	N/A	5/25/22	N/A	N/A	N/A	TBD	144	48	15	0	0	123	0	0	6	
Snowden Road*	D7	SAHA	9% Tax Credits	Pending	\$25,683,236	\$2,599,000	\$13,948,605	\$544,485	135	54	14		26	41				
Total					\$25,683,236	\$2,599,000	\$13,948,605	\$544,485	1585	102	190	12	48	1365	0	0	6	
Board Approved Bond Inducement																		
Artisan at Springview*	D2	Franklin	4% Tax Credits & Bonds	Pending	\$64,001,571	\$7,044,312	\$25,074,843	^\$2,014,960	\$1,356,833	325	65	0		8	181	53	18	0
Victoria Commons - North Pond*	D1	Catellus	TBD	Pending	TBD	TBD	TBD		TBD		TBD		TBD	TBD		TBD	TBD	
Total					\$64,001,571	\$7,044,312	\$27,089,803	\$1,356,833	325	65	0	0	8	181	53	18	0	
Board Approved the Developer																		
Victoria Commons - South Pond*	D1	Catellus	TBD	Pending	TBD	TBD	TBD		TBD		TBD		TBD	TBD		TBD	TBD	
Victoria Commons - Townhomes*	D1	Catellus	TBD	Pending	TBD	TBD	TBD		TBD		TBD		TBD	TBD		TBD	TBD	
Fiesta Trails	D8	NRP	9% Tax Credits	Pending	\$19,723,244	\$1,884,000	\$13,423,658	\$418,133	60		6		24	30				
Vista at Silver Oaks		Atlantic Pacific Comm.	9% Tax Credits	Pending	\$24,183,539	\$2,307,314	\$18,398,160	\$512,691	76	0	8	0	23	45	0	0	0	
Total					\$43,906,783	\$4,191,314	\$31,821,818	\$930,824	136	0	14	0	47	75	0	0	0	
Pending Board Consideration																		
Alazan Courts*	D5	TBD	TBD	Pending Board Consideration	TBD	TBD	TBD											
Total					\$0	\$0	\$0	\$0	0	0	0	0	0	0	0	0	0	
Grand Total					\$975,738,083	\$84,868,378	\$305,639,235	\$20,685,647	6,457	207	378	108	343	3,921	410	508	720	

*SAHA owned land

^ Historical Tax Credits

Total development cost = acquisition price plus rehab soft and hard costs